Funding and Sustainability: Making SOAR Work in Your Community

August 2024 Dialogue Call

NC COALITION to end HOMELESSNESS

Updates from SSA

- SSA announced [nine new Compassionate Allowances (CAL)](#) conditions and revisions to two existing CAL conditions

- Sign up for the [SSA Advocates listserv](#) to stay up to date with SSA: [https://public.govdelivery.com/accounts/USSSA/subscriber/new?topic_id=USSSA_143](#)

- [Monthly Information Package (MIP)](#): Published monthly, the MIP is an electronic publication produced for distribution to local media outlets. Each issue contains the latest information on SSA programs, services, and initiatives.
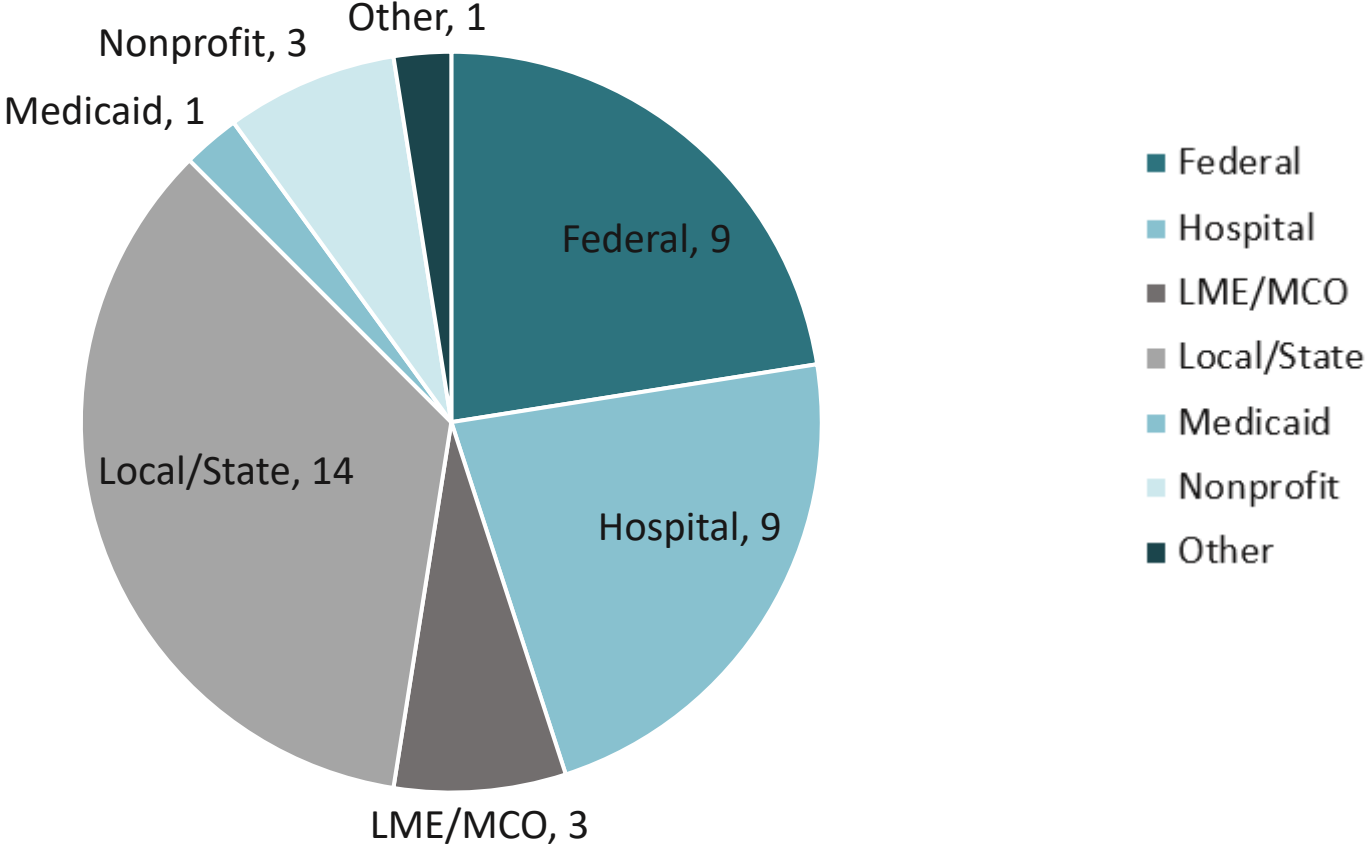
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Reminders from NCCEH

- FY23-24 outcoming reporting season is OVER! Thank you to everyone who logged outcomes.
  - 75% approval rate for all applications in FY 23-24 (236 decisions)
  - 61 more decisions that last FY, 62% last year
- Annual Meeting registration now open: https://www.ncceh.org/events/1699/
  - Friday, September 27 from 10 AM to 3:30 PM
  - Randolph Community College in Asheboro, NC

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Funding SOAR

- All 50 states participate in SOAR by:
  - Reallocating existing resources
  - Securing funding through federal and state grants and foundation funding
  - Establishing collaborations with hospitals and criminal justice settings

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2024's Funding Sources

Legend:
- Federal
- Hospital
- LME/MCO
- Local/State
- Medicaid
- Nonprofit
- Other

Pie chart values:
- Federal, 9
- Hospital, 9
- LME/MCO, 3
- Local/State, 14
- Medicaid, 1
- Nonprofit, 3
- Other, 1

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Define what you're looking to fund

- Outline specific goals and objectives for funding needs and create a plan to approach funders:
    - Funding & Sustainability Self-Assessment
    - SOAR Funding Action Plan
    - SOAR Cost Savings/Benefit Calculation Guide

- Develop an elevator pitch – you never know who you'll meet!

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5. **Collaboration**: The financial success of your program depends on community collaborations (e.g., human services or medical records). In order to grow, you may need to make some new connections (e.g., criminal justice, hospitals).

Based on plans to expand SOAR activities, with what organizations do you plan on building relationships?

Novant Health, Balance of State

6. **Marketing**: It is important to adequately market your services to the audiences on whom you depend. Consumers must know how to access your services and potential funders and policymakers must understand the importance and benefits of your work (e.g., Local legislators may need to learn how SOAR can bring federal dollars into the local economy; or, local hospitals may need to understand how SOAR can help their facilities recoup retroactive Medicaid payments).

Who needs to know about our SOAR program and how are we going to inform them?

- Community fairs/drives, continuing to visit RC meetings,
- Hospitals in BoS,

7. **Champions**: It 'takes a village' to grow a SOAR initiative! You want leaders in your community who are "SOAR Champions" (e.g., legislators, agency leaders, philanthropists, local celebrities, etc.). Regardless of their role, it is important that these champions are able to influence decision makers (i.e., funders, policy makers) towards desired outcomes for your initiative.

Who are your current champions or potential leaders? What do they bring to the table?

Debra-funding/advocacy experience; Brian-strategic/funding experience; Meck county + CDA -
exemplify a successful SOAR program; Emily-started whole thing; Sametra-
technical knowledge

8. **Preparation:** Be prepared for funding opportunities that have short application periods. While every opportunity is unique, there are some general requirements. Update and collect these common materials on a regular basis so you can more easily respond to funding opportunities when they arise.

Which items do you already have prepared?

___ Project summary: Overview of SOAR (how it works, who it helps, what you hope to accomplish)
___ Background: Your agency's history and mission. Include challenges you address and populations served (include key demographics)
___ Current programs and accomplishments: Include recent achievements and number of staff/volunteers
___ Organizational relationships/collaborations/partnerships (both formal and informal)
___ Draft funding request (SOAR Sample Proposal)
___ Steering committee/Board meeting minutes covering at least one year
___ Examples of recent articles about, or evaluations of, your organization

Financial Information:
___ Recent financial statements
___ Current funding sources
___ Sample project budget

___ Board of Directors (or steering committee)
___ Most recent IRS letter indicating your agency's tax status
___ Resumes/bios of key staff, including qualifications
___ Most recent annual report

Cost Savings to the Community

Type	Beneficiary	Source
Reduced emergency room usage	Hospitals	Atlanta - First Step (Barbara Peters)
Reduced recidivism rates	Local and state	Issue Brief: SOAR Works for Individuals in Legal Settings
Reduced jail stays	Local and state	Local jail
Reduced state hospital stays	State	State hospital
TANF savings	State and county	State or county agency
Reduced shelter stays	Homeless service system (local, state, federal)	HMIS
Housing First (ending homelessness)	Individual, homelessness and housing system	See Housing First Studies below.

Increased Income

Type	Beneficiary	Source
SSI/SSDI cash benefit	Individual	Multiply monthly benefit by the number of applicants approved. Multiply by 12 for an annual amount. *[# of approvals] * [SSI federal benefit rate] * [12]*
Medicaid/Medicare reimbursement	Health care providers	State Medicaid agency, health care providers, and hospitals *Seven states reported $618,246 in Medicaid reimbursement for 111 individuals, or an average of $5,570 per person, as a result of SOAR (2023)*
General/public assistance reimbursement	States, counties	State or county agency *Twelve states reported $157,377 GA/PA reimbursement for 43 individuals, or an average of $3,660 per person, as a result of SOAR (2023)*
Rental income	Housing providers	Housing providers, local housing authority

NC SOAR's Funding Action Plan

Goal 1: Increase SOAR's visibility

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Goal 1: Increase the Visibility of SOAR		
Increase the visibility of the state's SOAR program through partnerships, social media/social marketing, and sharing SOAR outcomes with individuals, government, and the community.		
Measurable Objective	**2024**	**2025**
Create/update marketing materials for different audiences	2 - new infographics	2 - new infographics
Develop new ways to identify and engage SOAR 'Champions'	1 - new champion	2 - new champions
Action Steps	**Lead Person**	**Timeframe**

Priority 1:
■ Speak w/ Sametra about sample materials
   o Use data collected from OAT
   o Make different versions of the materials based on the target audience (hospitals, policy makers, medical professionals, service providers)
   o Review materials, revise based on input
 	
■ Distribute materials at local events and through social media
 	
■ Update materials on an annual basis based on new OAT outcomes and any programmatic changes
	SOAR STL
	
	SOAR STL and SOAR Steering Committee
	
	SOAR STL and Steering Committee
		August-September 2024
		
		Ongoing; post outcomes on social media by October 2024
		
		Annually

Priority 2:
■ Choose 3 "champions" who are likely to support SOAR efforts
   o Make three recommendations for each category, 1) policy maker 2) human service providers and 3) a person directly connected with a funding source
   o Identify best way to engage and recognize the individual for their contributions (e.g. join the Steering Committee, give them an award, recognition on website)
   o Implement plans based on the discussions above
	SOAR STL
	SOAR STL and Steering Committee
	
	SOAR STL and Steering Committee
	
	SOAR STL and Steering Committee
		August 2024
		
		August 2024
		
		September 2024

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NC SOAR's Funding Action Plan

Goal 2: Create more full-time SOAR positions

Goal 2: Create More Full Time SOAR Positions		
Receive funding for NCCEH to be the sub-granter for SOAR projects in NC.		
Measurable Objective	**2016**	**2017**
NCCEH becomes sub-granter for SOAR projects	5 new FTEs	5 new FTEs
Implement plan to access 'long term' funding for SOAR activities	1 - item	1 - item
Action Steps	**Lead Person**	**Timeframe**

Priority 1:
■ Continue outreaching to Novant Health and other hospitals interested in SOAR model
   ○ Research what hospital systems are in rural NC
   ○ Invite key employees to meet & greet to introduce to them to SOAR
   ○ Share marketing materials highlighting ROI and health outcomes
	SOAR STL	August-Ongoing (developing relationships is key)

Priority 2:
■ With help and support from the SOAR TA Center, work with CoCs to have SOAR included in annual CoC competition application.
   ○ Speak with members of CoC funding groups/subcommittees to ensure that they are knowledgeable about SOAR
   ○ Provide members of the funding groups/subcommittees with materials and SOAR outcomes
   ○ Provide any necessary administrative support to have SOAR included in the next CoC grant competition.
	SOAR STL	TBD (Based on cycle)

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Compile a funding portfolio

- What information is needed to apply for funding?
    - Program overview
    - Budget
    - Outcomes
    - Justification
- Have a portfolio you can tweak/customize to your audience

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Determine the funding source that best suits your needs

- Foundations at the local and/or national level

- Corporate giving programs

- State or federal funding
    - Federal: SAMHSA's GBHI and CABHI's, CoC funds
    - State: Block grant allocations, grant allocations, and legislative initiatives

- Local funding
    - Plans to End Homelessness
    - County funds

Choose a funding source to access and acquire support from all necessary decision makers

- Ex: relevant policy makers, Board of Directors, CoC leadership, county officials, etc.

- **FACTORS TO CONSIDER:**
  - ⭐ Length of time you will be able to fund the desired activity
  - ⭐ The amount of reporting required if you're awarded

- **Critical** to ensure you/your agency has capacity to carry out the funding requirements!

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Use the funding source's application requirements to create an application workplan

- **Review Funding Guidelines**: Understand the specific requirements and criteria outlined by the funding source.

- **Define Objectives and Milestones**: Break down the project into clear objectives and establish key milestones.

- **Allocate Resources**: Identify and assign the necessary resources, including personnel, budget, and equipment.

- **Develop a Timeline**: Create a detailed schedule with deadlines and deliverables that align with the funding requirements.

- **Assign Responsibilities**: Clearly designate roles and responsibilities to team members for each component of the workplan.

- **Establish Reporting Procedures**: Set up mechanisms for tracking progress and reporting to the funding source. (OAT!!!)

- **Prepare for Contingencies**: Plan for potential risks and develop strategies to address any issues that may arise.

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Apply for the funding and await the result!

- If you are not awarded, ask for feedback so you can improve the next time around

- If you are awarded, let NCCEH know asap! We want to celebrate your accomplishments and support in any way we can

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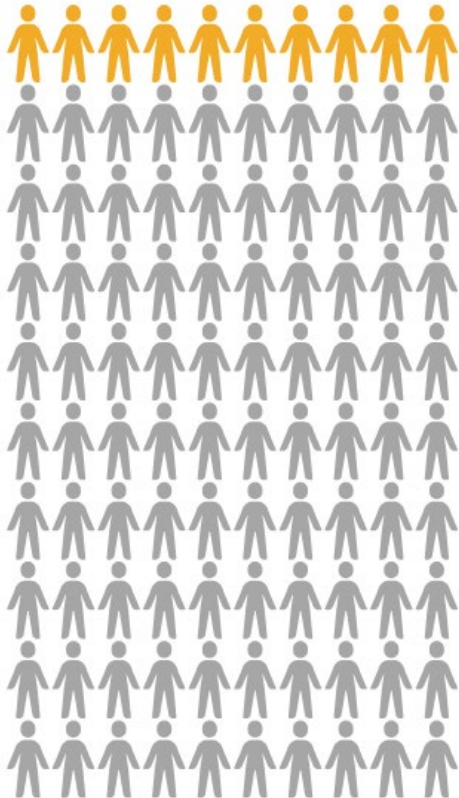# Other Ways to Build Up SOAR

- Market your program!
  - Infographics
  - Publish your outcomes on a regular basis
  - Present to community partners ("SOAR 101"), engage SOAR beneficiaries to speak
- Build relationships
  - Forge relationships with local hospitals, nonprofits, and educational institutions to create mutually beneficial partnerships. These can offer resources, funding, or additional expertise.
  - Oftentimes obtaining funding is a marathon, not a sprint. Getting your foot in the door is the first step.

What's the difference?

Approval rates for first-time applications among adults experiencing homelessness can be as low as 10%

Comparatively, the approval rate for first-time applications using the SOAR model is 75%

Graphic on NC SOAR webpage: https://www.ncceh.org/soar/

SOAR WORKS
NORTH CAROLINA

Continuum of Services

Housing Services — Coordinated Entry

SSI/SSDI benefit payments — Employment — Medicaid/Medicare insurance

COASTAL DISABILITY ADVOCATES
NEW HANOVER, PENDER, BRUNSWICK COUNTIES

BOOSTS LOCAL ECONOMY	RETURN ON INVESTMENT
$8.1 MILLION	**$1.7 MILLION**
BROUGHT INTO THE ECONOMIES OF NEW HANOVER, PENDER, & BRUNSWICK COUNTIES	**CDA SECURED $1.7M IN MEDICAID REIMBURSEMENTS TO NOVANT HEALTH - A 7.5% RETURN ON INVESTMENT**
SSI/SSDI enables individuals to contribute to their community by paying rent, buying goods, and using services.	Once an individual is approved for SSI and Medicaid, treatment providers can retroactively bill Medicaid for services.
721 PEOPLE APPROVED *1,008 PEOPLE ASSISTED*	**71% APPROVAL RATE** *AS COMPARED TO THE NATIONAL AVERAGE OF 35%*

Those experiencing or at risk of homelessness with a serious mental illness, medical impairment, and/or a co-occurring substance use disorder may be eligible for income and health benefits from the Social Security Administration they are not receiving. That's because many are unaware of it or need assistance with filing for these public benefits. SOAR (SSI/SSDI Outreach, Access, and Recovery) provides outreach and support to secure these resources, which have a positive impact on individuals in need and the communities in which they live.

North Carolina is the top fifth SOAR state in the U.S.
Coastal Disability Advocates adopted the SOAR model in 2010.

NC COALITION to end HOMELESSNESS | soar@ncceh.org | www.ncceh.org/soar/