



Service Offer

Professional Consultant Services to Develop a Comprehensive Strategy to Address Homelessness in Oklahoma City

May 6, 2019

Proposal submitted by:

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Introduction

Communities across North America are working to develop and implement effective and efficient programs and services to address homelessness. However, it is not often that communities dedicate time and resources to intentionally look inward to identify opportunities to make changes to its service orientation and programming with the goal of improving outcomes for its clients. The Oklahoma City must be recognized for having the courage and dedication to investigate how practices and policies can be improved to ensure service excellence for the individuals and families experiencing homelessness within the city. With the adoption of best and promising practices that have been identified for homeless supports and re-housing programs, the Oklahoma City can effectively prevent and end homelessness.

Success can only be achieved if all available programs, services and supports continue to validate that housing is a core value and fundamental right, and not something that people need to *earn* as a reward, or conversely *lose* as consequence. A Housing Focused approach with Harm Reduction and Trauma-Informed Care tenets provide a framework and service orientation to safe and effective homelessness prevention, emergency shelter and re-housing efforts.

It is our experience that when there is adherence to best and promising practices, programs, organizations and communities see results in their long-term efforts to end homelessness that are tangible, inspiring, and innovative. Housing focused, trauma informed progressive engagement is critical to any approach to change the manner with which those experiencing homelessness are identified, connected to housing, and supported in their housing.

Throughout the United States, Canada and Australia, OrgCode has a successful track record in helping organizations and entire communities align their investments, programs and services with evidence informed practices and policies that ensure the delivery of successful programs that align with Housing First. We have worked with scores of communities over the past several years to reform their housing systems to provide person-centered, strength based and recovery oriented Housing First initiatives. We recognize that program evaluation; redesign and enhancement activities are essential for ensuring that finite resources are maximized.

OrgCode has witnessed the impact that federal, state and local investments can have when evidence informed practice, strategies, and tools are incorporated within communities. However, we have also witnessed the missed opportunities when communities do not take full responsibility and ownership for maintaining fidelity to housing focused practices, service orientation and policies. Lack of performance monitoring, compliance requirements, ongoing professional development opportunities as well as outcome and impact evaluation ensure that



individuals that are experiencing homelessness and high acuity of needs will not achieve long term housing stability, improved wellness, and community integration.

We would enjoy the opportunity to offer technical assistance to the Oklahoma City and its funded community partners for the purposes of evaluating the current implementation and effectiveness of best practices and to provide recommendations for enhancements in programming, investment directions and monitoring and evaluation activities to support current operations and future planning to ensure that Oklahoma City achieves functional zero for chronic homelessness locally. OrgCode Consulting understands that systems change is often required to get the results needed to ensure homelessness is rare, brief, and non-reoccurring.

About OrgCode Consulting, Inc.

OrgCode specializes in homelessness and housing. Our work takes us throughout the United States, Australia, and Canada¹. We work with all orders of government and non-profit organizations to improve their results in homelessness and housing. We pride ourselves on being catalysts for better outcomes.

We conduct work in the six following areas:

1. Planning, Policy Development & Evaluation

OrgCode develops plans with communities serious about ending homelessness and improving housing outcomes. Fluent in government regulation and policies related to housing and homelessness plans, OrgCode engages deeply with the community and people with lived experience to create vibrant, actionable plans that are aligned to best practice and the main currents of thought in the available grey and academic literature. We also have a proprietary housing forecast model that is unparalleled in helping communities understand housing needs by a broad range of affordability bands and household composition.

OrgCode develops policies that marry community, government and/or organization objectives with operational realities. We believe that policy reflects the guiding principles of the community, government and/or organization and influences decisions and actions. In the context of housing and homelessness, we believe that good policy improves housing outcomes, reduces homelessness, and means that homelessness is rare, brief and non-recurring. Policy development, in our opinion, should add value and benefit for the people most

¹ We are an international firm headquartered in Oakville, Ontario, Canada. All of our work in other countries is legal and governed by international agreements between the governments of the various countries. Half of the OrgCode staff are Canadian and the other half are American.



impacted by the policy, while being transparent in the proposed outcomes and reason for the policy. Policy should reflect the strategies, goals and values of the community, organization and/or government, and it should provide a practical implementable framework for realizing its objectives. When built upon defensible qualitative and quantitative data, a meaningful policy should be easily understood and concise.

OrgCode evaluates programs, policies and plans to help communities, organizations and government improve their results in serving people through homelessness programs and housing. We believe a prudent evaluation examines give core elements: Formation; Context; Impact; Process; and, Outcomes. The result of an OrgCode evaluation is a call to meaningful action in concrete steps that are both achievable and increase buy-in for the intended results of the program, policy or plan. We believe that evaluation is a key component of continuous improvement, and the lynchpin to making the Deming Cycle (Plan, Do, Study, Act) come to life.

2. Training

OrgCode's training motto is simple: *training that doesn't suck*. We believe we must be both relevant and engaging for training to resonate. We believe that if action does not change as a result of our training, we have failed. OrgCode's desire is to see practitioners, leaders and policy-makers all trained for the demands of the work in a way that they feel confident and qualified to improve housing and end homelessness.

Primarily we offer training on the following topics:

- *Assertive Engagement*
- *Coordinated Access*
- *Housing Based Case Management*
- *Housing Focused Sheltering*
- *Housing Focused Street Outreach*
- *Motivational Interviewing*
- *Performance Management*
- *Rapid Re-Housing*
- *Service Prioritization Decision Assistance Tool (SPDAT)*
- *System of Care*
- *Team Leadership*
- *Trauma Informed Care*
- *Wellness, Recovery & Harm Reduction*



3. Products

OrgCode creates products that are useful to the housing and homelessness services industry, many of which are disseminated for free. We believe that practitioners in the field do their best work when equipped with the best tools. Quite often engagement can be improved and tasks for easily completed between frontline staff and program participant if the right tools are in place.

The most popular of our products is the Service Prioritization Decision Assistance Tool and its associated suite, which is the most used homeless services assessment tool in the world. We believe in a fair and transparent process for assessing people's needs and ensuring vulnerable people get the housing resource best suited to their needs.

4. Data

OrgCode believes that data fuels the engine of change. As we move from hunches, anecdotes and opinions to proof, decision-making is improved, programs are refined, and outcomes are realized in ways previously thought impossible. There are three primary ways OrgCode is renowned for its use of data:

- a) *Homeless Management Information Systems* – OrgCode has expertise in driving deep into the numbers of an HMIS to better inform systems of care, operations and investment. We also are Systems Administrators for communities, managing the HMIS on behalf of communities and taking care of analysis and reporting.
- b) *Data Analysis* – OrgCode has expertise in compiling data from multiple sources like Statistics Canada, Provincial/Territorial and local governments and then undertaking multi-variate analysis to make sense of the data and inform policy and practice. We also have considerable expertise in creating reports based upon the data analysis.
- c) *Modeling* – OrgCode has expertise in creating complex models for forecasting demand in housing and social services. The OrgCode Housing Forecast Model has been instrumental in helping dozens of Canadian and American communities transform their thinking about affordable and supportive housing for various population groups.

5. Leadership Development

OrgCode believes in nurturing and training leaders in the housing and homelessness industry to create innovative, resilient, adaptive, professional leaders. Over the past few years, we have helped more than 800 established and



emerging leaders in the industry take the next step in their development. These have primarily occurred through the *OrgCode Leadership Academy in Ending Homelessness*. In addition, the senior staff of OrgCode and its Leader in Residence, coach more than two dozen senior executives in the industry on a regular basis.

6. Thought Leadership

OrgCode embraces innovation and research. We create white papers, standards, frameworks, blogs and podcasts for the housing and homelessness sector. We are advisors to the Federal governments of Canada and the United States on homelessness matters. The Senior Staff of OrgCode are frequent keynote speakers at housing and homelessness conferences. The President of OrgCode is an often sought after commentator on homelessness and housing matters in the media.

Our Team

Since 2001, OrgCode, Consulting Inc. has been helping cities with homeless system redesign, starting with the City of Toronto and its \$114 million shelter, support and housing administration division. While OrgCode began more than 30 years ago, its engagement with housing and homelessness began in 2001 and became its exclusive focus starting in 2009 when Iain De Jong joined and then took over the firm as its President and CEO.

OrgCode is a multidisciplinary consulting team with an international impact. Experts in the field of housing and homelessness, our core services include action-oriented research, data-informed analysis, robust facilitation, and outstanding training and technical assistance. Previous clients have ranged in size from state and provincial governments such as the States of Michigan and Arizona and Governments of Alberta, Newfoundland and Labrador; to local governments such as Baltimore, Virginia Beach, Waterloo, Hamilton and Ottawa; to Continuum of Care (CoC) structures such as the District of Columbia, Hawai'i, northwest Michigan, Jacksonville, Greensboro and Virginia Beach CoC; to world leading organizations such as the National Alliance to End Homelessness and Community Solutions (100K Homes Campaign). Across each project and client, our commitment to ending homelessness is encapsulated in our motto: Catalysts for Better Outcomes.

We are experts in evidence-informed practices to end homelessness. Leading national and international organizations rely upon OrgCode to improve housing options, implement effective housing programs, improve professional development of staff and provide the technical assistance required to end homelessness.



OrgCode brings more than 15 years of experience serving our fellow community members experiencing homelessness towards the goal of making such episodes brief, rare and non-recurring. Driven by real-time data and practical solutions, OrgCode offers the following areas of expertise.

Our team covers many disciplines including policy and planning, research, education, and social work. We excel in strategy, planning, training, research, community engagement, and positive social change. We also approach our work in this field from an operational readiness approach recognizing that in order to “do better”, front line staff and leadership teams must receive the training and support required to operate differently. While our work is strongly grounded in evidence, the most compelling attribute of our team is our passion. We love what we do – and we love why we do it.

Iain De Jong
President and CEO

Iain has over 20 years of experience in the homelessness and housing industry, having held senior positions in the public, non-profit and private sectors. An international leader in ending homelessness, Iain is a policy advisor to the Department of Housing and Urban Development and the National Alliance to End Homelessness, and the recipient of more than 20 prestigious awards for his work on ending homelessness. *The Book on Ending Homelessness* authored by Iain comes out this summer. The Service Prioritization Decision Assistance Tools (SPDAT, VI-SPDAT) are Iain’s creations – and are the most used homeless assessment tools used throughout the world.

During his tenure as President & CEO of OrgCode, Iain has worked with hundreds of communities big and small throughout the United States in their pursuit of ending homelessness including Los Angeles, Dallas, Tampa, Palm Beach, Detroit, Providence, Phoenix, Honolulu, Washington, St. Louis, Kansas City, Lexington, Austin, Fargo, Traverse City, Riverside, San Diego, Greensboro, St. Petersburg, and Tucson; as well as the states of Hawaii, Florida, Michigan, Minnesota, Nebraska, Arizona, Rhode Island, New Hampshire, West Virginia, Texas, and Pennsylvania.

Iain is also known for his work cultivating leaders within the sector. Through the OrgCode Leadership Academy on Ending Homelessness, Iain has provided guidance to more than 500 emerging and existing leaders in the homelessness services sector.

Tracy Flaherty-Willmott
Associate Director

Drawing upon more than 20 years of practical experience in the fields of homelessness and housing; addictions and mental health; strategic planning, community engagement and team building, Tracy has proven to be a formidable



catalyst for change. Whether working directly with street involved youth; facilitating training for front line service professionals or evaluating programs, Tracy has demonstrated her commitment to evidence-informed practices, outcome-based programming and solution-focused approaches. Prior to joining OrgCode, Tracy facilitated the development and initial implementation of a long-term plan to end homelessness in Medicine Hat, Alberta. Today, Medicine Hat is recognized as the first city in Canada to end chronic homelessness.

As a senior member of OrgCode's team since 2012, Tracy has provided program evaluation, system design and technical assistance expertise throughout the provinces of Ontario, Saskatchewan, Alberta, Nova Scotia as well as Newfoundland and Labrador. In the United States, Tracy has been active in such cities as Virginia Beach, San Diego, Kansas City, Toledo, Fort Worth, Fort Walton Beach, as well as throughout the state of Michigan.

Erin Wixsten
Associate

During her career, Erin has been a practitioner of direct services as a case manager and advocate for youth, young families, and single adults experiencing homelessness. Before joining OrgCode as a consultant, Erin worked for The Link in Minneapolis as Director of Housing and Homeless Services Division. During her eleven years at The Link, Erin grew the division to provide a range of services including a suburban drop-in center and street outreach program, site-based and scattered-site permanent supportive housing programs, and four Rapid Rehousing programs including one for young families, one for youth experiencing homelessness in the suburbs, and another for youth who identify as LGBTQ.

Erin is a fierce advocate who focuses on developing and providing programs and services that support individuals in exiting and ending their situation of homelessness through housing, holistic and trauma-informed services to meet their needs and implementing policies and best practices that are evidence-based to ensure people receive the absolute highest quality of services possible within the system of care.

David Tweedie
Associate

David has been working to end homelessness for more than 10 years, using data to improve service delivery, accessibility and transparency to increase housing outcomes for his vulnerable neighbors experiencing decades of homelessness. As the Coordinated Entry Administrator for The Community Partnership for the Prevention of Homelessness, team leader for the District of Columbia's 25 Cities initiative and chair of the veteran sub-committee of the D.C. Interagency Council on Homelessness, David led the implementation of Coordinated Entry within the District. The initial launch of coordinated assessment for veterans in August 2013



led to a 20% reduction in veterans experiencing homelessness within 4 months and bringing that process to scale for the broader system resulted in a 30% reduction in veteran homelessness across 3 years.

Drawing on his 11 years' experience as the System Administrator for Homeless Management Information Systems across multiple Continua of Care, David designed the technological platform to better target street outreach to people not yet served or difficult to locate. Combining that technology's complex programming, OrgCode's assessment tools, and in-person case conferencing resulted in more than 1,000 of D.C.'s most vulnerable neighbors sleeping outside or in shelter moving into permanent housing over 3 years, as part of more than 3,300 people who were permanently housed during that time. David wrote and later refined the Coordinated Entry policies and procedures for people experiencing homelessness within the District of Columbia, Hawai'i, and North Carolina CoC including Durham, Winston/Salem and Raleigh/Wake.

Cindy Crain **Associate**

Before joining OrgCode, Cindy was the CEO of the Metro Dallas Homeless Alliance - the Continuum of Care lead for Dallas. And prior to that she was the CoC Lead for Fort Worth, Texas. With decades of experience in senior positions focused on ending homelessness, Cindy is well versed in the mechanics of CoC responsibilities and operations from NOFA applications to grant monitoring; coordinated entry to PIT Counts.

During her short tenure with OrgCode, Cindy has been responsible for helping update the next versions of the SPDAT products, co-authoring guidance for the Government of Canada's on coordinated entry, producing a report on unsheltered homelessness in Alberta's Capital, and improving coordinated entry in Red Deer and Calgary.

The Enclosed Service Offer - An Introduction

The enclosed service offer provides an overview of OrgCode's approach to the comprehensive analysis of the existing homeless and housing service delivery system in the Oklahoma City. Given our expertise in the design, development, implementation and evaluation of housing and homelessness programs internationally, OrgCode is well positioned to effectively assess coordinated entry systems, emergency shelter services, homelessness prevention initiatives, housing with related services as well as housing stabilization supports and services dedicated to not only ending homelessness but also "homelessness proofing" with clients for future long term stability. As has been identified by our many past and present clients focused on preventing and ending homelessness, we are dedicated to using the results of objective and comprehensive evaluations to ensure enhancements to service excellence in the delivery of person-centered,



strength-based supports and services. We trust that we will be able to work with the City team, local partners and community to ensure that the insights gleaned through the homeless and housing system review will provide the information needed to enhance service provision and strategic investment in the future to end homelessness one person or family at a time.

Our Understanding of Your Needs

Oklahoma City is committed to ending homelessness and this is evidenced through the incredible leadership and community initiatives that have taken place over the last few years including the participation in joining the national 100,000 Homes campaign supporting a shift to a Housing First orientation, focusing on family and youth homelessness, and developing a Coordinated Entry System to support consumers to be identified and quickly matched with housing that meets their needs.

Ending chronic homelessness in community is no longer rocket science. The greatest challenge rests in creating a system of care which functions at optimal capacity in a sustainable fashion. Recognizing that four sectors of service must be functioning at optimal capacity for communities to reach a functional end to homelessness, OrgCode's report provides a summary of the progress made to date in the services and programs funded to prevent and end homelessness. To end chronic homelessness, Prevention & Diversion; Connection to Permanent Solutions including Coordinated Entry Systems and Shelters; Re-Housing Programs and Services (including Permanent Supportive Housing) as well as Ancillary Supports must be effectively coordinated. For the purposes of this operational review, local efforts funded to impact Prevention & Diversion, Connection to Permanent Solutions and Re-Housing activities will be examined.

Throughout the operational review, funded programs and services will be investigated to identify their demonstration of fidelity to practice; a housing focused service orientation and its success/progress in getting the results needed to ensure that the Housing and Homelessness System is on track to reach functional zero for chronic homelessness. Given the reality that no one agency or program can gain the results needed to prevent and end homelessness independently, each sector of service will be reviewed for its operational readiness and success in achieving the outcomes and impacts required. For the use of the City and the funded agencies, each sector will be assessed based on Service Orientation/Philosophy, Service Delivery Excellence & Performance Benchmarks that demonstrate service excellence and contribute to system success. Below is a summary of these three areas of operational readiness and success.

To assist in identifying successes and future opportunities for enhancement for each sector, OrgCode has summarized the service orientation and performance



using an overall ranking for each sector of service ranging from a 1 star ranking that indicates that this sector is still in the formative stage of its evolution related to the service orientation and operations required to effectively contribute to an end to chronic homelessness locally to a maximum overall ranking of 5 stars indicating that this sector is functioning at optimal capacity and recommendations surround sustaining momentum and service excellence.



E.g. of ranking:

Indicators and Benchmarks of Success:

1. *Service Orientation/Philosophy* will investigate:

- alignment with Housing First core requirements (strength based, recovery-oriented client centered, non-compliance based, no evidence of housing readiness expectations; client-choice, etc.);
- commitment to prioritizing those that are most vulnerable and require supports to prevent and end their homelessness;
- demonstration of progressive engagement in the intensity, duration and frequency of supports provided, respecting people's self determination to resolve their own homelessness whenever possible;
- positive housing destinations as the goal of all programs with participants having independent and standard tenancy agreements.

2. *Service Delivery Excellence* will look at such indicators as:

- consistent implementation of Policies and Procedures to govern local practices and operations;
- demonstration of professional practices that are guided by evidence, including the use of reliable and valid tools and strategies;
- demonstration of staff having the knowledge, skills and resources to complete their jobs in ending homelessness;
- clear safety procedures and protocols for in-community and in-home delivery of services; and
- coordination with the broader homelessness and housing system as well as mainstream ancillary services;
- clearly defined relationships with such ancillary services as income benefits, employment, corrections, health and education;
- clearly defined policies and standards regarding when participants should continue or be discharged/exited from programming/service.

3. *Performance Benchmarks including Outputs, Outcomes & Impacts* investigates:



- the number of households diverted from the homeless serving system;
- reduction in the length of time that program participants remain homeless;
- % of permanent housing success rate for exits/graduates;
- reduction in the number of served households/individuals that return to homelessness;
- the number of landlords and housing option recruited as well as the amount of time between program matching and housing move-in;
- flexibility in rental and move-in assistance, reflecting progressive engagement to match the needs of the participants (providing only the assistance necessary to stabilize the housing);
- housing focused case management standards and practices are evident including ensuring that participants' basic needs are met at move-in and evidence that transitioning off financial assistance, when possible, is coordinated with case management activities.

Although achieving a functional end to homelessness in any community appears to be a daunting challenge, the reality of this accomplishment is easily defined. Communities that achieve functional zero ensure that they have more people exiting homelessness than are entering/re-entering homelessness at any given point in time. The community must have the knowledge and resources to efficiently respond to a housing crisis when it happens to ensure that individuals and families entering homelessness have efficient access to the assistance required for a quick return to a housed state. Most people will require minimal assistance while others -based on their needs, vulnerability and lack of access to resources - will require a more intensive support program or intervention.

The collective goal of achieving functional zero to chronic homelessness can only be achieved in a housing and homelessness service system that is demonstrating service excellence and a housing first service orientation. This operational review will examine the likelihood of Oklahoma City in achieving functional zero given its current investments and service priorities.

Proposed Methodology and Workplan

Truly transformative projects must be structured to surpass an initial exploration of program outcomes and operational challenges. They must ensure that opportunities for enhancement and improved service coordination are identified and turned into action. As experts in the field, the OrgCode team members are masters at converting theory, evidence and promising policies into operational and systemic realities that are person-centered, recovery-oriented, and housing focused. Using this empirical and operational expertise,



our mission in this project is to ensure that targets and processes are established to guarantee that all activities and recommendations promote improved housing and stability outcomes.

Phase One: Gathering Insights on System and Program Performance, Operations, and Fidelity to Best and Promising Practices

Our experience from other jurisdictions demonstrates the importance of community and service provider engagement during the information gathering stage of a program evaluation and enhancement project. Gathering materials and conducting analysis of program outcomes and the Coordinated Entry System's effectiveness offers both program level and system level evaluation to inform upon the recommendations and highlight both gaps and opportunities for enhancements across the entire Continuum of Care.

Task 1: Data and Information Gathering and Analysis of Programs and Services

Part One:

- Compile and analyze strategic plans, policy and procedure documents, logic models, monitoring protocols, funding and partnership agreements;
- Review all Coordinated Entry System (CES) policies, protocols and all documentation on core business services;
- Examine effectiveness relative to intent;
- Outline enhancements in policy, practice and Housing First aligned operations.

Part Two:

- Review system and project data for the funded projects/services to understand outputs and outcomes;
- Analyze HMIS data to evaluate CES process, implementation and tools utilized to end homelessness to identify opportunities for refinement;
- Investigate social return on investment, where possible;
- Assess opportunities for improved alignment.

Important Program Level Data:

- Demographics of those served including race, gender, family connections, etc.;
- Number of individuals/families referred, and number of people accepted;



- Number of participants remaining in housing after six months and one year after receiving assistance;
- Program exits by housing outcome, stability indicators;
- Post program review of housing stability, where possible;
- Current Program Efficiency, including caseload ratios.

The importance of this data mining activity is actually two-fold: effectiveness of funded homelessness and housing projects in meeting funder expectations, maintaining fidelity to practice and producing the expected outcomes and impacts for service participants receiving housing stabilization supports that match their acuity levels; and, highlight opportunities for database customization work that OrgCode could assist with to ensure that the local data collection processes are strategic in nature.

Task 2: Stakeholder Consultations

Interviews: Using a semi-structured interview guide, OrgCode will conduct a range of in-person, electronic surveys, and phone consultations with stakeholders with a perspective and/or expertise while also gathering information on CES, housing stability and services within the area. Working with City staff and such community partners as outreach, CES, prevention & diversion, shelter, and Permanent Supportive Housing, Transitional Housing and Rapid Re-Housing Program staff, a list of relevant stakeholders will be generated, and we propose using the Community Survey as a vehicle to identify additional interviewees.

Engagement with People with Lived Experience: As social scientists and community researchers, we are adamant that the voices of people with lived experience be heard. Working with housing and homelessness service partner agencies, we will engage with participants regarding the funded programs, the supports provided and the impact of these services on their housing, stability, health and quality of life. We will gain input from people with lived experience informally in our shadowing and review of such services as outreach and shelter. We will be cognizant of the need to ensure the voices of experiential persons are included in gathering direct client input.

Task 3: Service Provider and Community Stakeholder Surveys

Self-assessment is a key reflective practice. Building upon existing instruments we have implemented in other communities, we will customize an electronic Service Excellence Self-Assessment Survey to be completed individually – and anonymously – by program staff involved in the delivery of the identified programs including Drop In and Outreach providers, Emergency Shelters, Coordinated Entry System operations and partner agencies, Re-Housing Providers (including Transitional Housing, Rapid Re-Housing and Permanent



Supportive Housing) & Community Partners The results help leverage that which is working well, while concurrently pinpointing where improvement is necessary.

OrgCode further recommends that community partners that work closely with the identified homeless service programs have an opportunity to provide feedback on the performance of local homelessness and housing programs, identify areas of strength as well as opportunities for revisions/enhancements. Such a community engagement opportunity, although reliant on voluntary participation to be a valuable activity, naturally provides insight for strategic planning but this avenue can also be used to identify professional development needs. Collaborating with Oklahoma City, OrgCode will design and deploy an electronic Community Stakeholder Survey. The link can be shared to known entities involved in direct housing program service delivery, funding and/or planning of housing service programs and groups involved in ancillary services.

The surveys help inform us in several ways, including:

- Provides a pulse regarding how people feel about the current operations of the Housing First aligned program, its role in the community and its opportunities for improvements;
- Measures alignment with and understanding of Housing First principles and service orientation;
- Identifies future professional development activities required by service providers;
- Maximizes inclusion of voices into the process;
- Identifies critical differentiators in communities across the community.

Task 4: Program Monitoring Visits, On-Site Shadowing and File Audits

Beyond the semi-structured interviews, we propose that more detailed monitoring visits be completed with the funded programs and services, including all core business services related to the Coordinated Entry System. Each OrgCode team member is experienced in performing community-based assessments on project practices, supports, data and file management, housing location and landlord liaison activities and the delivery of client-centered, recovery-oriented and strength-based services. Such a front line evaluation of current service pathways and supports will provide insights regarding service coordination, alignment with Housing First principles and practices as well as clarity on operational approaches.

As is our customary practice, OrgCode staff will also shadow case managers into the field as they do home visits, attend weekly case review, examine data collection processes, etc. and provide feedback on how activities went to both the staff member and the Team Leader. This is NOT just evaluation – it is coaching



- intended to improve overall excellence in service delivery, operational tasks and professional practice.

Throughout these performance monitoring and evaluation activities, OrgCode will apply two lenses for analysis:

System lens: each funded program is examined based on contribution to the local homeless and housing system.

End-user perspective of programs and systems: Gaps and opportunities for realignment from this perspective can differ compared to how changes may be considered at the service user level.

Determining which programs, and even specific workers, to shadow and engage with in this process will be subject to input by the Oklahoma City to ensure there is a balance in programs seen and reviewed - from that which is thought to be performing well, to those that are thought to be underperforming. OrgCode will look to Oklahoma City staff to help set-up and facilitate the engagement with each of the organizations to be shadowed.

Phase Two: Analysis and Evaluation and Final Report with Findings and Recommendations for System and Operational Enhancements

This comprehensive report on the evaluation and analysis of the information collected during Phase One will provide a summary of OrgCode's insights and recommendations related to Oklahoma City's housing and homelessness system, with particular focus on the investments, capacity building and resource priorities required to assist in preventing and ending chronic homelessness. Recognizing that ongoing support and monitoring will be required to ensure that the transformation expected for the service orientation and support provision at local homeless service programs, OrgCode will provide a final report that will not only summarize the findings through the evaluation and analysis, but also provide a blueprint for future investment priorities that Oklahoma City can provide to ensure alignment with promising practices and approaches in the years to come.

Beyond this report of findings and recommendations, ongoing monitoring and coaching will be essential for a truly transformative shift in practices, services and orientation so continued leadership by Oklahoma City leadership will be essential moving forward. Without it, it is human nature for a return to previous, often ineffective practices. The recommendations and final report will:

- Provide detailed commentary on improvements necessary for each sector of service (Coordinated Entry System, Prevention & Diversion; Connection to Permanent Solutions; and, Re-Housing Programs & Services);



- Outline how Oklahoma City can better monitor and support each of the program areas and system interactions, and improve policy development and strategic funding investment as it relates to each of these sectors of service;
- Identify which best and promising practices are in full effect, which are in partial effect, and which seem to be absent within service delivery, policy, and funding;
- Identify process improvements that are necessary to achieve intended program outcomes and delineate roles and responsibilities between the City and funded agencies in these improvements.

Phase Three: Supporting Implementation

Task One: Visioning Session with Breakthrough Thinking

System change requires insight into gaps and opportunities, recommendations for enhancement, strong local leadership, and data systems that work. However, even this is not enough if community programs and partners are not invested. Buy-in is critical for recommendations that are put forth to make it 'off the page' and into implementation. Upon the completion and presentation of the Final Report, OrgCode will facilitate a one-day visioning session to leverage local knowledge and expertise and create a forum that brings together a broad range of perspectives and promotes systems thinking about how to support implementation of recommendations within Oklahoma City.

The day will begin with an outline of the current strengths and opportunities, as well as pre-identified gaps and challenges, both internal and environmental.

From there we will transition to a discussion of shared values and a discussion of principles that provide the foundation for the dialog and exercises for the day. The visioning session will use a Breakthrough Thinking method to have participants - individually and in group sessions - explore and identify priorities for Oklahoma City that will move your community closer to ending homelessness. Participants will be challenged to categorize and share their contribution as important and urgent, important but not urgent, or nonimportant and non-urgent. Like ideas will be grouped together by OrgCode facilitators. Using a public process of preference determination, the group will decide the key areas that would appear within your strategic planning process.

The goal of the visioning process is about taking intuition, creativity and evidence informed approaches into a strong future with Oklahoma City being identified as a leader in ending homelessness while ensuring clearly defined goals and principles for that future.



Task Two: Report of Visioning Session Activity

Through the visioning session, Oklahoma City and community partners will develop a set of shared values and priorities that will lay the groundwork for how your community can continue to improve how you function as a system, and provide clarity to tasks and initiatives of which this entity is a part and can continue to support, and align with other work occurring within the community to ensure the greatest impact.

OrgCode will provide a report of the activities that occurred throughout the visioning session, including identified shared vision and values informing the future. This report will support the Final Gaps and Opportunities Report to align values with action steps needed.

Phase Four: Training and Technical Assistance for Aligning Services and Supports with Evidence Informed Practices

For a community to be most effective in preventing and ending homelessness, it must rely on effective system-based policy and program development, the incorporation of evidence-based tools and interventions as well as the momentum and urgency required to turn strategic plans into action and outcomes. Leadership in Oklahoma City must demonstrate an ability to lead systemic change. Based on the findings outlined in the Final Report and the work done by your community in the Visioning Session, OrgCode will work with the City and its partners to customize a training and technical assistance plan to ensure the enhancement/realignment of operational practices and service orientation to align with a Housing Focused, Trauma Informed and Recovery Oriented Community of Practice.

Our sessions will be designed to dig deeper into how local partners can better understand a systems-level response to preventing and ending homelessness, how programs and services can improve their implementation of best and promising practices and enhance a leadership structure that promotes service excellence and strategic impacts for the local individuals and families you have the privilege to serve to ensure that homelessness is rare, brief, and non-reoccurring.

Training/Knowledge Sharing

OrgCode trainings are engaging and dedicated to assisting communities operationalize the theories and approaches known to get the results needed to reach “functional zero”. You can expect trainings that provide both system level knowledge and application, as well as best and promising practices to support program level implementation and suggestions for how to quickly align to a renewed service delivery model. Trainings will be customized to meet your



community's specific needs with curriculum and training materials being delivered in a way that can be easily and quickly implemented into operation.

Although it is impossible to predict the training and technical assistance needs of your community partners and system of care prior to the operational review and evaluation, here is a list of training sessions and technical assistance opportunities that have assisted other communities realign their practices, processes and services:

Examples of Training and Enhancement Sessions:

- Housing and Homelessness System of Care - A Redesign Lab
- How to be an Awesome Shelter
- Excellence in Housing-Based Case Management
- Progressive Engagement and Diversion
- Trauma Informed Care that Promotes Wellness and Reduces Harm
- Tools You Can Use: Understanding the Stages of Changes, Motivational Interviewing, and Assertive Engagement
- Outreach to Housing
- Enhanced Performance Monitoring

Examples of Technical Assistance:

- Customization of CES report templates, Priority List reports, etc.
- Development of policies and standards of care for any funded program stream, including CES, shelter, Rapid Re-Housing, Permanent Supportive Housing, Homelessness Prevention, etc.
- Ongoing HMIS support
- Leadership and staff support and coaching
- On-site coaching of housing stabilization, sheltering and diversion activities with funded programs

Budget

The following table provides an overview of the duties, timelines, staffing and costs related to completing the proposed activities related to completing a comprehensive strategy to address homelessness in Oklahoma City, as outlined above.

TASK	TIMEFRAME	TEAM MEMBER	COST
Phase One: Gathering Insights on System and Program Performance, Operations, and Fidelity to Best and Promising Practices			



Data and Information Analysis of Programs and Services	5 Days Remote	Tracy, Erin, and David	\$ 6,000.00
In-person, and phone Stakeholder Interviews and Consulting Persons with Lived Experience	1 Day Onsite 2 Days Remote	Tracy, Erin, Cindy, and David	\$ 4,900.00
Service Provider and Community Stakeholder Surveys	3 Days Remote	Tracy, Erin, and Cindy	\$ 3,600.00
Program Monitoring Visits, On-Site Shadowing and File Audits	4 Days Onsite	Multiple OrgCode Team Members	\$ 10,000.00
Phase Two: Analysis and Evaluation and Final Report with Findings and Recommendations for System and Operational Enhancements			
Final Report Preparation	5 Days	OrgCode Team	\$ 6,800.00
Final Report Presentation	1 Day Onsite	Iain and/or an OrgCode Associate	\$ 2,500.00
Phase Three: Supporting Implementation			
Visioning Session with Breakthrough Thinking preparation and facilitation	2 Days Preparation 1 Day Onsite	Iain De Jong will facilitate with at least one other OrgCode Associate	\$ 5,220.00
Report of Visioning Session Activity	2 Days	Iain and/or another OrgCode	\$ 2,720.00
Phase Four: Training and Technical Assistance for Aligning Services and Supports with Evidence Informed Practices			
Up to 4 days of in person and/or webinar training session	4 Days Onsite	Iain, Tracy, Erin and/or David	\$ 10,000.00
Technical Assistance for funded partners or Oklahoma City	5 Days Onsite or Remote	Iain, Tracy, Cindy, Erin and/or David	\$ 12,500.00
Travel and all disbursements for all onsite activities related to Comprehensive Strategy to Address Homelessness in Oklahoma City project			\$ 20,000.00
Total Project Proposal			\$84,240.00

Costs are based on \$170/hour for material preparation, curriculum development, and writing; \$250/hour for analysis and evaluation; \$2,500/day for on-site activities; \$1,200 remote activities.



Conclusion

Thank you for considering OrgCode for this project. We believe that our expertise in working to end homelessness will allow us to deliver this project efficiently and effectively. We are always open to negotiating the budget and project activities prior to the signing of any contract.

We look forward to opportunity to work with Oklahoma City and its funded agencies on this important initiative.

Sincerely,



Iain De Jong
OrgCode President and CEO

