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| **Goal 1: Training Practitioners and Completing Applications** | | | |
| Build and sustain community capacity to implement SOAR and increase access to adult SSI/SSDI and child SSI benefits for individuals experiencing or at-risk for homelessness, with a target on children, families, Veterans, and chronically homeless individuals. | | | |
| **Measurable Objective** | **2023** | **2024** | **2025** |
| **Increase the number of adult SSI/SSDI applications per year**  **Increase the number of child SSI applications per year** | **50/yr.**  **25/yr.** | **75/yr.**  **40/yr.** | **100/yr.**  **55/yr.** |
| **Increase the quality of adult SSI/SSDI applications**  **Increase the quality of child SSI applications** | **70%**  **70%** | **74%**  **74%** | **78%**  **78%** |
| **Increase the number of trained and active SOAR adult providers**  **Increase the number of trained and active SOAR child providers** | **4**  **2** | **6**  **4** | **10**  **8** |
| **Action Steps** | **Lead Person** | | **Timeframe** |
| Priority 1:   * Identify the right staff to train   + Talk with community partners who are working with individuals experiencing homelessness   + Schedule meeting with school social work supervisor   + Reach out to PATH and other homeless outreach teams   + Meet with identified staff and supervisors before training to answer questions and ensure they can dedicate sufficient time towards SOAR   + *Review Expectations for SOAR Providers* * Provide standardized SOAR training   + Establish a timeline for the completion of training   + After SOAR trainees complete SOAR Online Course, follow up with in-person SOAR Online Course Review Session   + *Use SOAR Online Training Cohort and SOAR Online Course Review Session* *resources.* * Standardize a process for identifying SOAR applicants and referral form for SOAR collaboration   + Identify any assessments or tools that staff already use that could help identify and prioritize SOAR candidates (e.g., common intake forms, etc.)   + Create interagency SOAR referral form and a “warm hand off” mechanism to promote collaboration     - Establish how referrals will be made and received, and standards for length of time between receiving and interviewing SOAR referral.   + *Use the Identifying SOAR Applicants tool and Multi-Agency Release Form* * Use Point-in-Time count data to help identify needs and target populations |  | |  |
| Priority 2:   * Create a quality review team who can assist with application questions and review redacted MSRs to ensure that applications are complete and high-quality   + Invite SAMHSA SOAR TA Center Liaison to participate   + *Use SOAR Application Checklist*   + *Use the SOAR Quality Review Checklist* * Identify ongoing training needs and hold regular continuing education for SOAR practitioners |  | |  |

**Sample SOAR Action Plan for a Continuum of Care (CoC)**

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| **Goal 2: Collaborations** | | | |
| Develop and strengthen partnerships with SSA/DDS, medical and education providers, and community organizations to increase efficiency in processing SOAR-assisted applications. | | | |
| **Measurable Objective** | **2023** | **2024** | **2025** |
| **Identify and meet with SSA and DDS liaisons, either in-person or virtually, to obtain feedback** | **4 mtgs./year** | **6 mtgs./year** | **Monthly updates** |
| **Increase % of MSRs with doctor’s co-signature** | **35%** | **50%** | **65%** |
| **Increase timely access to medical and education records for SOAR applications (measured by % of records obtained within 4 weeks of request)** | **25%** | **50%** | **75%** |
| **Reduce the number of days to decision for SOAR-assisted applications** | **120** | **100** | **90** |
| **Action Steps** | **Lead Person** | | **Timeframe** |
| ***SSA and DDS*** | | | |
| Priority 1:   * Establish SSA and DDS SOAR liaisons within 6 months   + Locate SSA and DDS offices, schedule a meeting to introduce SOAR, create a relationship within at least one person (face to face if possible) |  | |  |
| Priority 2:   * Invite SSA and DDS liaisons to SOAR steering committee within first year. * Increase number of meetings, either virtual or in-person, each year to solicit feedback on SOAR process and quality of SOAR applications.   + As initiative progresses, monthly updates can take the form of virtual updates on progress and any challenges that have arisen |  | |  |
| ***Medical Providers*** | | | |
| Priority 1:   * Provide outreach to doctors about SOAR and co-signatures on MSRs   + Schedule meetings with doctors at local health clinic and mental health center. Present “SOAR Orientation” at a lunch meeting.   + *Share the What Medical Providers Need to Know document* * Create list of current clinic and hospital medical records contacts at both adult and child facilities to share with SOAR providers   + Establish relationship with key medical records contacts.   + Reach agreements to obtain timely records for SOAR for free |  | |  |
| ***Other*** | | | |
| Priority 1:   * Have a community meeting with stakeholders who weren’t at the forum to introduce them to SOAR and its benefits   + *Share SOAR Overview document, SOAR process video, and Class 1 from the SOAR Online Course as resources*   Target stakeholders where eligible populations gather: libraries, free clinics |  | |  |
| Priority 2:   * Establish MOUs/formal agreements/collaborative agreements with agencies to assist with SOAR and invite key stakeholders to join SOAR steering committee   + *Consider the SOAR MOU or Memo to Program Directors as template tools*   *Use the Steering Committee Tools packet for sample materials.* |  | |  |
| **Action Steps** | **Lead Person** | | **Timeframe** |
| ***Child Serving Agencies*** | | | |
| Priority 1:   * Establish contacts at local school districts for both access to education records and school social workers for application assistance |  | |  |
| Priority 2:   * Reach out to counseling staff at the local juvenile justice facility to establish process for accessing records and accepting referrals * Contact the local Department of Children and Families social work supervisor * Establish a contact with the court CASA liaison |  | |  |

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| **Goal 3: Tracking Outcomes, Funding and Sustainability** | | | |
| Maximize resources to sustain SOAR dedicated benefits specialists and facilitate the collection and evaluation of complete, timely data on SOAR cases. | | | |
| **Measurable Objective** | **2023** | **2024** | **2025** |
| **Increase number of SOAR dedicated benefits specialists (measured in FTE and PTE positions)** | **1 FTE and 2 PTEs** | **2 FTEs and 4 PTEs** | **3 FTEs and 6 PTEs** |
| **Increase % of SOAR trained providers entering timely data into OAT (measured by % of providers submitting SOAR data by the end of each month)** | **65%** | **75%** | **95%** |
| **Increase the number of providers tracking Medicaid reimbursements** | **1 provider** | **3 providers** | **5 providers** |
| **Action Steps** | **Lead Person** | | **Timeframe** |
| Priority 1:   * Register and train providers on using the SOAR Online Application Tracking (OAT) program   + Ensure all SOAR-trained providers are registered after training   + *Use OAT tutorials on entering data and running reports* * Establish expectation that providers will enter data into OAT by the end of each month.   + For those who are entering data late into OAT, provide extra training and/or meet with supervisor   + Use outcomes for supervisory and quality feedback * Evaluate progress on outcomes monthly   + Identify our CoC baseline outcomes   + Identify who will track CoC-wide data in OAT and share reports with partners |  | |  |
| Priority 2:   * SOAR steering committee agencies will evaluate resources (staff time or funds) they can allocate to SOAR   + Reallocate positions to 1 FTE and 2 PTE SOAR dedicated positions in first year * Identify sources of new funding for expansion of SOAR dedicated positions   + *Utilize SOAR Best Practices on Funding and Sustainability* to explore funding possibilities   + Consider social work intern program at the VA or local university   + Explore community organizations outside of SOAR steering committee, including faith-based agencies, schools, and hospitals * Use cost savings studies to promote SOAR |  | |  |

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| **Goal 4: Local Leadership Team** | | | |
| Build a strong Leadership Team and steering committee to guide SOAR operations and structure, and address issues or challenges that arise with SOAR implementation. | | | |
| **Measurable Objective** | **2023** | **2024** | **2025** |
| **Ensure active attendance at each SOAR steering committee meeting, either virtually or in-person (measured by percent of membership)** | **70%** | **75%** | **80%** |
| **Ensure active attendance at Leadership Team meetings, either virtually or in-person (measured by percent of membership)** | **75%** | **80%** | **85%** |
| **Action Steps** | **Lead Person** | | **Timeframe** |
| Priority 1:   * Create a 5 member Leadership Team to guide SOAR operations and structure   + Designate a Local Lead   + Outline expectations and roles and responsibilities   + *Use SOAR Local Team Lead and Planning Team Suggested Roles and Responsibilities* * Establish plan to hold quarterly Leadership Team meetings and to attend steering committee meetings |  | |  |
| Priority 2:   * Create a SOAR steering committee, which will be a coalition of community agencies involved in and supporting SOAR   + Determine key partners with sub-populations represented   + Identify who is best in each agency to be on steering committee   + Provide outreach to agency about SOAR and benefits of being involved in steering committee * Establish plan to meet monthly, either virtually or in-person   + Use the meeting to report on status of action items   + Address challenges to SOAR implementation   + Invite presentations on key related topics (e.g. partner agency service availability) |  | |  |
| Priority 3:   * Establish a SOAR case manager working group that would support active practitioners and provide feedback to the steering committee on systems level issues   + Once SOAR training begins in CoC, invite all trained case managers to working group to address issues and challenges   + Local SOAR lead or trainer will facilitate working group at least every other month |  | |  |

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| **When** | **Our Monitoring Plan** |
| **Monthly** | Lead person(s) for each priority area will update status of action items to ensure we are making progress. This update will take place during a monthly SOAR steering committee meeting, or virtually if the lead is unable to attend. The steering committee lead will compile updates and send a performance update to all members of the committee. |
| **Quarterly** | The Leadership Team will meet to review status of action steps and progress on objectives. The team will decide which current strategies to continue or stop and what new strategies to start. The team will adjust objectives as warranted based on issues and priorities. |
| **Annually** | The Leadership Team will meet to review progress for the year, identify what is working well and any new challenges, change objectives, and re-establish priorities and action plans. |