

# 's Self-Care Plan!

**MIND**

**BODY**

**SUPPORTIVE PEOPLE IN MY LIFE**

**I WANT TO ACCOMPLISH**

**SPIRIT**

## SOAR Agency and Community Assessment

In order to create effective SOAR marketing and referral tools, we must have strong foundational knowledge of SOAR in your agency and within the community. This assessment will help guide your intentions as you work through creating a strong referral system. If you do not know the answer to a question, research it!

### Agency Assessment

- Who is providing SOAR services in your agency?
- What are the agency criteria to receive SOAR services?
- If more than one case worker in your agency is providing SOAR services, do the eligibility criteria vary between providers?
- How many in-agency referrals do you receive per month?
- Where are your referrals coming from?
- Are there any other teams or case workers who serve SOAR eligible people, but are not making SOAR referrals?
- What happens when you receive a SOAR referral from within your agency and the person does not meet program criteria?
- What strategies and efforts does your agency implement to reduce racial disparities in service delivery?

### Community Assessment

- Do you accept outside referrals?
- What agencies provide SOAR services in your community?
- What agencies refer potential SOAR applicants to you?

- How do you currently receive referrals from other agencies?
  
- Is SOAR part of coordinated entry in your CoC?
  
- Are there any agencies that serve likely SOAR-eligible people who are not making referrals?
  - If yes, what agencies?
  
- What happens when someone is referred for SOAR services from another agency, but is not eligible for your SOAR program?
  
  
- What other programs/agencies provide SSI/SSDI assistance?
  - Legal Aid?
  - Law Schools?
  - Advocacy programs?
  - Churches?
  - Other?
  
  
- What happens if a SOAR applicant is denied for SSI/SSDI on the initial application?
  
  
- What other agencies in your community, particularly those who serve diverse populations, need to know about SOAR?

## Building Your Future

### SOAR Sustainability Self-Assessment and Funding Plan Template

The SOAR TA Center is pleased to provide this two-part tool designed to help you assess and plan for actions to sustain and grow SOAR in your state, region or locality. These tools should be used with the [Funding and Sustainability](#) resources on the SOAR website and should be discussed with your [SOAR TA Center Liaison](#) who can provide individual support specific to your needs.

#### Tool #1: SOAR Sustainability Self-Assessment

Assess and understand the current financial health of your SOAR program.

*Directions: Answer these guided questions to the best of your ability. This assessment is meant to be completed by those responsible for the sustainability of SOAR programs as a part of steering committee activities.*

- 1. Action Plan:** Financial stability needs to be *planned* for. SOAR programs (small/large, new/seasoned) should have a concrete funding action plan with goals, objectives, responsible parties and deadlines.

*Does your SOAR program currently have a funding and sustainability timeline? (This could be a stand-alone document or a part of a broader strategic/action plan)      \_\_\_ Yes    \_\_\_ No*

- 2. Specificity:** While your funding plan does not need to be unnecessarily complicated, it should have enough detail to be valuable.

*Your funding plan should include the following components (Check all that apply):*

- |  |  |
|--|--|
| <input type="checkbox"/> Planning for multiple years             | <input type="checkbox"/> Completed/approved by steering committee  |
| <input type="checkbox"/> Strategies for multiple funding sources | <input type="checkbox"/> Action assignments to responsible parties |
| <input type="checkbox"/> Measurable action steps                 | <input type="checkbox"/> Deadlines for completion of action items  |
| <input type="checkbox"/> Input from all necessary stakeholders   | <input type="checkbox"/> Schedule for regular revision             |

- 3. Diversification:** A financially healthy program is one that is receiving funding from multiple sources. Programs should be positioned where SOAR activities would continue even if one funding source stopped.

*What type(s) of funding is your SOAR program currently accessing or planning to access as a part of your funding action plan? (Check all that apply)*

- |   |  |
|---|--|
| <input type="checkbox"/> Federal (e.g. CABHI, PATH) | <input type="checkbox"/> Corporate (e.g. pharmaceutical company)                         |
| <input type="checkbox"/> Medicaid                   | <input type="checkbox"/> Specialized (e.g. local plans to end homelessness)              |
| <input type="checkbox"/> State/Local                | <input type="checkbox"/> Fundraising activities (e.g. silent auctions, golf tournaments) |
| <input type="checkbox"/> Foundations                |  |

- 4. Cost of Services:** Prior to reaching out to organizations to access funding for your SOAR program, you should know the cost of the services you are proposing to provide. ([Sample budgets](#)).

*Do you have an updated budget specific to the services you provide?      \_\_\_ Yes    \_\_\_ No*

**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?*

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**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?*

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**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?*

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**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:

- |  |   |
|--|---|
| <input type="checkbox"/> Recent financial statements           | <input type="checkbox"/> Board of Directors (or steering committee)                 |
| <input type="checkbox"/> Current funding sources               | <input type="checkbox"/> Most recent IRS letter indicating your agency’s tax status |
| <input type="checkbox"/> <a href="#">Sample project budget</a> | <input type="checkbox"/> Resumes/bios of key staff, including qualifications        |
|  | <input type="checkbox"/> Most recent annual report                                  |

Agency: \_\_\_\_\_

Visit Date: \_\_\_\_\_

Agency Staff: \_\_\_\_\_

Question	Always	Some-times	Never	
<p>Are your SOAR staff receiving enough referrals? Describe how your program receives referrals. Is the number of referrals commensurate with your staffing capacity. Describe</p> <p>Note referral sources</p>				
<p>Please describe how you conduct an intake for new clients.</p>				
<p>Please describe your agency's processes for collecting medical records. Is this a standardized process or does it vary by person?</p>				
<p>Describe your staff's process for completing applications.</p> <p>Note any challenges in the process</p>				
<p>Does your staff collaborate with other SOAR workers? How much contact does your staff have with other SOAR workers?</p>				
<p>How much collaboration does your SOAR worker conduct with other agency staff? i.e. do they attend staff meetings? Receive referrals from other programs in the agency?</p>				
<p>Does your SOAR worker have a relationship with local SSA office? How much contact has your agency or SOAR worker had with the local SSA office?</p>				

Agency: \_\_\_\_\_

Visit Date: \_\_\_\_\_

Agency Staff: \_\_\_\_\_

Have you received any decisions from SSA? How many? How many are in process?				
How much contact has your SOAR worker had with DDS? How often have you needed to reach out to DDS?				
Client file: SSA 1696 SSA 8000 MSR Quality Review Prior to Submission Casenotes?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Do you have a standard data collection/data entry process?  How do you track engagement with participants?				
Do you have an internal data review process? Are you finding any trends emerging for your program?				
What would you say your program's strengths are?				
What would you say your program's challenges currently and in the coming year?				
What do you see as the biggest opportunities for the program in the year ahead?				

Agency: \_\_\_\_\_

Visit Date: \_\_\_\_\_

Agency Staff: \_\_\_\_\_

<p>What additional supports would be helpful to your program?</p> <p>Technical assistance? Training?</p>	
<p>Additional Notes</p>	