

**City of Berkeley Case Management/Housing Navigation (HN) services must be:**

- 1) Delivered with a commitment to Housing First principles of non-judgmental compassion, harm reduction and client choice – with the goal of obtaining and maintaining housing.
- 2) Follow a Critical Time Intervention (CTI) approach with an emphasis on developing community supports that can be sustained after the navigation services end including.
- 3) Delivered until client is stable in housing and will assist with a warm hand-off to service providers post-housing to the extent necessary for clients to retain their housing.
- 4) Offered in a setting preferred by the client (office, public space, etc.)

**Case Manager/Housing Navigators Services include:**

1. Thorough assessment of the client's strengths, preferences and barriers to housing that results in the below support:
  - Creation of housing support plan;
  - Assistance in gathering documentation needed to apply for housing (I.D. Social Security Card, and other documentation as needed for Permanent Supportive Housing);
  - Assistance with housing search and application submissions;
  - Identification and securing of resources for one-time move-in expenses, including assisting with coordination of the move;
  - Establishing procedures and contacts to support housing retention in the community.
2. Develop an Individualized Service Plan (ISP) based on the strengths and needs identified and provide ongoing support and coordination in the following areas (as needed):
  - Benefits Advocacy
  - Health/Medical
  - Mental Health
  - Substance Use
  - Employment/education
  - Community/social building activities
3. Respond to crises or emergencies as needed. Work collaboratively with other service providers as necessary.

**Role of Supervisor:**

1. Provide case conferences and individual clinical supervision on a regular basis, at least monthly.
2. Oversee organization and completeness of client files.
3. Coordinate trainings and ensure all staff are trained.

**Frequency of Service Provision\*:**

**New Enrollments:**

New enrollments may require weekly outreach and engagement.

**Once Housing Plan and ISP is complete and Housing documentation is on file:**

A minimum of one in person case management session per month is required.

**All contacts and outreach efforts must be documented in client's file and HMIS.**

**Client Files must contain:**

1. Initial intake
2. Release of Information forms (as applicable)
3. Individual Service Plan (ISP) or other document that specifies client goals, steps clients will take towards those goals, and support to be provided by the case manager. The ISP should be updated periodically as the client's goals changes or are updated.
4. Case Notes which reflect the client's work towards goal in the ISP.
5. Documentation of referrals made and follow-up.
6. Notice of Privacy and Grievance Policies
7. Documentation that supports housing placements (applications, I.D. SSN card, income verification, homeless documentation)

**Screening Tools should include:**

1. Basic client data, including income, insurance/benefits, current basic needs (food, clothing, etc.)
2. Assessment of client status, including the following elements:
  - Personal History and Current Situation
  - Housing History
  - Income and benefits received or needed
  - Life skills
  - Medical information and any prescribed medications
  - AOD history and current use
  - Psychosocial functioning and mental health status
  - Relationships and social support
  - Health education including nutrition
  - Current services received by client and primary contacts
  - Legal issues
  - Parenting skills and support (if relevant)

**Client Exits:** Agencies must have a policy and procedure in place for exiting clients from the program and recording those exits in the client file and HMIS.

**Training:** Agency shall provide on-the-job or external training (at least 16 hours) for each case manager. Training may include:

1. Housing First
2. Motivational Interviewing

## City of Berkeley Case Management/Housing Navigation Services Standards

3. Harm Reduction Strategies
4. Housing/Income Assessment/Strategies
5. Money Management & Budgeting Assessment/Strategies
6. AOD Assessments/Recovery Model and Harm Reduction Strategies
7. Mental Health First Aid
8. Cultural Competency
9. Documentation Training
10. Goal Planning
11. Privacy and Confidentiality (including HMIS training)
12. Public Benefits/Resources
13. Psycho-social Assessments
14. Co-occurring Disorders
15. Stress Management
16. Crisis Management
17. Domestic Violence
18. Role of Case Manager, Boundaries and Limit-setting
19. Engagement Strategies, Working with Resistance
20. Understanding the legal rights and responsibilities of landlords and tenants
21. Entering client data and services into HMIS (if relevant)