Self-Sufficiency Project
Barriers Team
Focus Group for the Housing Coalition
June 6, 2012

Background:
Last year, a few different groups separately came to the Oshkosh Area Community Foundation requesting funding to create new case management positions to help people achieve self-sufficiency. At the same time, Winnebago County was considering funding for new case management positions as well.

The Community Foundation brought the groups together, asking whether non-profits could collaborate to address some of these case management needs. So, over the last six months, a group has been meeting to try to better understand the needs and begin to brainstorm what type of collaboration might be most successful. We've reviewed some research conducted by the Self-Sufficiency Project volunteers, who asked those in poverty about the barriers they face. We've reviewed the findings of the LIFE study.

Today, we're coming to you to gain some additional insight. This is a focus group. We're going to ask you a series of questions and we want to collect your insights into how non-profits in our community could collaborate to better serve those in need and what would make your organization most likely to participate.

Here's the way this will work:

- We're going to divide into two focus groups.
- We'll go through a series of questions.
- Please write your answer to each question on a Post-it® Note.
- Then, we'll go around and discuss the answers before we post them on the flip chart, so we can have access to the notes.
- At the end of the meeting, we'll poll the tables to see what interesting ideas might be out there.

Any questions?

So, let's dive in.

Incoming Referrals
1. **What percentage of the people you serve come to you as a result of a referral?**
   Theme: Referrals represent at least 50% of each organization's incoming calls. For some organizations, referrals account for 100% of new clients.
2. **Who makes the most referrals to your organization?**
   Theme: Social service agencies (specifically the social workers in them) generate a large volume of referrals. Word of mouth among recipients is a secondary source of referrals.
3. **How do you handle people today who have needs beyond what your normal services provide?**
   a. First, what happens when someone requests – via phone or in person – a service you don't provide?
      Theme: There is no standard process among agencies. If the need is realized at intake (by the front-line staff person), an indirect referral is made using the United Way Employment & Help Guide or internal resources. Internally, staff will ask social workers for ideas as well. As a last resort, 2-1-1 is contacted.

b. **Second, what happens when someone you serve request a service in addition to those you provide?**
Theme: Social workers/case managers will, generally, make direct referrals, making a call to connect the person to the agency that can help them.

c. **What volume of requests for assistance are you not able to serve? In what particular area(s)?**
Theme: One-half of all referrals are not able to be served. This represents a significant drain on staff time. Some people can't be helped because they don't qualify or they won't support the process, even when help is available. Loans, car repairs, security deposits, rental assistance, transportation, child care, tenant/resource issues, homeowner repairs, housing (for sexual predators, convicted felons, those with poor credit).

4. **What role does your receptionist/front desk staff person play in serving those who need or request services?**

a. **What can we realistically expect of them?**
Theme: Warm, welcoming, face of the organization, connector
ADRC has a flow chart to help the receptionist figure out where to get the person to go. In most other organizations, receptionists have to use more discretion and need more tools to filter the requests. In some organizations, volunteers staff the front desk, without a great deal of training on where to refer outside the agency.

Assessing Needs

5. **What are the top 5 pieces of information you need to collect from someone to determine whether you can help meet their need?**
Theme: Income. Residency in Winnebago County. Family size. Ages of those in household. What's the issue? Sobriety. Have you already contacted Bridges?

a. **If a number of agencies developed a mini-assessment that contained that information, how useful would that be to your organization?**
Theme: Another group is working on a similar initiative, e.g.: CADASI, Legal Action of Wisconsin, ADVOCAP, Day By Day Warming Shelter

b. **How useful would that be to the people you serve?**
Theme: Despite a desire to collaborate, there is lots of skepticism about whether this would work. Barriers to adoption would include: Confidentiality, existing processes already effective, staff time limitations. There were references to Green Bay having a useful model.

c. **How likely would you be to use something like that?**
Theme: Even those agencies that were opposed to adopting a shared mini-assessment (from an agency perspective) felt it would be useful from a client perspective.

d. **How useful would a mini-assessment be to your organization?**

Training

6. **What, if any, training do you provide to your receptionists/front desk staff to make referrals?**

a. **Would training/modeling be helpful?**
Theme: Training is generally limited among agencies. While one agency had a sophisticated flow chart to aid front-line staff members, few other agencies had formal training processes related to referrals. One agency has an internal database to reference referrals that have been made from the organization in the past. Agencies expressed an interest and acknowledged they would benefit from having training coordinated and

available.

Referral Sources

7. **How do you currently use 2-1-1?**
   Theme: Generally, agencies described referring to 2-1-1 as a referral of last resort. In part, that is due to the fact that they rely on internal staff, the Oshkosh Area United Way Employment & Help Guide. Problems were cited with the referral database for multi-location organizations and for after-hours calls. One participant mentioned using Google first.
   a. **How frequently, if ever, do you regularly update your 2-1-1 listings?**
      Theme: People in the groups were unaware how frequently their listings are updated.
   b. Why?
8. **If you had access to a network of experts – who could tell you where people could get services?**
   a. **Would you use it? Why or why not?**
      Theme: Generally, there was interest in the expert network, in part because it's building on what participants are already doing in developing their own networks. There were some concerns that it would not become too time-intensive. There is interest in a technological solution.
   b. **What resources would you devote to something like that?**
      Theme: There is positive interest in participating, but there may be some barriers to overcome, depending on funding sources and the amount of time required.
   c. **If you are interested in the network, what is the most convenient way to provide you with info requests?**
      Theme: Some expressed interest in an FAQ where staff and volunteers could look at how similar problems were addressed in the past. The face-to-face case managers' network could be a model on which to base a technological solution. Live chat via 2-1-1 (or separately) is the preferred method in which to operate a network.

Follow Up

9. **If someone in your agency makes a referral, what follow up do you do to see whether they received the service?**
   Theme: If they are an existing client, there is follow-up. If they are a new caller and the need cannot be met, there is no follow up. Even those organizations with tracking systems don't necessarily follow up if it is outside the scope of the agency's work. Time is the primary constraint to follow-ups.
10. **What if you can't find anyone to help them? Where are those gaps catalogued?**
    Theme: ADRC has the most substantial gap-tracking tool. It is tracked within their client relationship management database. A few organizations said they have more limited abilities to track gaps for their own purposes. Some tracking occurs in service point database. For many organizations, there is nowhere to track these gaps.

General

11. **What do you think is working best in our referral system?**
    Theme: Agencies and Winnebago County provide timely responses and collaborate. Existing networks are helpful. Personal contacts make the biggest difference in getting a client help.
12. **What could use the most improvement?**
    Theme: Tracking. Keeping up with changes in other people's programs. Serving those who can't ask for help during regular business hours. Inconsistencies among staff in applying rules,

timeliness of response. Need for coaching – e.g.: setting a goal, follow-through.

13. **What else should we have thought to ask you that we haven't?**
    Theme: There are more people now who are in need for the first time. There is a desire to engage the people who are being served.