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Equity in Action: Leveraging SAMHSA SOAR Technical Assistance to Improve Systems

Substance Abuse and Mental Health Services Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.

March 24, 2022



SAMHSA
Substance Abuse and Mental Health
Services Administration

Disclaimer

The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).

Webinar Instructions

- **Slides/Materials:** Available now at <https://soarworks.samhsa.gov/topics/webinars>
- **Recording:** Will be available within 1 week
- **Questions:** Please submit questions using the Q&A feature
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Purpose and Objectives

- Learn about work being done at the SAMSHA SOAR TA Center, SAMHSA Homeless and Housing Resource Center (HHRC), and in community organizations to address the barriers to equity in SOAR implementation and housing/homelessness service delivery.
- Hear from experts and service providers on what equity means and why Diversity, Equity and Inclusion (DEI) consideration is an important step to ensure equitable service delivery.
- Learn how providers use the products and tools developed by SAMHSA to reduce the gaps that may contribute to disparities in how homeless services are accessed and delivered within your agency and community.
- Share views on what equity means to participants and their organizations.

Agenda

Presenters

- Dazara Ware, MPC, Assistant Director, SAMHSA SOAR TA Center, Policy Research Associates, Inc., Delmar, New York
- Kevin A. James, LPC, Project Associate II, SAMHSA's Homeless and Housing Resource Center (HHRC), Policy Research, Inc., Delmar, New York
- Josh Johnson, Director of Training and Equitable Practice, Coalition on Homelessness and Housing in Ohio (COHHIO), Columbus, Ohio
- Caroline Bolas, Director of the SOAR Initiative and SOAR State Lead, Baltimore, Maryland
- Kascadare Causeya, MBA, Program Manager for BEST/Central City Concern, Portland, Oregon
- Program Participant, Central City Concern, Portland, Oregon

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center

Welcome!

Asha Stanly, MSW, LICSW
Government Project Officer
Division of State and Community Systems Development
Center for Mental Health Services
SAMHSA SOAR TA Center

March 24, 2022



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SAMHSA SOAR TA Center: Overview of DEI Tools and Resources

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Delmar, New York

March 24, 2022



SAMHSA
Substance Abuse and Mental Health
Services Administration

Guidance for Improving Staff Engagement



Guidance for Improving Staff Engagement

Integrating Diversity, Equity, and Inclusion in SOAR Work

Purpose of the Guidance:

- Begin conversations with staff that serve Black, Indigenous, and people of color (BIPOC)
- Use as a resource to strengthen engagement practices that minimize bias with individuals we serve and improve staff relationships and workplace wellness
- Address inequity to strengthen workplace support and safety for all team members
- Establish a foundation of safe places within the workplace that can be extended to the people we serve (both physically and emotionally)

As we all do our best to address the barriers associated with racism and inequity, we must accept the discomfort that comes with the effort to learn about ourselves, learn about each other, and grow to create a psychologically safe environment in which staff can work and thrive. Conversations regarding race in the workplace can be challenging. While BIPOC staff may be reluctant to share the injustices they've experienced firsthand, other staff may feel hesitant to speak up for fear of offending anyone. This results in a workplace that is comfortable for the fearful and tremendously unsafe for the reluctant. This guidance invites you to reflect on the actions that can take place before, during, and after conversations with BIPOC staff.

Pre-Engagement

1. Be more than aware. Address your own biases.

- Take time for self-reflection after taking Harvard's [Implicit Bias Test](#).
- Awareness isn't enough. Take action steps to address biases and overcome them.
 - Learn more: [Implicit Bias Awareness and Change](#)
- Be mindful that transformation starts from a "heart place" before it can be evident in the workplace.

2. Recognize that the trauma WILL happen – AGAIN. How will you respond to your staff?

- Traumatic events will not always reach national media. Most trauma experienced by BIPOC staff is subtle and persistent. Just because BIPOC staff don't look like they are struggling to manage the stress of enduring the trauma, it does not mean that they aren't.
- When does trauma happen? Daily! With every news story of injustice. With every "unintended" microaggression. With every discussion about inequity led by people in positions that are not equitable. With every pay inequity. With every health disparity. With every unfair housing practice. With every Brown and Black unarmed life lost to police shooting and every subsequent acquittal. With every wrongful conviction and life captured behind bars, only later to be found "not-guilty" and released with no consequence for those that falsely imprisoned them. With every time the word "inmate" is used in a way that sounds synonymous with "unequal and inhuman." With every protest called "riot." With every, "All Lives Matter." With every mention of the "response" to the Opioid crisis when there was no "response" to address the substance use treatment of Black and Brown people. With every unhelpful and harmful comment about how you just want the "world to go back to normal" after civil unrest. For Black

- Improving conversations with Black, Indigenous, and people of color (BIPOC) staff
- Addressing inequity to strengthen workplace support and safety
- Extending this to the people we serve

Hiring and Supervising SOAR Caseworkers: Toolkit

- Recruiting for highly skilled positions
- Interviewing for DEI experience
- Ensuring pay equity
- Supervising SOAR case worker positions



Identifying Applicants: DEI Considerations



Reducing Implicit Bias and DEI Considerations for Identifying SOAR Applicants

The SAMSHA SOAR TA Center is working to reduce the influence of implicit bias and encourage diversity, equity, and inclusion during the process of identifying potential applicants to assist with SOAR-assisted SSI/SSDI applications. Included are helpful tips to consider when utilizing the *Identifying SOAR Applicants* tool. This guidance asks you to consider how a potential applicant's racial, ethnic, and cultural views regarding disabilities, diagnoses, symptoms, and treatment as well as their socioeconomic and homelessness status may factor into a SOAR caseworker's decision to assist them with a SOAR-assisted SSI/SSDI application.

The overarching questions we encourage you to ask yourself are:

- Am I only assisting individuals with SOAR-assisted SSI/SSDI applications who have a formally diagnosed mental and/or physical health condition(s) and who are currently engaged in treatment?
- Am I "screening out" potential SOAR applicants who may qualify for SSI/SSDI benefits, but do not yet have a formal diagnosis and have not yet received treatment?

Eligibility Criteria	Information to Consider
Key Eligibility Criteria for SSA Disability Benefits	<ul style="list-style-type: none"> Are there racial, ethnic, or cultural reasons why a potential applicant may not consider themselves as someone who has a disability, serious mental illness, or has mental health symptoms? Are there reasons such as current mental health symptoms/impairments and education level which may prevent a person from being able to accurately describe their illness, symptoms, and functional limitations? Are there engagement and communication strategies that you can employ when working to identify a potential SOAR applicant that keep these considerations in mind?
SOAR Recommends: Characteristics that may Strengthen an SSI/SSDI Application	<ul style="list-style-type: none"> Are there racial, ethnic, or cultural reasons why a potential applicant might not be taking psychiatric medications? Are there racial, ethnic, or cultural reasons why a potential applicant might not be receiving psychiatric treatment for their mental illness or medical conditions? Is there community stigma associated with mental illness or physical disability they are currently or have historically experienced? Does the potential applicant have significantly less access to psychiatric and/or medical treatment in their community that may be related to their race, ethnicity, culture, or socioeconomic status? Has the potential applicant been unable to access psychiatric and/or medical treatment due to their lack of income, lack of health insurance, and/or homelessness status? Before "screening out" a potential applicant who does not take psychiatric medications and does not yet have obtainable medical evidence, can you employ any outreach strategies that may assist this potential applicant with accessing this treatment or an assessment for their illness(es)/condition(s)?

- Overarching questions
- Information to consider that may be linked to the applicant's racial, ethnic, or cultural identity

Medical Summary Report: DEI Considerations

- Reducing implicit bias
 - Race
 - Gender
 - Sexual orientation
- Legal History
- History of Trauma

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Reducing Implicit Bias in the Medical Summary Report (MSR)

It is important to reduce the influence of implicit bias by the writer and those that review MSRs for SOAR-assisted SSI/SSDI applications. Included are helpful tips that help emphasize the experience of the applicant while reducing the stereotypes and biased language that foster discrimination against applicants based on race, gender, sexual orientation, substance use disorders, and past or current involvement in the legal system.

The overarching question to ask yourself: Does including this information help provide insight into the applicant's current functioning?

Categories	Relevant Evidence for Inclusion	Information to Consider
Demographics <ul style="list-style-type: none">• Race• Gender• Sexual orientation	<ul style="list-style-type: none">• Did the applicant experience trauma that can be connected to discrimination, denial of access to medical/educational/or legal services due to discrimination or prejudice?• Does the impact of historical trauma influence the applicant's current ability to function?	<ul style="list-style-type: none">• Historical Trauma (Consider the era and the location of where the applicant was raised)• Is there a history of poverty?• Response to and interaction with others that are of a different race/ethnicity/orientation
Legal History	<ul style="list-style-type: none">• Were there any connections between their symptoms and contacts with police?• What evidence, including evaluations or treatment information, is included to support that the applicant's legal involvement is linked to the behavior that is a consequence of the symptoms of the applicant's conditions?• Are there examples of interactions with police that are linked to behaviors as result of the applicant's symptoms?• Is there information provided by collateral sources (e.g., friends, family members, spouse, co-workers) about why the applicant has recurrent contact with police that can be linked to the symptoms that the applicant experiences?	<ul style="list-style-type: none">• Only list the charges that can be linked to arrests and contact with police due to behaviors that were associated with the applicant's diagnoses.• For instance, if an applicant has several arrests for aggressive and disruptive behavior that can be linked to the symptoms of the paranoia that they experience (as a result of their mental health diagnosis of Paranoid Schizophrenia), discussing that incident of arrest can be helpful to illustrate the severity of the applicant's symptoms and functioning.• Prisons and jails have a unique culture that may result in functional limitations being documented in "disciplinary" reports or other documentation outside of formal medical records.• Institutional living arrangements are a community on the "inside." The same way that the applicant struggles to function in the outside community, they will struggle in the community "inside" their current living arrangement – the struggle just "looks" different because of where they are at the time. Be sure to take a deeper look.

SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance Center March 2021

MSR Interview Guide and Template



Medical Summary Report Interview Guide and Template

The **Medical Summary Report (MSR) Interview Guide** provides sample questions and guidance for gathering information necessary to the SSI/SSDI disability determination process. We do not expect you to ask all the questions in each section. The questions are intended to help you gather all the information you will need to write a Medical Summary Report. For example, if the individual has not been in military service, there is no need to include a military history section. Likewise, if the individual has no legal issues, do not include a legal history section.

Using this guidance, SOAR-trained providers are able to gather a thorough history in a respectful manner, which in turn helps the Disability Determination Services (DDS) understand the duration of a person's impairment and the effect of their illness(es) on work ability and functioning. The **MSR Template** may be used to compile information in the form of a narrative letter to SSA/DDS as part of the SOAR process. The template has eight main sections, covering the types of information that DDS needs to make a decision. Use the headings provided in the template to organize your MSR.

Using Trauma Informed Interviewing to Reduce Implicit Bias

The SAMSHA SOAR TA Center is working to reduce the influence of implicit bias and encourage diversity, equity, and inclusion (DEI) during the information gathering process for the Medical Summary Report. This guidance asks you to consider how a potential applicant's racial, ethnic, and cultural backgrounds may impact their perceptions regarding their disabilities, diagnoses, symptoms, and treatment and to be mindful of how this may impact your opinions/feelings/attitudes towards the client's functioning. The interviewing process can uncover very sensitive topics such as past and current trauma, thus it is important to be sensitive to influences that affect a person's willingness and ability to provide information. How questions are asked during this process can be critical to obtaining the appropriate information.

The overarching question you should be asking yourself is: Does asking this information help provide insight into the applicant's functioning? Is the question being asked in a way that conveys a sense of care and non-judgement?

- Using Trauma Informed Interviewing to Reduce Implicit Bias
- New Notes:
 - Information to Consider
 - Relevant Evidence for Inclusion

SOAR Referral Process Toolkit

- Resource for developing a community referral workflow
- Separate tracking spreadsheet
- Analyze referral acceptance data for racial equity




SOAR Referrals Workflow Packet Product Guide

SOAR Agency and Community Assessment
The Agency and Community Assessment tool can help SOAR providers determine who is most likely to send referrals, which agencies/departments need SOAR marketing information, and who can assist potential applicants who are not eligible for SOAR services within your agency. We recommend completing these assessments prior to editing your referral process tools.

SOAR Marketing Tool
SOAR providers can customize this marketing tool to highlight their program criteria, SOAR outcomes, and guidance on making appropriate referrals. Make sure to edit the information in all sections of this infographic to fit with your agency. In the highlights section, feel free to change up the information to market what makes your SOAR program stand out. Creativity is encouraged with this tool!

Agency SOAR Referral Workflow
This workflow is useful for walking SOAR providers through each step of the referral process. Direct links are provided throughout the workflow to guide users to forms and resources that will be used throughout the referral process.

Sample Referral Application
The Sample Referral Application is a great tool to use as a template for your own agency's SOAR referral process. Be sure to make appropriate edits; we want this form to fit with your agency's SOAR program.

Applicant Resource Guide
All good referral systems need a back-up plan! Customize this resource guide to assist potential applicants who are not eligible for SOAR at your agency. Make sure to include contact information for each source provided on this form.

Referral Tracking Worksheet
The tracking worksheet will help you keep track of the quantity and quality of referrals from agencies throughout your community. Tracking your referrals will help to identify where your best referrals are coming from and which agencies need some guidance on making appropriate referrals.

Referral Source Information						
Referring Email	Referring Phone	Date of Referral	Date of Follow-up	Referral Disposition	Reason for Disposition	
soar@samhsa.com	555-444-3333	1/25/2020		1/25/2020	Not accepted	No aware involvement
soar@samhsa.com	555-444-3333	1/24/2020		1/25/2020	Waitlist placement	Lack of evidence/documentation
soar@samhsa.com	555-444-3456	1/24/2020		1/25/2020	Active placement	Meets program criteria
soar@samhsa.com	555-444-3421	1/25/2020		1/26/2020	Priority placement	Meets program criteria
soar@samhsa.com	555-444-3440	1/26/2020		1/27/2020	Priority placement	Meets program criteria
soar@samhsa.com	555-444-3440	2/1/2020		2/2/2020	Active placement	Meets program criteria
soar@samhsa.com	555-444-3443	2/4/2020		2/5/2020	Active placement	Meets program criteria
soar@samhsa.com	555-444-3333	2/5/2020		2/6/2020	Active placement	Meets program criteria
soar@samhsa.com	555-444-3333	2/10/2020		2/11/2020	Not accepted	Not at-risk of homelessness

Applicant Information							
Ethnicity	Diagnosis/Conditions	Co-Occurring Disorders	Treatment at Time of Referral	Work Activity			
	Depression		Current use	None recent treatment	Current		
	Depression		Recent use	Recent (within last 90 days)	Past		
John Jones	45 Male	White	Schizophrenia, OUD	PSTD, Asthma	Past use	Past (within the past year)	Past
Jane Smith	23 Non-binary	White	Anxiety, Back Pain, SUD		In Treatment	Current	Current
Jane Doe	40 Female	Black	Depression, Learning Disability		None	Current	None
Jane Jones	45 Female	Latinx	Schizophrenia		Past use	Past (within the past year)	Past
Mary Smith	43 Female	Black	PSTD, TBI		Past use	Recent (within last 90 days)	None
Mary Jones	54 Female	Black	Anxiety, Lupus, SUD		Current use	No recent treatment	Current
Mary Doe	61 Female	American Indian	Schizophrenia		None	Recent (within last 90 days)	Current

Outcome of the Referral							
Quality of Referral	Date of Intake Assessment	Date SS/SSDI App Submitted	App Not Submitted	Date of Decision	Outcome of Decision	OAR ApID	Additional Notes
Missing information	N/A	N/A	N/A	N/A	N/A	N/A	N/A/Referred to VR
Complete information	2/15/2020	3/15/2020	N/A	4/15/2020	Approved	er34e7056	
Required multiple follow-ups	1/26/2020	2/26/2020	N/A	3/26/2020	Denied	er34e7050	
Complete information	1/27/2020	2/27/2020	N/A	3/27/2020	Approved	er34e7045	
Complete information	1/18/2020	N/A	N/A	N/A	N/A	N/A	N/A/Will do pre-release app
Complete information	2/3/2020	3/3/2020	Incarceration	4/3/2020	Approved	er34e7045	
Required multiple follow-ups	2/6/2020	3/6/2020	N/A	4/6/2020	Approved	er34e7042	
Missing information	2/7/2020	3/7/2020	N/A	4/7/2020	Approved	er34e7043	
Complete information	N/A	N/A	N/A	N/A	N/A	N/A	N/A/Referred to Legal Aid

SAMHSA's Homeless and Housing Resource Center (HHRC)

Kevin James, LPC-A
Project Associate II

SAMHSA's Homeless and Housing Resource Center (HHRC)
Policy Research, Inc. Delmar, New York

March 24, 2022



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Mission and Vision



- **Mission:** HHRC provides training on housing and treatment models focused on adults, children, and families who are experiencing or at risk of homelessness and have serious mental illness and/or serious emotional disturbance, substance use disorders, and/or co-occurring disorders.
- **Vision:** Become a central hub of easily accessible, no-cost training for health and housing professionals in evidence-based practices that contributes to housing stability, recovery, and an end to homelessness.

SAMHSA Partnerships



- SAMHSA Homeless and Housing Resource Center
- Connection with SAMHSA TTC Leadership and Centers of Excellence



- SAMHSA SSI/SSDI Outreach, Access, and Recovery (SOAR) TA Center
- SAMHSA GAINS Center for Behavioral Health and Justice Transformation
- SAMHSA Service Members, Veterans, and their Families TA Center

HHRC DEI Goals



- **Goal:** Expand access to HHRC resources via Spanish translation, American Sign Language interpretation, and live captioning.
- **Goal:** Promote culturally and linguistically appropriate evidence-based practices and emerging trends in the housing and homelessness sector.

HHRC DEI Goals



- **Goal:** Foster a diverse, equitable, and inclusive HHRC Community.
- **Goal:** Elevate the voices of persons with lived experience (PLE) of homelessness and recovery.
 - Conduct focus groups with service providers and PLE to incorporate feedback into HHRC products.
 - Compensate PLE as Consultants for participating in focus groups and webinars.



HHRC DEI in Action

- Self-paced, no-cost, online courses – open to the public
 - Introduction to Housing Models, Housing Navigation, and Engagement
 - Upcoming courses include Introduction to Treatment Models, Whole-Person Care for Opioid Use Disorder, and Introduction to Mental Illness
- Webinars
 - American Sign Language (ASL) Interpretation and live captioning
 - Recorded and posted with English and Spanish captions
 - Incorporate panelists with lived expertise



HHRC DEI in Action

- Toolkits
 - Whole Person Care for People Experiencing Homelessness and Opioid Use Disorder
 - Applying New COVID-19 Related Funding to Address the Housing Needs of Individuals with SMI, SUD, COD
 - Helping Individuals Experiencing Homelessness Obtain Identification Documents
- Supportive Housing Learning Community
 - Three-part series for health and housing professionals

HHRC Website

Filter [Clear All](#)

5 results found

FOCUS ▾

TOPIC ▾

TYPE ▾

CONTENT TYPE ▾

LANGUAGE ▴

English (5)

Spanish (3)

- hhrctraining.org
- Launched August 2021
- [Need Help](#) page available in English and Spanish
- Filter by language in [Knowledge & Resource tab](#)
- All webinars and training courses are available at no cost

Thank You!

SAMHSA's Homeless and Housing Resource Center provides high-quality, no-cost training for health and housing professionals in evidence-based practices that contributes to housing stability, recovery, and an end to homelessness.

Contact Us:

<http://hhrctraining.org/>

info@hhrctraining.org

518-439-7415x4



Equity in Action: Coalition on Homelessness and Housing in Ohio (COHHIO)

Joshua Johnson

Director of Training and Equitable Practice
Coalition On Homelessness and Housing In Ohio (COHHIO)
Columbus, Ohio

March 24, 2022



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Coalition on Homelessness and Housing in Ohio

COHHIO

- Overview of the programs and services administered to help solve homelessness in Ohio
- SOAR Ohio
- Racial Equity Committee



Disclaimer

*COHHIO has **not** solved Racism within the homeless system



Source: Spiske, M. (2020). *Rusty metal iron weathered sticker "caution" ! P* hotograph, Bayreuth, Deutschland.

COHHIO Equity in Action Statement



- “...We strive to utilize a progressive racial equity lens in providing ongoing and impactful trainings, technical assistance, data analysis, and program oversight in our work to eliminate homelessness and achieve safe, decent, and affordable housing for all...”

What is COHHIO's Racial Equity Committee (REC)?

- COHHIO's Racial Equity Committee (REC) is a response to the overwhelming need to address racial inequities in housing and homelessness
- Began In 2018
- Initially focused externally, now focused internally
 - Partnered with C4 Innovations for statewide training
 - Develops guidance/resources
 - Internal audits
 - Monthly Internal conversations/trainings
 - Including leadership and board
 - Homeless system focused



R.E.A.C.H Ohio



R.E.A.C.H Ohio's Committees

Informational Committee

- Focus: Equity Training & Technical Assistance, and Data Analysis

Organizational Committee

- Focus: Equitable Service Delivery & Racially Equitable Decision Making

Systemic Committee

- Focus: Equitable Advocacy & Cross System Collaboration

SOAR Tools in Action: Hiring and Staff Engagement



Hiring Plan and Job Description

Hiring Plan Considerations

To work toward an equitable and successful hiring process it can be helpful to develop a hiring plan prior to interviewing a potential SOAR case worker. This process may include consulting with a racial equity manager, developing a unique job description, and discussing where and how to post the announcement in order to generate a diverse pool of applicants.

Equitable Hiring Practices

- The Harvard Business Review offers practical ways to reduce bias in your hiring practice: <https://hbr.org/2017/06/7-practical-ways-to-reduce-bias-in-your-hiring-process>

Sustainability

- The National SOAR Outcomes Report 2020 indicates that the average annual salary for dedicated SOAR benefits specialists (as reported by 13 states) was \$40,800. Salaries for SOAR staff ranged from \$28,000 to \$65,000, depending on the local cost of living and staff expertise. However, according to the job site, *Indeed*, the average salary for a caseworker is \$45,684 per year in the United States (based on 1.2k salaries reported, as of March 11, 2021). The difference between these averages leaves ample opportunity for hiring practices to take into account the specialized training involved in effectively doing the work of a SOAR case worker and make way for more equitable salaries for SOAR providers across the country. More specifically, since women make up the majority of the case workers in the field, increase in pay would be a progressive step toward actively redressing one small part of the gender pay gap.
- When employers recognize the value of SOAR case workers and coordinators by offering them equitable salaries, the benefits go beyond the individual case worker. Fair compensation may also help with staff retention and ultimately increase the sustainability of SOAR work.

A sample job description is provided below, but any job description should be tailored to the unique needs of each agency and community. Remember, job listings play an important role in recruiting talent and often provide the first impression of a company's culture.

Sample Job Description

Position Title: SOAR Benefits Specialist

Classification: Case Manager II

Salary Range: \$50,000-\$60,000

Position Summary

SSI/SSDI Outreach, Access, and Recovery (SOAR) is a model that helps individuals experiencing or at risk of homelessness who have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder apply for Social Security disability benefits.



Responsibilities of the SOAR Benefits Specialist include but are not limited to the following:

The SOAR Benefits Specialist will report to the Case Management Supervisor. The SOAR Benefits Specialist must be able to work in the community and meet individuals experiencing homelessness where they are, including in the woods, under bridges, and in abandoned houses. This position requires at least 2 years of experience working directly with individuals experiencing homelessness who have a serious mental illness and/or co-occurring substance use disorder; evidence of ongoing training and education in related areas such as mental illness, substance abuse, and/or homelessness; an ability to work in non-traditional settings and unstructured environments; and a valid state driver's license with a clean driving record. SOAR training is a plus. The position requires someone who is organized and has an ability to prioritize tasks quickly. The SOAR Benefits Specialist will also attend any trainings/certifications as required by the state.

Position Responsibilities

- Work with referral sources and community partners to identify applicants through team meetings, outreach, and referrals
- Complete interviews with individuals to gather information to complete SSI/SSDI applications
- Gather medical records and other information to complete SSI/SSDI applications
- Write SOAR Medical Summary Reports for individual applications
- Accompany individuals to appointments at the Social Security Administration
- Coordinate visits to medical doctors, psychiatrists, and other specialists to obtain evidence for the application
- Coordinate case management services with partners and help with providing case management services to individuals when needed
- Assist the team with administrative tasks as needed

Position Qualification Requirements

- Excellent interpersonal and communication skills
- Ability to prioritize multiple tasks and meet frequent deadlines
- Superior organizational skills and attention to detail
- Computer experience, including troubleshooting and problem solving and proficiency in MS Office applications (Word, Excel) and database management
- Good writing skills and the ability to analyze extensive data and create written reports with accuracy and brevity
- Ability to maintain professional boundaries and engagement skills with a challenging population and in non-traditional work conditions

Helpful Experience

- A Bachelor's degree in a related field, or certification as a Peer Specialist
- Evidence of ongoing training and education in related areas such as mental illness, substance abuse, and/or homelessness
- Lived experience of homelessness or mental illness
- Familiarity with Social Security Administration's Listings of Impairments

SOAR Tools in Action: DEI Consideration




Reducing Implicit Bias and DEI Considerations for Identifying SOAR Applicants

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The overarching questions we encourage you to ask yourself are:

- Am I only assisting individuals with SOAR-assisted SSI/SSDI applications who have a formally diagnosed mental and/or physical health condition(s) and who are currently engaged in treatment?
- Am I "screening out" potential SOAR applicants who may qualify for SSI/SSDI benefits, but do not yet have a formal diagnosis and have not yet received treatment?

Eligibility Criteria	Information to Consider
Key Eligibility Criteria for SSA Disability Benefits	<ul style="list-style-type: none"> Are there racial, ethnic, or cultural reasons why a potential applicant may not consider themselves as someone who has a disability, serious mental illness, or has mental health symptoms? Are there reasons such as current mental health symptoms/impairments and education level which may prevent a person from being able to accurately describe their illness, symptoms, and functional limitations? Are there engagement and communication strategies that you can employ when working to identify a potential SOAR applicant that keep these considerations in mind?
SOAR Recommends: Characteristics that may Strengthen an SSI/SSDI Application	<ul style="list-style-type: none"> Are there racial, ethnic, or cultural reasons why a potential applicant might not be taking psychiatric medications? Are there racial, ethnic, or cultural reasons why a potential applicant might not be receiving psychiatric treatment for their mental illness or medical conditions? Is there community stigma associated with mental illness or physical disability they are currently or have historically experienced? Does the potential applicant have significantly less access to psychiatric and/or medical treatment in their community that may be related to their race, ethnicity, culture, or socioeconomic status? Has the potential applicant been unable to access psychiatric and/or medical treatment due to their lack of income, lack of health insurance, and/or homelessness status? Before "screening out" a potential applicant who does not take psychiatric medications and does not yet have obtainable medical evidence, can you employ any outreach strategies that may assist this potential applicant with accessing this treatment or an assessment for their illness(es)/condition(s)?

SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance Center

November 2021






Identifying SOAR Applicants: Adults

This tool is intended to help case workers identify adults who are experiencing or at risk of homelessness who may be eligible for Social Security Administration (SSA) disability benefits. While we do not want to discourage anyone from applying for SSA benefits, this tool should help you identify individuals that most need your assistance with their SSI/SSDI application.

SSA defines adults as persons 18 years of age or older as well as individuals who are within one month (180 days for youth who are aging out of the foster care system) of their 18th birthday. Individuals aged 65 or over with low income and resources may be eligible for SSI based on age or eligible for retirement benefits based on their work history. (Individuals aged 62-67, depending on year of birth, may be eligible for early retirement benefits).

Key Eligibility Criteria: *The following 4 characteristics represent key eligibility criteria for SSA disability benefits*

- Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affects their ability to work at a substantial gainful level (\$1,350/month in 2022)
- Illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)
- Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevent sustainable employment. For example:
 - Psychotic Symptoms (hallucinations, delusions, disorganized thinking/speech/behavior)
 - Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)
 - Manic Symptoms (racing thoughts, disorganized thoughts)
 - Anxious feelings (paranoia, nervousness)
 - Cognitive deficits (brain injury, problems with concentration, memory, etc.)
 - History of trauma (history of abuse, posttraumatic stress disorder, etc.)
 - Other: _____
- For applicants with mental illness, they have marked restrictions in at least 2 of these functional areas, or extreme limitations in one area:
 - Understand, remember, or apply information (memory, follow instructions, solve problems, etc.)
 - Interact with others (getting along with others, anger, avoidance, etc.)
 - Concentrate, persist, or maintain pace (as they relate to the ability to complete tasks)
 - Adapt or manage oneself (hygiene, responding to change, setting realistic goals, etc.)

SOAR Recommends: *The following characteristics are not essential, but may strengthen an application*

- Applicant is prescribed and takes psychiatric medications and continues to experience symptoms and functional impairments.
- Applicant has obtainable medical evidence (for at least part of the past 12 months) that corroborates mental illness and medical conditions. Limited medical evidence or large gaps in treatment is normal and acceptable for successful applications. Assess whether the:
 - Applicant's symptoms are severe enough that a one-time examination by a physician would provide clear medical evidence
 - Representative can write a Medical Summary Report that illustrates a link between the applicant's diagnoses and their symptoms and functional impairments
- Applicant is not working or is working below SGA due to medical and/or psychiatric conditions (i.e., not because they cannot find work or were laid off)
 - History of failed work attempts (started and stopped employment due to diagnosed conditions)
 - Long work history, but can no longer work up to SGA (\$1,350/month in 2022) due to conditions
 - Scattered work history due to conditions and other factors

SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance Center

November 2021

Source: Reducing Implicit Bias and DEI Considerations for Identifying SOAR Applicants

What We've Learned at COHHIO

Start internally

Don't assume anything

Continual self-work

Be intentional

Challenge and address white dominant culture

Talk is cheap

It's a marathon

Center equity

Practice Cultural Humility

Don't be afraid to try

Lean into discomfort

Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

Josh Johnson

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www.cohhio.org/programs/racialequity

www.cohhio.org/programs/soar-ohio

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)

Equity in Action: Maryland SOAR Initiative

Caroline Bolas

Consultant/Director: SOAR Initiative
Initiative of Maryland Department of
Health Behavioral Health Administration

March 24, 2022



SAMHSA
Substance Abuse and Mental Health
Services Administration

Background

Our commitment to providing equitable services via:

- Maryland Department of Health, Behavioral Health Administration Behavioral Health Equity Workgroup and Policy and Procedures Workgroup
- National SOAR TA Center Expert Panel Workgroup
- Maryland SOAR Equity Committee

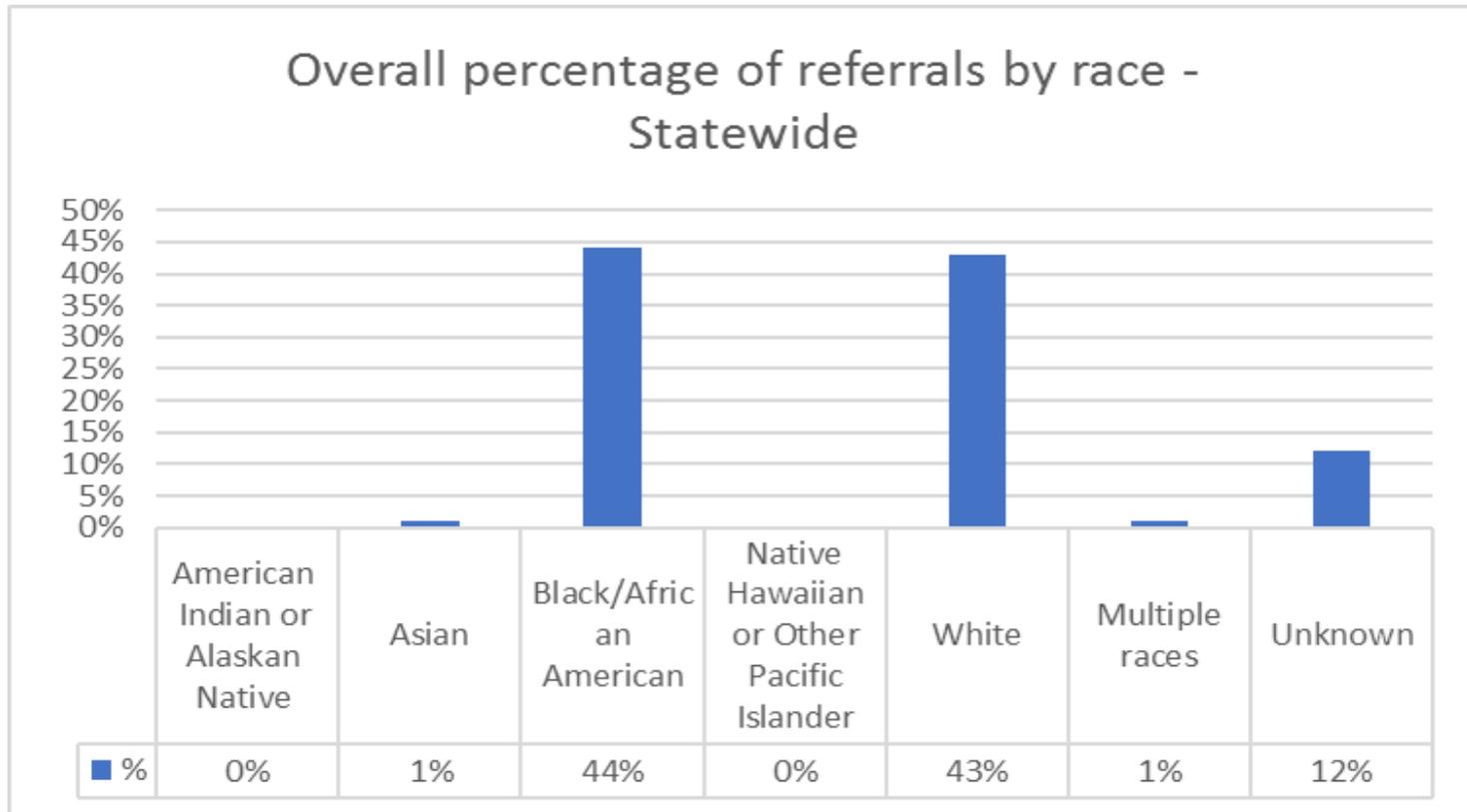
Questions to be Addressed

- Are SOAR Specialists receiving referrals representative of the communities we serve?
- Out of the referrals received, are there any differences based on race and ethnicity in terms of who is accepted as a SOAR applicant and who is not?
- Are there are any differences based on race and ethnicity in terms of approval and denial rates?

Question 1: Community Referrals Received

- Data was collected on the race and ethnicity of all potential applicants referred to our community SOAR Specialists
- This data was analyzed at both state and county level
 - Firstly, looked at overall percentage of referrals in terms of race and ethnicity

Example of Data Analysis



Which Comparison Data to Use?

Multiple sources of comparison data used:

- Census data
- Data on individuals accessing mental health services from Maryland's Public Behavioral Health System
- Point in Time (PIT) data

Action Steps

- Sharing county level data with local SOAR teams
- Developing community action plans
 - Seeking to develop more diverse community partnerships, including faith based
 - Distributing SOAR National TA center key SOAR documents that have been translated into Spanish
 - Seeking to employ more bi-lingual staff
 - Sharing SOAR data with existing equity committees in their local communities

Question 2: Acceptance of Referrals

- Analyzed referral acceptance by race and ethnicity at state and local level
- Findings:
 - Out of the 155 referrals accepted, 50% identified as Black/African American and 46% as White
 - Out of the total 180 potential Black/African American applicants, 49% were accepted and 44% of the 176 potential White applicants were accepted
 - Out of the 155 referrals accepted, 95% identified as Non-Hispanic/Non-Latino
 - Out of the total 359 potential Non-Hispanic/Non-Latino applicants, 41% were accepted
 - 50% of all potential Hispanic/Latino applicants were accepted

Reasons Why Referrals Were Not Accepted

- Analyzed reasons given for not accepting a referral by race and ethnicity at state and local level
- Although a number of reasons were provided, the overall top reason (28%) given was:
“Insufficient treatment history”
 - This did seem to impact more applicants of color than white applicants

Action Steps to Address Inequities:

- Sharing relevant SAMHSA SOAR TA Center documents such as “Identifying SOAR Applicants – DEI” and “Reducing Implicit Bias in the MSR”
- Arranging for Yvonne Perret, one of SOAR’s founders, to work with our SOAR Specialists to help build case development skills

Action Steps: Local Action Plans

- Discussed reasons for referral non-acceptance at county level and agreed upon local action plans including:
 - Educating referring providers about key SOAR eligibility criteria and when to refer
 - Adding to the referral form additional 3rd party contact information to help contact potential applicants

Question 3: Approval and Denial Rates

Compared overall approval rate (85%) for all SOAR claims (initial and appeals) with rates broken down by race and ethnicity as follows:

- Black applicants – 89%
- White applicants – 80%
- All other racial groups – 100%
- Hispanic/Latino applicants – 83%
- Non-Hispanic/Non-Latino 86%

Reasons for Denials

Reasons for denials were analyzed:

- Only 28 denials in FY 21, data set is limited
- Look to build up data sets year on year
- Chief reason for denials for all races were:
 - Ability to do past or other work (Steps 4 and 5)

Thank You

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Equity in Action: BEST/Central City Concern

Kascadare Causeya, MBA
Program Manager, BEST
Central City Concern, Portland, Oregon
Substance Abuse and Mental Health Services Administration
U.S. Department of Health and Human Services

March 24, 2022



SAMHSA
Substance Abuse and Mental Health
Services Administration

BEST/CCC Training of Direct Service Personnel

- Equity and Inclusion should not only be practiced from the top down, but also from the bottom up!



Middle and Upper Management

- Leadership can make DEI more effective if/when they take a BOLD stance for it, and equally as bold a stance against those who are against it!



Organizational Look

- Assess the current organizational DEI culture
- Identify indicators of success
- Focus on relevant topics for DEI training
- Incorporate small changes for a big impact
- Implement DEI initiatives at all levels within an organization

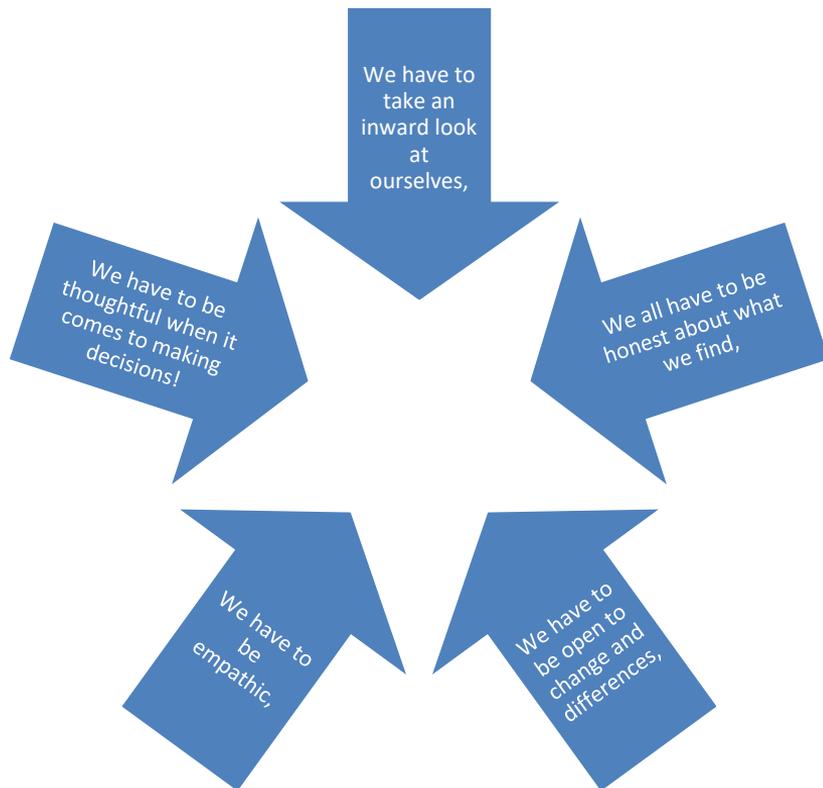
All of Us

Regardless of who is taking the stand, for it to be effective, it starts with each of us!

We/I have to take that stance!



To Take That Stance Boldly, We/I...



Inward Look



"Being honest with yourself requires self-awareness and even courage. It can sometimes be challenging to make contact with your truth, and even harder to take action based on that truth. Honesty is a little threatening because it's so powerful. It's also transformational."

Dr. Lisa Marie Bobby

Cultural Diversity in the Workplace

13 Benefits and Challenges of Cultural Diversity in the Workplace

By: Katie Reynolds

<https://www.hult.edu/blog/benefits-challenges-cultural-diversity-workplace/>



A Conversation with Dennis

A BEST Program
Experience



Thank You

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Poll Question

- What does equity mean to you?
- Answers will be compiled for sharing with the SOAR community
- Share your name, initials, or stay anonymous if you'd like!

Questions and Answers

Please type your questions into the Q&A box.



Resources

SAMHSA's Behavioral Health Equity

- <https://www.samhsa.gov/behavioral-health-equity>

DEI Resource Library

- <https://soarworks.samhsa.gov/article/dei-resources>

American Public Health Association: Advancing Racial Equity Webinar Series

- <https://www.apha.org/events-and-meetings/webinars/racial-equity>

National Alliance to End Homelessness: Racial Equity Resources

- <https://endhomelessness.org/resource/racial-equity-resources/>

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Thank You

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