**Sample SOAR Proposal with Budget**

**Invest $##### in SOAR to help people who have serious disabilities and cannot work**

**get Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI)**

**SSI/SSDI Outreach, Access, and Recovery (SOAR)** is a national project that is designed to increase access to SSI/SSDI and Medicaid/Medicare for eligible adults who are homeless or at risk of homelessness and have a mental illness and other co-occurring disorders. SOAR is a Promising Practice recognized by the Substance Abuse and Mental Health Services Administration (SAMHSA).

Accessing these income and health care benefits are a critical first step to help stabilize a person’s life.

**Without assistance, few people obtain SSI/SSDI even though they have a serious disability.**

* The SSI/SSDI application process is complicated and difficult to navigate, especially for people who are homeless and have a mental illness or other disorders that impair cognition.
* Nationally, fewer than 15 percent of homeless individuals who apply for SSI/SSDI are approved on the initial application, despite most being eligible for the program.
* When applications are denied, appeals can take an average of *one year* to complete, and in that time applicants often give up hope.

**SOAR works and brings resources to communities!**

* All 50 states use some form of SOAR.
* In 2023, SSI/SSDI for the individuals served by SOAR brought over $717 million into the economies of participating states and localities.
* The SOAR approach helps individuals receive SSI/SSDI faster on their initial application.
	+ In Tennessee, 96% of applicants supported by SOAR successfully obtained benefits in an average of two months compared to months or years without assistance.

**Strengthening the SOAR program in YOUR STATE**

Currently, the District offers trainings for local social service providers on how to implement SOAR. However, utilizing this model is time intensive and far less effective without full time staff dedicated to this task.

An investment of $580,000 would allow the District government to contract with a provider to hire full-time SOAR staff to be stationed across the District.

In the first year of funding, this investment could help over 100 homeless individuals with the initial SSI application, so they receive SSI and health insurance quickly and successfully the first time. If the SOAR funding continued in future years, the staff would be able to increase their number of cases by year 2, since they will be fully trained. We estimate that experienced SOAR workers can complete around 40-50 cases/year.

**SOAR Outreach Program Proposal**

**Purpose**

* To increase access to SSI/SSDI and Medicaid/Medicare for eligible adults who are homeless or at risk of homelessness and have a mental illness and other co-occurring disorders.
* To better assist people who apply for Interim Disability Assistance (IDA) receive SSI/SSDI benefits.

**Target Population**

* Individuals who are homeless or at risk of homelessness and have a mental illness and other co-occurring disorders

**Program Summary**

SOAR has been implemented in various ways across the country. One model that has been proven successful in other jurisdictions, such as Tennessee, is an outreach model. Using this model, a homeless outreach team trained in SOAR meets with individuals who are homeless on the streets, in shelter, and in institutions like jail, providing intensive assistance and support with the SSI or SSDI application process. This assistance ensures that the individual successfully receives Social Security quickly with the initial application.

Ideally outreach workers identify and work with people before they have applied for SSI or SSDI. However, an outreach worker could also get referrals from the Interim Disability Assistance program to provide additional assistance to people who meet the eligibility requirements of SOAR.

If funding is identified, the YOUR STATE Government could contract with a private provider to create a SOAR Outreach Team.

**Staff**

An outreach model typically consists of a licensed clinical supervisor and bachelor’s level outreach workers. One possible option for the District consists of a staff of seven with one additional support staff at DHS. This includes: One Homeless Outreach Supervisor, one SOAR Facility Liaison, three SOAR Coordinators doing outreach, one SOAR Coordinator taking referrals from the IDA program, and one lawyer.

The **Homeless Outreach Supervisor** supervises SOAR Coordinators and SOAR Facility Liaison. The supervisor will fill in on completing SOAR Claims or outreach as needed for coverage. This person is a licensed clinical social worker, whose opinions carry greater weight at the Social Security Administration. In addition, this person will ensure the team is collecting good data to report program outcomes.

The **SOAR Facility Liaison** conducts SOAR screenings with individuals who are currently in a facility (jail, prison or mental health hospital) who were experiencing chronic homelessness prior to their incarceration or hospitalization. The screening takes place at least 90 days prior to their release from the facility. If the individual is determined to be eligible for Disability Benefits through Social Security, the application will be filed as a Pre-Release case.

The **SOAR Coordinators** complete SOAR screenings with individuals who are currently experiencing chronic homelessness. The Coordinators meet the individuals where they feel comfortable whether it be in their campsite, under a bridge or in a shelter. SOAR Coordinators and SOAR Facility Liaison typically work with 2-4 individuals a month and apply on average 1-3 a month.

The **IDA SOAR Coordinator** takes referrals from the Interim Disability Assistance program to assist people who are homeless or at risk of homelessness who have a mental illness and other co-occurring disorders and need additional assistance to successfully receive SSI or SSDI.

The **Lawyer** helps to identify law firms to provide pro-bono legal assistance to IDA or SOAR applicants in the appeals process. In addition, a lawyer represents appeals cases, and provides technical support on SSI/SSDI applications.

A **DHS Support Staff** helps coordinate referrals from the IDA program to SOAR assistance or to pro-bono legal assistance. In addition, the DHS support staff would help to monitor the SOAR program.

**Evaluation**

The SOAR Outreach Program could use the free SAMHSA SOAR Online Application Tracking tool to track and report program outcomes quarterly.

**Budget Estimate**

Funding for a SOAR program in YOUR STATE could cost approximately $######.

\*\*\*Adjust numbers to reflect your community’s average salary, etc.\*\*\*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Line Item** | **Cost Per Item** | **Number of Items** | **Total Budget** | **Line Item Detail** |
| SOAR Specialist  | $35000 | 5 | $175000 | BA-level staff |
| SOAR Supervisor | $45000 | 1 | $45000 | LCSW  |
| Lawyer | $70000 | 1 | $70000 |  |
| DHS staff | $45000 | 1 | $45000 |  |
| Benefits | $67000 |  | $67000 |  (20%) |
| Total Personnel |  |  | $402000 |  |
| Tablets/Phones | $800 | 7 | $5600 | one-time, start-up expense |
| Commercial Copier/Printer/Fax | $1500 | 1 | $1500 | one-time, start-up expense |
| Desktop Computers | $500 | 7 | $3500 | one-time, start-up expense |
| Office Supplies | $600 | 7 | $4200 | $50/mth per staff |
| Equipment Maintenance | $600 | 7 | $4200 | $50/mth per staff |
| Data Plans | $1200 | 7 | $8400 | $100/mth per staff for phones/tablets |
| Occupancy | $12000 | 1 | $12000 | one office @ $1,000/mth |
| Staff Travel | $1800 | 7 | $12600 | $150/mth per staff  |
| Staff Professional Development | $500 | 7 | $3500 | staff training |
| Client Engagement | $1200 | 7 | $8400 | $100/mth per staff  |
| Grand Total |  |  | $461,700 |  |

***For questions regarding the proposal contact:***

YOUR CONTACT INFO