This document aims to guide communities in creating comprehensive outreach policies and procedures that align with the BFZ initial quality data standards. Communities can use this guide as a starting point for developing their own outreach policies and are encouraged to adapt this guide to their local context.

Things to consider when creating outreach policies:

* Decide which stakeholders are involved in drafting and approving these policies. It is **highly** recommended that you involve persons with lived experience and expertise and frontline staff in creating outreach policies and procedures. BFZ increasingly finds that communities who engage these groups develop more equitable, responsive, and effective policies.
* Decide where your outreach policy will live. Communities have developed outreach policies in a standalone document or as part of other policies and procedures, such as coordinated entry, HMIS, and by-name dataset Operations Manuals. Communities should decide which method works best for them, and BFZ doesn’t prescribe a specific way to create outreach policy. **Regardless, it’s recommended that wherever this policy lives, all the needed information is centralized and easily accessible to stakeholders.** This will help your community come to a shared understanding of how outreach is coordinated to effectively serve individuals experiencing unsheltered homelessness.
* Build **concrete feedback loops** to help your community ensure that your outreach policy is successfully implemented. For example, include ways that staff will continuously monitor the implementation of the outreach policy or include details about how and when this policy will be evaluated and revised.

Structure of this guide:

1. The guide first lists **sections of outreach policies and procedures** that BFZ recommends a community develop. Consider these sections as key components of an outreach policy to develop, rather than a prescribed structure you must follow as you write your policy.
2. There are companion  **workshopped community examples** from the BFZ network which you can find on the [Outreach Policy Guide section of the BFZ Quality Data Toolkit](https://login.builtforzero.org/hubs/resources/bfz-outreach-policy-guide/). The BFZ Data Coaching Team has compiled examples of outreach policies developed by communities nationwide. Each policy was selected because it is a real example of how communities approached the task of developing an inactive policy, not because it aligns perfectly with this guide. BFZ data coaches adapted some elements of these policies to make them more transferable, annotated each policy to highlight the key components from the guide, and included suggestions for continuous improvement.

## Suggested ways to use this guide to build an outreach policy:

1. Review the **suggested information** and consider what policies and procedures exist informally or in a written document that covers these topics. Then, determine which parts of the policy need to be developed from scratch.
   * If the information is scattered across documents, consider how you can create an outreach policy that centralizes the information but is consistent across sources.
2. Consider the **recommendations for developing a section** as you brainstorm how to amend existing information or create new content for your policy.
3. Review the **workshopped BFZ policies** to help you overcome the dreaded writer’s block. You can use the workshopped policies to start thinking about structure and language for your policy. These examples are publicly available, so feel free to copy language if it’s relevant to your community.

# Section 1: Introduction and Definitions

## Suggested information to include in this section:

1. Why it is important to conduct comprehensive outreach activities
   1. Goal and purpose of outreach and inreach in your community
   2. Guiding values and principles of your community’s outreach work
2. The definition of [outreach and inreach](https://login.builtforzero.org/hubs/quality-data-toolkit/outreach-coverage/) (follow the link for BfZ definitions of each term)
3. Description (or map) of your community’s geographic boundaries

### Recommendations for developing this section of your outreach policy:

* The introduction sets the tone of the policy; it can be helpful to emphasize a shared commitment to supporting client’s self-identified needs with a trauma-informed and person-centered approach.

# Section 2: Outreach Capacity and Coordination

## Suggested information to include in this section:

1. Description of the agencies conducting street outreach and staffing capacity for each outreach team
   1. This list can be a separate “living document.”
2. Description of how outreach teams operate, including:
   1. How teams connect individuals to housing and self-determined needs, and
   2. How teams account for all individuals who are unsheltered.
3. Protocols for service provision including:
   1. Training requirements
   2. The “dos and don’ts” of outreach service provision, and
   3. Safety considerations.
4. Description of how and when outreach teams collaborate both formally and informally to:
   1. Reduce duplication of services,
   2. Support care coordination across teams or counties, and
   3. Judiciously utilize limited resources.

# Section 3: Outreach Coverage and Deployment Strategies

## Suggested information to include in this section:

1. Overview of geographic coverage area and description of how/where outreach staff are deployed into the community
   1. This may be an actual map indicating the areas that outreach staff canvas or a list describing how outreach staff are deployed. This map or list may be a separate living document.
   2. If outreach staff are typically deployed through service requests, explain any outreach referral pathways and the process implemented to fulfill the request for service.
2. Frequency and process for regularly assessing and updating outreach coverage across the geographic area
   1. Include any details on what information is used to update outreach coverage areas (i.e., information from law enforcement, hospitals, and other adjacent systems; PIT data; identification of new hotspots, etc.)
   2. The process to involve community’s outreach teams to:
      1. Develop feedback loops to assess and update coverage area and schedule
      2. Approve and socialize outreach policies and procedures
3. Outreach referral pathways and community partnerships
   1. Describe how outreach teams work with community partners to provide education about available services. For example, are services listed through hotlines, resource networks, or online?
   2. If community partners and the public can request services for unsheltered individuals in need, describe how the services can be requested and how the referral pathways are socialized throughout the community (flyers, information events, etc.).

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### Recommendations for developing this section of your outreach policy:

* Involve persons with lived experience and expertise in conducting your outreach and/or informing your outreach strategies and locations so that you are aware of what’s happening on the ground.
* If your community is able to estimate the number of people experiencing unsheltered homelessness in a given month, it can be helpful to compare this number to the most recent unsheltered PIT count. This can increase confidence that your community’s outreach coverage is comprehensive.

# Section 4: Data Collection and Progressive Engagement

## Suggested information to include in this section:

1. Description of the procedures to collect outreach data, including:
   1. Expectations of how outreach staff collect data while in the field (i.e., tablets, apps, or paper intake forms).
      1. If paper documents are collected, include expectations of how the data is entered and who is responsible for entering the data.
2. Explanation of the process if an unsheltered client declines to sign a release of information (ROI) or share personal identifiable information (PII), including:
   1. Recognition of a client’s right to refuse any or all services for any reason
   2. Underscoring the importance of progressive engagement and rapport building
   3. Guidance if teams are able to collect minimal information and/or create anonymous profiles to support accurate reporting on all individuals experiencing unsheltered homelessness.

**Recommendations for developing this section of your outreach policy:**

* Collaborate with persons with lived experience and expertise to develop best practices for including individuals who decline services in reporting while being mindful of consent and respectful of personal choice.