

Memorandum

To: Barrier Busters Network Group

From: Emily Arents, Barrier Busters Intern

Re: Review of Barrier Busters Requests – November 28, 2007

I. Background and Purpose

Per recommendation of the Utilization Subcommittee, approved at the 25 July meeting of the Barrier Busters Network Group, a review of all Barrier Busters requests since 1 May 2006 was completed. The first review of Barrier Busters requests, completed in May of 2006 by Andrea Plevak, included all requests before 1 May 2006. This second review included requests beginning in May 2006, and until August 15, 2007.

The purpose of the review was to get a general understanding of the information collected by agencies after an individual Barrier Buster submits a request on behalf of a consumer. Findings of this review were intended to assist individual Barrier Busters in their submission of requests, and to provide information for the Network Group about best practices for policy changes and for meeting funds guidelines.

II. Procedure

Twenty-five agencies made 436 requests during the period in question. All agencies were asked to provide any materials or records related to the request, including:

- Barrier Busters release
- Any information relating to consumer's need for assistance
- Any record of other sources of funding or assistance (if appropriate)

These criteria were loosely developed according to individual funds' guidelines. Barrier Busters releases of information were reviewed for every request in question. Full case files for individual requests were reviewed for a randomly selected portion of agencies' requests. For all agencies, at least 45% of all requests were reviewed in great detail, according to the criteria listed above.

III. Findings

There was great diversity in the quantity and nature of the information retained by agencies after Barrier Busters requests have been completed.

Especially among those individuals who were relatively new to the Barrier Busters request process, there was a great deal of confusion about the best ways to prepare for and make a request. Many Barrier Busters expressed the need for some orientation or training about the request-making process, best ways to retain and maintain case files for recipients of Barrier Busters assistance, and development of a checklist.

Another issue that emerged came from those agencies utilizing telephone conversation for much, or most, communication with consumers. Because it is often impractical or impossible for all verification (or Release of Information) to be completed in writing, there was general confusion about the best ways to maintain adequate records for requests.

IV. Recommendations

Based on the information gleaned from this review, the following recommendations are made by this reviewer:

1. File Maintenance. Network Group members should maintain files (electronic or hard copy) of the information required by the Barrier Busters Network Guidelines (see attached). Even if consumers are not regular clients of the agency submitting the request, or if the consumer terminates his/her relationship with said agency, a minimum of information should be retained about the request. These should include:

- ✓ Barrier Busters Release of Information
- ✓ Verification^{*} of consumer's emergency or need
- ✓ Verification^{*}, when possible, of other funding sources consulted

This checklist should serve as a guide for those individuals with questions, but should not necessarily be considered a list of inflexible requirements or rules.

2. Orientation Guide. All new Network Group members should be provided with a guide outlining the requests process, including

* The requirement of "verification" is not limited to written materials. For those agencies conducting business by phone, case notes including (phone) verification information is appropriate.

information about funding requirements and basic information about best practices for request submission. Guidelines for individual funds within the Unmet Needs Fund should be public to Network Group members to ensure most efficient and appropriate requests.

3. Adjustments to Release Form. The existing Barrier Busters Release of Information should be adjusted to include phone releases as valid means of consent for release. Two staff witnesses should be required for a phone release. Currently, only one staff witness is required for written releases.

Barrier Busters Network

Authorization to Release Information

I, _____ hereby authorize the Agencies,
(Print Name)

Organizations and/or Persons listed below, as well as future agencies that sign onto a Barrier Busters Membership Agreement, to disclose the following information about me (if consent is obtained by phone, a list of participating agencies may be provided to the applicant upon request): name, support needs, and any additional information necessary to substantiate a Barrier Buster Unmet Needs fund request. I understand that this information will be available to Barrier Busters member agencies in the form of a shared electronic database.

I understand that the purpose of this disclosure is to ensure best coordination of support and to enable the Barrier Buster Coordinating Group to conduct its own internal evaluation. I also understand this consent is valid for two years from the date signed.

- 211 Regional Call Center
- B&B Payee Services
- American Red Cross - Washtenaw County
- Catholic Social Services
- The Center for Independent Living
- Childcare Network
- Community Action Network
- Community Supports and Treatment Services
- Community Corrections
- The Corner Health Center
- Department of Human Services - Washtenaw County
- Domestic Violence Project/SAFEHouse
- Education Project for Homeless Youth
- Employment Training and Community Services (ETCS)
- Friends in Deed
- HIV/AIDS Resource Center (HARC)
- Housing Bureau for Seniors
- Interfaith Hospitality Network - Alpha House
- Jewish Family Services
- Judson Center
- Legal Services of South Central Michigan
- Michigan Ability Partners
- MSU Extension Service
- Neighborhood Senior Services
- Ozone House
- Pediatric Advocacy Initiative
- POWER, Inc.
- Public Health of Washtenaw County
- Salvation Army of Washtenaw County
- Shelter Association of Washtenaw
- SOS Community Services
- St. Joseph Mercy – Senior Health Services
- Turner Geriatric Clinic – UM
- UM Hospital – Social Work Department
- Veteran Services
- Washtenaw Community Health Organization
- Washtenaw County – Community Collaborative
- Washtenaw Community College
- Washtenaw Health Plan
- Washtenaw Housing Alliance
- The Women’s Center of Southeastern Michigan

Per phone conversation on the ____ (day) of _____ (month), 2008/2009, the above named Barrier Buster Unmet Needs Fund applicant gave consent to the release of information as detailed above.

Applicant requests list of Barrier Buster member agencies.

Applicant Signature

Date

Witness Signature

Date

Second Witness Signature*

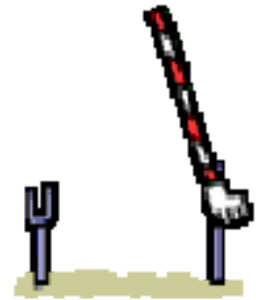
Date

**(Necessary only in the event that consent is obtained by phone)*

***Please direct questions to the case manager or the individual providing release. Barrier Busters is a collaboration of the agencies listed above; the Emergency Unmet Needs fund is accessible only through a member agency.*

Barrier Busters

Request Documentation Checklist



1. Barrier Busters Release
 - a. Any updates to the release will be distributed to the Network Group to all Barrier Busters by email, and posted on the Barrier Busters website: www.ewashtenaw.org/barrierbusters
 - b. Release of Information by Phone.
2. Verification of the amount that was requested (dated)
 - a. Where did the number come from?
 - b. What was the total amount?

Examples: eviction notice, landlord notification of outstanding balance, DTE shutoff notice, bill or invoice, case notes of conversation with landlord, etc.

3. Verification that other funds were consulted, when possible
 - a. What other agencies did the consumer request funding from?
 - b. What funding sources were consulted for this emergency?

Examples: SER Notice (of assistance denied or approved), application for funding, dated check from agency, etc.