

CT Outreach (OR) Training

Best Practices in Outreach to Homeless People

Session #3: Transition to Housing and Tools and Supports for Practice

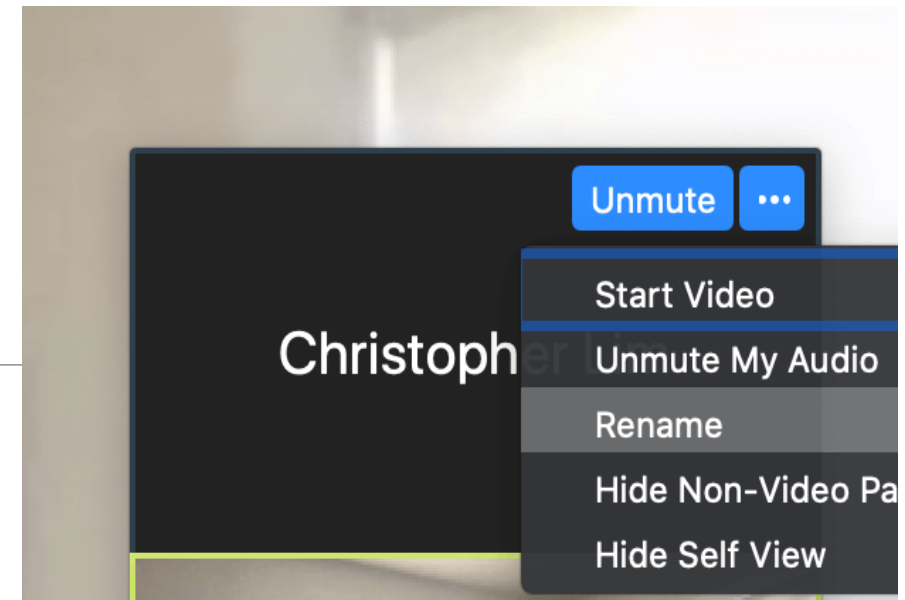
3/31/2026

Suzanne Wagner & Andrea White, Housing Innovations



Welcome

- Introduce Facilitators
- Goals for the Session
- Housekeeping
 - PLEASE TURN YOUR CAMERAS ON AS MUCH AS YOU CAN.
 - Please put your name as you would like to be addressed as your screen name.
 - We will upload the slides to the chat box momentarily.
 - We love interaction – please raise hand, use emojis, type comments in the chat box or just unmute and talk!
 - The session is being recorded and will be posted to the web.
 - Today's session is 2 hours- some slides are for reference.



We Love Interaction

If you don't have a microphone, participate in discussions by joining via phone:

- Phone: 646-876-9923
- Meeting ID: 844 5428 2209
- Passcode: 185525

Who is with us today?

Please put in the chat box:

- Your agency and role/title
- Your location
- Best movie or show you recently watched



Zoom Polls

How long have you been in your current position?

How much experience do you have in street outreach work?



Recap of Sessions 1 & 2

- CT Statewide Street Outreach Standards
- Outreach values, vision and goals
- Trauma-Informed and Client-Centered Practices
- Housing Focused Case Management
 - Assertive Engagement
 - Assessing Housing Needs
 - Goal-setting and Housing Planning
 - Sample Service Plan: Completed Sample
 - Accessing Resources

Polls: Previous Trainings and the Outreach Standards



AGENDA

- Accessing Housing
- Supporting the Transition to Housing
- Standards Discussion
 - Client Rights
 - Documentation & Data
- Case Notes
- Closing Comments
- Additional Resources

Accessing a Temporary Place to Stay



What are the options?

Shelter/Hotel/Motel?

Doubling up with friends/family?

What are the responsibilities?

How does it connect to what the person wants?

Housing Navigation



Choices that may be available:

- Rapid Re-Housing
- Permanent Supportive Housing
- Market Rate Rentals and Low-income Tax Credit Buildings
- Shared Housing
- Subsidized Housing such as Housing Authority Properties

Help clients to explore:

- What they are eligible for?
- What is the waiting time for each?
- What are the expectations in each?
- What are their individual preferences and non-negotiables?
- How do available options connect to long-term aspirations?



Review of sample framework for helping clients to evaluate housing options

[Housing Preferences Worksheet - DOC](#)

Webinar: Helping Clients to Understand Housing Options

Presentation slides:

[Understanding Housing Options – PDF](#)

Webinar recording:

https://youtu.be/NI_8EzpHEv4



The Transition to Housing

- Opportunity for change and a new start
- Both loss and gain
- Can increase symptoms
- Can triggers fears of failure
- Involves lots of unknowns
- Unknowns/uncertainty can create anxiety
- Requires a new daily schedule and role(s)



Transition Cases Discussions:

What are the challenges each person is facing as they adjust?

How would you address each situation?



Oscar has been outside or in shelters for years. He has a good set up for camping, has people he connects with, his favorite soup kitchen and you. He feels like he is getting too old for this life, everything hurts. He has agreed to housing and just moved in. He is miserable. He is lonely, he doesn't know how anything works in his house, his neighbors don't want to talk, everyone nags him and he is not having any fun. He is thinking about going back outside.

June moved into housing last month and promptly stopped taking her medication. She is now up all night and believes the neighbors are listening in on her apartment. She wants your help to retaliate against these nosy neighbors. June had talked to her housing case manager about the neighbors, but she doesn't seem to be doing anything about it, she doesn't seem concerned. She wants you back, you are the only one who helped her.

Support During Housing Application & Move-In

- Participate in CAN Case Conferencing and Matching meetings
- Prepare and support clients for success:
 - Teach tenancy rights and responsibilities.
 - Anticipate housing stability risks and help clients establish plans to mitigate risks.
 - Assist to set up the apartment to feel like home.
 - Help plan how client will structure their initial days in housing.
 - Offer support post move-in for 90 days post lease date – may keep enrollments open
 - Do warm handoffs with new providers



Warm Hand-offs



- Leverage outreach workers' deep ties to transfer engagement to the new worker
 - Accompany clients to appointments with new service providers whenever possible
 - Clarify roles with housing case manager or other ongoing support staff
 - Decide who will do what – e.g., PSH will lead on communication with landlord, Outreach can support with connections to new resources
- Provide follow-up support on a gradually declining basis post move in to housing
 - *Standard: monthly attempts to visit or contact clients after move-in to assess on-going service needs and connect clients to appropriate services for at least 3 months after move-in*

Poll: Warm Handoffs

Connecticut Statewide Street Outreach Standards

For projects serving people
experiencing unsheltered
homelessness funded by
CT Department of Mental Health
and Addiction Services,
CT Department of Housing,
CT Balance of State Continuum of Care

UPDATED APRIL 2025



CT Statewide Street Outreach Standards

Content:

- Vision, Values, Outcomes
- Practice Standards for Outreach Workers
- Supervisory Standards
- Project Standards for Program Managers
- Standards for Agencies
- Outreach Plan Template
- Assessment and Service Plan Template
- Tools and Checklists

Standards Re: Respecting Clients' Rights

Outreach workers must operate in ways that respect each client's right to confidentiality, to make grievances, and to decide how and when their personal information is disclosed. Staff must do the following for all clients:

Adhere to **confidentiality** requirements:

- During discussions with clients, colleagues, collateral contacts
- Obtain a signed release of information to authorize disclosures
- Obtain an HMIS release to authorize data entry
- Ensure written records are properly stored

Inform clients of the right to use your agency's **grievance** process

For more information see:

- Your agency's **confidentiality** and **grievance** policy and procedure





SNOFO Outreach Projects CT BOS Rights Notices

SNOFO Outreach Projects must provide participants with these CT BOS Rights Notices:

- Participant Rights Notice (English)
 - Includes Participant Rights, Emergency Transfer and Grievance Notice
- Participant Rights, Emergency Transfer Notice, Grievance Rights (Spanish)

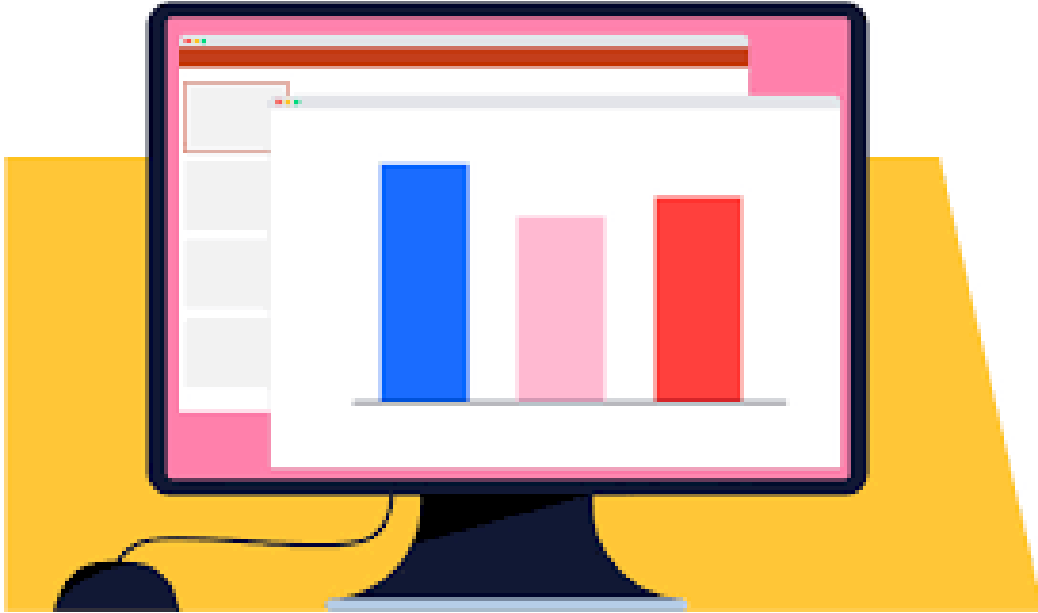


DOCUMENTATION AND DATA

Why is documentation important?



- To ensure no one falls through the cracks and everyone has someone checking in with them.
- To establish an agreement about what you are working on together and what you are going to do by when.
- To track what you agreed to do and ensure it's done promptly.
- To ensure every person is prioritized and connected to housing as quickly as possible and inform continuous quality improvement.
- To conserve scarce resources and avoid service duplication.
- So other people can find your clients, know something about them and what you were working on in case you cannot continue to provide services.



Zoom Poll

Which of these reasons to keep documentation current seems most important to you?

Pick up to 4

Documentation Standards

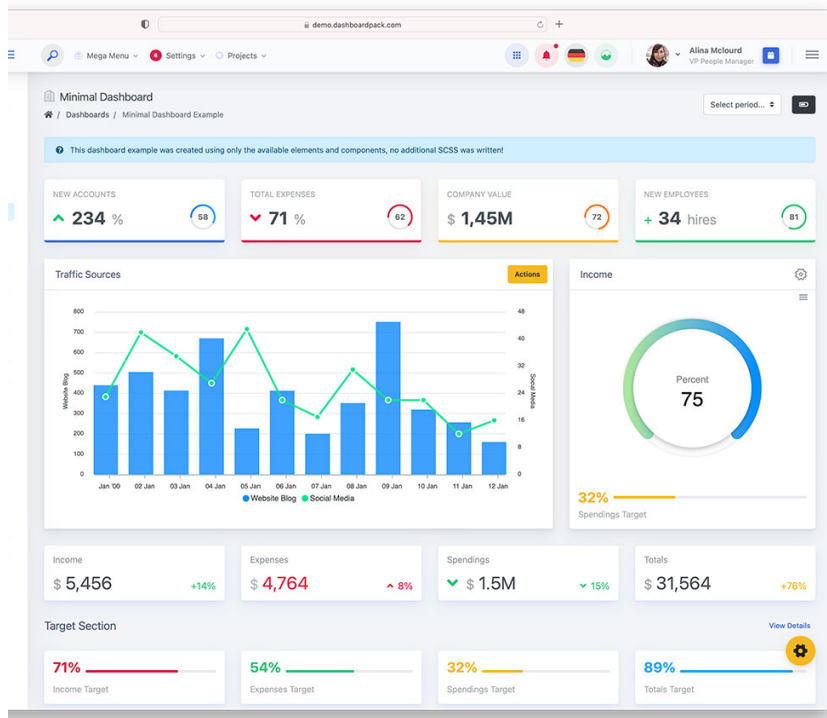


- Use HMIS to record information about all enrolled clients – must have ROI
- Enter information including project entry/exit dates promptly (goal: within 24 hours)
- Complete enrollment and exit assessments in HMIS
- Update HMIS CLA's (current living assessment) - at a minimum monthly
- Case notes document ongoing services for all enrolled participants and work towards housing
- Homelessness Verification Form, Current Living Assessment and/or Letter documents homelessness - if doing CLA's should be able to stop doing letters
- For participants with a disability, Verification of Disability or attempts to obtain are in file

Data Systems - Quick Reference – All Outreach Projects

Data System	Purpose	Who to Contact for Help
<u>HMIS-Caseworthy</u>	CT's Caseworthy database where providers enter data for every Outreach project participant	<u>help@nutmegit.com</u> <u>CT HMIS Knowledge Base</u>
<u>Learning Management System (LMS)</u>	New HMIS Users must register & take mandatory self-paced training to get HMIS access. Instructor led training also available.	<u>LMS Support Form</u>
<u>DDAP</u>	CT DMHAS System – Outreach data must be entered or uploaded from HMIS to DDAP	<u>Elizabeth.Feder@ct.gov</u>
<u>PIT Database</u>	CT data reporting system used for the Annual Point in time Count and Housing Inventory Chart	<u>help@nutmegit.com</u>
<u>Engage</u>	Mobile application to record Street Outreach activities and participant data	<u>https://cthmis.com/support/</u>

HMIS Dashboards of Note



Exits for Shelter and Outreach

- <https://cthmis.com/hmis-data-access-insights/exits-from-emergency-shelter-and-street-outreach-dashboard/>

Homelessness in CT

- <https://cthmis.com/hmis-data-access-insights/ct-hmis-homeless-in-ct/>

Engage Outreach Application

- Engage is a mobile-friendly app
 - Records street outreach interactions in the field and syncs that data into HMIS
 - Document work and add data in real time
 - Has talk-to-text functionality
- Engage collects data even without the internet or cell service
 - Information uploads automatically once connected



Access and Support for the Engage App

For users who already have access, go to [Engage Login](#) to login.

If you need assistance with logging in, passwords, Multi Factor Authentication(MFA), requesting initial access or other general assistance, go to [Engage Support](#)

Request Access to the Engage Outreach App



Engage Outreach App Support



Engage Outreach App - MFA Support



Case Notes Requirements

- Every interaction with client or collateral should be documented
 - ✓ Consistent attempts to engage all participants
 - ✓ Attempt to engage again within 2 working days of initial engagement
 - ✓ At least monthly attempts for at least 3 months after housing move-in
 - ✓ **The Engage App has the option for talk-to-text case notes**



What to Include in Case Notes

Include in all case notes enough detail to enable someone else to cover:

- ✓ Date, Time and Name of Staff/Collaterals involved
- ✓ Nature of collateral contact involvement
- ✓ Location
- ✓ Observations about the person's appearance and any safety concerns
- ✓ Services, supplies and/or referrals provided or offered (brief description)
- ✓ Client requests/needs/response (brief description)
- ✓ Commitments and next steps (when will I come back, what will I do/bring)
- ✓ Incidents and follow up if applicable



For PATH projects – when no Disability Verification or Modified Mini Screen:

- ✓ Observation by an outreach worker of possible mental health symptoms; and/or
- ✓ Collateral mental health information from another service provider

Case Notes - Example



3/10/26, 3:15 p.m., Library entrance on Main St.

Met with client alone. He reported sleeping outside for the past 3 weeks and requested help with shelter and food. He also appeared tired, not wearing socks despite cold weather. I provided sandwich, water, and information on warming center. Offered socks, but he said he already has them at his site. He declined emergency shelter tonight, stating concern about leaving belongings. He agreed to meet tomorrow outside the library at 10am to get food at pantry and discuss storage options.

Wrap Up - Core Components of Effective Outreach

- Trauma Informed and Client-Centered Care
- Maximize Safety and Minimize Risks
- Housing Focus
- Assertive Engagement and Motivation Building
- Housing Needs and Preferences Assessment
- Housing Planning and Navigation
- Income and Resources Assistance
- Warm-Hand-Offs
- Aftercare Post Housing Move-In



Zoom Poll: Which core components are you using? Which could use more attention?

SELECT ALL THAT APPLY.

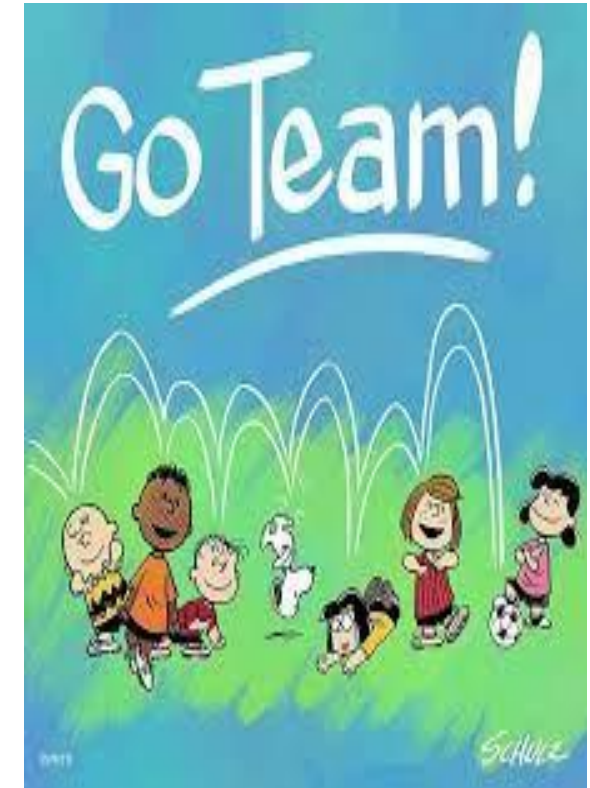




Closing Comments

Closing

- Outreach workers are critical in helping people obtain housing and provide support through the transition.
- Meet clients where they are and help them to be safe, reduce risks, build motivation and access housing.
- Be creative in finding housing solutions
- Support people through the transition to housing.
- Your work makes a difference and we appreciate you!





Additional Resources

Best Practices in Street Outreach

Session 1:

- [Slides](#), [Recording](#)

Session 2:

- [Slides](#), [Recording](#)



Upcoming Outreach Webinars:

- Supervisors Sessions: Supervising Street Outreach Staff & Programs
 - April 23rd and 30th, 2026 from 1:30-3:30
- Safety on Outreach
 - Date TBD



Communities of Practice: Schedule



All meetings will be from 10-11 AM

- Thursday 4/2/26
- Thursday 6/4/26

Join Zoom:

<https://us02web.zoom.us/j/89419988419?pwd=5bzO1dsm5saZCmxXOBfnLcJb2Yd3iK.1>

Meeting ID: 894 1998 8419

Passcode: 917908

Phone: 646-876-9923



Quarterly Outreach Meetings

Next Meeting: 6/10 at 1pm

Join on your computer or mobile app

[Join the meeting now](#)

Meeting ID: 219 248 774 387 59

Passcode: JS6EZ6HY

Dial in by phone

[+1 860-840-2075,,241639627#](#) United States, Hartford

[Find a local number](#)

Phone conference ID: 241 639 627#

Street Outreach Training Inventory

Web-based training available on topics including:

- Best Practices and Engagement Strategies
- Homeless Response System Overview
- Housing Options
- Housing Assessment & Planning
- Mental Health
- Crisis Intervention & De-escalation
- Harm Reduction
- Encampments
- Trauma-Informed Outreach
- Self-Care, Vicarious Trauma & Staff Resiliency
- Working with Special Populations (Youth, Older Adults, LGBTQIA, DV)
- Racial Trauma & Equity
- Disaster Response Planning



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Thank you!

Please turn on your cameras to say good-bye

