

SOAR Diversity, Equity, and Inclusion (DEI) Implementation Toolkit

PUTTING EQUITY TOOLS INTO ACTION

SOAR (SSI/SSDI Outreach, Access, and Recovery) providers engage with people from various backgrounds, cultures, and beliefs that may be different from their own. SOAR applicants may be people of color experiencing homelessness, substance use, poor health, limited education, past incarcerations and hospitalizations, and limited work experience. Ensuring equity in SOAR program implementation requires providers to consider how implicit bias in any of these areas may contribute to disparities in how SOAR services are accessed by and delivered to diverse groups. From hiring and supporting staff to identifying eligible SOAR applicants to writing a Medical Summary Report (MSR), there are many things to consider in the effort to encourage diversity, equity, and inclusion while assisting with Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) applications in work environments where SOAR providers can thrive.

Respecting and Supporting Staff

Hiring and Supervising SOAR Case Workers

The [Hiring and Supervising SOAR Case Workers Toolkit](#) provides information for SOAR program managers who are hiring for and supervising SOAR case workers. In recognition of the unique nature of SOAR positions, this tool offers helpful suggestions and key considerations for posting SOAR case worker positions, the interview process, including DEI-focused sample questions, and unique ways to evaluate the key competencies of a SOAR case worker. The toolkit also addresses pay equity for SOAR providers and guidance on integrating DEI in SOAR work and improving staff engagement.

Putting It into Action



The North Carolina SOAR leadership team at the North Carolina Coalition to End Homelessness uses the Hiring and Supervising SOAR Case Workers guide regularly. SOAR Leadership shares this tool with any program that is considering developing SOAR positions, as well as in proposals to funders. Sarah Murray, former SOAR State Team Lead, shared, “It is an excellent, comprehensive guide on considerations both for hiring and for structuring SOAR positions. We especially appreciate the DEI considerations included in the guide. They prime conversations for reducing bias in the hiring process to ensure that the pool of SOAR case managers in our state reflects the diversity of the people we serve. In addition, it provides examples of questions for gauging candidates' understanding of DEI in SOAR work. As our state moves towards greater commitment in equitable SOAR access and outcomes, it is important to bring new case managers on board who share this vision. We are grateful to have some concrete tools and suggestions for deepening our DEI work in hiring and supporting SOAR case managers in North Carolina.”

Guidance for Improving Staff Engagement - Integrating Diversity, Equity, and Inclusion in SOAR Work

[Guidance for Improving Staff Engagement](#) encourages conversations with staff that serve Black, Indigenous, and people of color (BIPOC). This resource can be used to strengthen engagement practices that minimize bias with individuals we serve and improve staff relationships and workplace wellness. It is a resource that may be helpful in an agency's effort to address inequity, strengthen workplace support and safety for all team members and establish a foundation of safe places within the workplace that can be extended to the people we serve (both physically and emotionally).

Putting It into Action



Kascadare Causeya, BEST Program Director at Central City Concern (CCC) in Portland, Oregon, reports, "At Central City Concern's BEST Program, we are intentional about diversity and inclusion. We are aware of the damage discrimination can have on employees, staff work performance, [program participants], and community morale. During the interview process, candidates are asked questions about their work experience with and/or for diverse groups of people." After hire, we again tell the new employee of CCC's commitment to equity, and inclusion, and encourage all employees to be willing to engage in difficult conversations with co-workers for better understanding of each other. We encourage employees to take the time to educate themselves about other races, cultures, ways of life, and ways of thinking that have historically been different from their own orientation in life."

SOAR Leadership at CCC emphasizes the importance for new employees to recognize personal biases, and the importance of treating each person equitably and with compassion and consideration. Kascadare states, "Too often, well-established teams take the view that a new person must fit in with the team, to a point that's true, but equally as true is that each team member must fit in with the new person coming into the team. Committing to diversity, equity, and inclusion is an ongoing process and must be supported by leadership down and then by entry-level staff up! It is my belief that the more diverse the workforce, the better we are positioned to address any contingency that could arise."

Pay Equity for SOAR Workers

Pay equity between individuals doing the same work is an essential principle of fairness, and individuals should be compensated equally without regard to gender, race, ethnicity, age, sexual orientation, marital status, immigration status, or physical ability. Information about pay equity for SOAR case workers can be found in the [Hiring and Supervising SOAR Case Workers Toolkit](#).

Putting It into Action



Nebraska provides state funding for SOAR-dedicated positions in 6 regions throughout the state. Historically, this funding has consisted of a set \$40,000 annual allotment for agencies to fund a SOAR case worker. In 2022, state leads determined that a \$40,000 stipend could not provide equitable compensation and benefits for a full-time position. To increase pay equity for SOAR case workers, the state changed Notice of Funding Opportunity (NOFO) guidelines to emphasize that this \$40,000 award was meant to supplement agency funds for a dedicated SOAR position. As a result of this guidance, agencies use other funding streams to ensure equitable pay and benefits for SOAR case workers.

Equitable Case Acceptance

SOAR Referral Process Workflow Toolkit

The [SOAR Referral Process Workflow Toolkit](#) will help you to develop a SOAR referral process for your community or agency that helps ensure that potentially eligible individuals are connected with SOAR-trained providers who are available to assist. Case workers trained in the SOAR process are expected to complete the outlined steps. This process is meant to facilitate SOAR referrals that are appropriately submitted and assessed. Fidelity to this process will help to ensure equitable access to SOAR services along with strong outcomes.

Putting It into Action



The SOAR State Planning Group in Maryland formed a Race and Ethnicity Committee to review data on referral acceptance by race and ethnicity. A report was prepared for the State Planning Group, and the SOAR State Team Lead shared local data with the relevant Local Leads. The State Planning Group discussed reasons that there may be disparities in referral acceptable. The group discussed the issue of not accepting referrals due to insufficient treatment history and how SOAR principles could be used to build a robust case for those applicants. The Race and Ethnicity Committee committed to discussing the issue further.

Cultural Considerations for Identifying Applicants

Identifying SOAR Applicants

Guidance included in the [Identifying SOAR Applicants](#) tool 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 case worker's and/or agency's decision to assist them with a SOAR-assisted SSI/SSDI application. Included are helpful tips to consider when utilizing the *Identifying SOAR Applicants* tool.

Putting It into Action



Co-State Team Lead, Kate Baasch of Bread for the City in Washington, DC identified a bias point and gap in "screening" practices and wanted to offer a new framework to think about identifying applicants. The organization decided to replace the word "screening" and received a commitment from the SOAR provider community to think about screening as **developing cases** moving forward.

Kate shared, "*Screening* comes with the connotation that maybe someone already isn't qualified, or you must do something to get in, and we have a gate to keep. Let's blow that gate up so we can make sure people can reach us, and we can figure out how to help. Always be thinking of screening as developing cases, and if we can't help someone apply for SSI/SSDI now, what **can** we help with? What's the next development step we can do to **make access**? What's the long-term goal and what are the short-term things we can do now to be building the case and supporting the [program participants]?"

Reducing Implicit Bias when Documenting Disability

Medical Summary Report (MSR) Interview Guide

The [MSR Interview Guide](#) provides sample questions and guidance for gathering information necessary for the SSI/SSDI disability determination process. Guidance within this tool 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 toward the applicant's functioning.

Reducing Implicit Bias in the Medical Summary Report (MSR)

[Reducing Implicit Bias in the MSR](#) includes 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.

MSR Review: Effective and Ineffective Writing Descriptions

[Effective and Ineffective Writing Descriptions](#) can be used as a training activity to illustrate the difference between an MSR that contains biased language and tone that can influence unconscious bias by the reader and a more effective MSR written with descriptive and objective language resulting in a more effective representation of the applicant's experience and limitations in functioning.

Putting It into Action



In March 2023, the Coalition on Homelessness and Housing in Ohio SOAR Coordinator, Erica Copley, facilitated training for SOAR providers across the state targeted at improving the Medical Summary Report (MSR) and functional information using Effective and Ineffective Writing tools to reduce the impact of implicit bias. Erica used sample MSRs to challenge the use of language that revealed unconscious bias by the writer and used a group activity to illustrate the importance of descriptive language that is respectful of the applicant's experience to create a more effective MSR and functional report. Erica states, "Using words and phrases like, "probably," "barely worked," "claimed to be sick," or "claims to never have used substances," is the opinion of the writer. This can promote implicit bias. Our words have Power! Use the language of an advocate – not an adversary and provide information from the applicant's point of view."