National Veterans' Technical Assistance Center (NVTAC)
Homeless Veterans' Reintegration Program (HVRP) Community of Practice (CoP)
Standard Operating Procedures for HVRP Operations
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NVTAC Staff

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Key Points

- **Introduction**
  - This session defined and provided examples of standard operating procedures (SOP) that are required or necessary for HVRP operations.
- **Overview of SOPs**
  - An SOP is a document that outlines steps, processes, and expectations for aspects of an organization's daily operations to ensure services are uninterrupted in the event of unexpected circumstances (i.e., leadership changes). *This training discusses both required and recommended SOPs.*
  - The U.S. Department of Labor, Veterans' Employment and Training Service (DOL/VETS) outlines required SOPs, and required SOP contents, in policy.
    - Veterans' Program Letter (VPL) 06-24 states that HVRP grant recipients must have an SOP on the use of participant support costs and incentives.
      - An SOP on incentives must include several elements as required by policy, including identifying the amount and type of incentive, criteria for participant issuance, etc.
    - The Funding Opportunity Announcement (FOA) states grant recipients must have an SOP to use HVRP funds for participant wages.
  - Program Leadership should have SOPs in key areas relevant to program operations: staffing, case file maintenance and auditing, training, community partnerships, workflow, and daily operations.
    - Everything your program does should correspond to an SOP that justifies the activity and expenditure.
  - NVTAC has an example SOP available on our website: COJ SOP for HVRP
- **Operational SOP Policy**
  - SOP: written guidance on how HVRP staff perform daily functions in alignment with HVRP requirements to ensure compliance and accountability.
  - Examples of HVRP processes that would benefit from an SOP: eligibility determinations, outreach, case management, supportive services, employer engagement, job placement, and data reporting.

- As there are no standardized forms or required methods for these processes, SOPs clarify how decisions are made, how services are provided, and how data is captured.
  - Program leadership should:
    - Clearly define key positions (i.e., job developer) at your organization to ensure staff understand HVRP's purpose and their role in the program's success. This reduces turnover and improves veterans' outcomes.
    - Create a welcome packet to orient new hires. Recommended contents for welcome materials include HVRP overview, workflows (intake to placement), directory of key contacts, sample client documents, SOPs, and a 30-day onboarding checklist with a training schedule.
    - Organize and maintain SOPs in an accessible format and train staff to apply them. For example, creating a shared SharePoint folder titled "HVRP SOP Manual" organized by topic.
    - Offer opportunities for continuous training and professional development to ensure staff are capable in their roles and compliant with policy. For example, building a training calendar that includes required trainings necessary for each role, optional skill building, peer learning, and performance reviews.
    - Write SOPs covering case file maintenance and auditing. This is essential for credibility, compliance, and audit readiness. It should include information on required documents (i.e., DD-214), file storage standards, deadlines, and internal audit protocols. For example, mandating a review of every case file quarterly using an approved checklist.
- **When to Access NVTAC and the National Veterans' Training Institute (NVTI)**
  - NVTAC and NVTI are NOT punitive. HVRP grant recipients can request training and assistance at any time, not only when your program is experiencing challenges. It is best practice to connect with NVTAC and NVTI as soon as your organization is awarded.
  - NVTAC provides training and one-on-one technical assistance (TA) to HVRP grant recipients throughout their period of performance to increase their ability to establish and operate successful grants and ensure challenges are resolved quickly. For questions or to request TA, reach out to NVTAC at nvtac@dol.gov or visit the website at nvtac.org.
  - NVTI provides training opportunities for HVRP staff, including program managers and financial staff. You can access their courses at nvti.org.
- **Community Partnerships: Stakeholder and Employer Management**
  - Creating a Memorandum of Understanding (MOU) with community partners and employers can streamline the relationship between HVRP and stakeholders.
  - Ensure decisions are veteran-centered and a release of information (ROI) is in place to protect client privacy.

- Maintain a mechanism to track relationships with external partners and ensure follow-up/follow through are taking place.
- **How to Structure a Workday?**
  - It is essential to have robust onboarding tools available to staff, including onboarding documents, staff flowcharts, and internal policies on day-to-day activities.
    - Include staff in the creation of internal policies, clarify expectations for staff, and emphasize healthy boundaries with participants.
  - Build time to meet with HVRP case managers to review their case files and case conference with participants' external case managers (i.e., housing, social workers) for clarity and consistency.
  - Outline expectations for staff activities on a daily, weekly, monthly, and quarterly basis. For example, staff should be searching for job leads, checking in with clients daily, and auditing case files for accuracy monthly.
  - Ensure HVRP staff have the training, education, tools, and resources necessary to be successful in providing quality services. For example:
    - Trainings on trauma-informed care concepts and secondary trauma.
    - Easy access to relevant materials (i.e., HVRP program goals, budget).
  - Create a culture of openness and opportunity to increase staff morale. For example: establishing trust, continuously improving processes through staff feedback, encouraging collaboration, offering learning opportunities, fostering leadership, and promoting selfcare for staff.

Discussion/Question and Answer (Q&A)

- **NVTAC Question**
  - What SOPs have been most vital to providing high quality, consistent services? Do you have any examples and/or tips on how you have created SOPs for these purposes?
  - Responses:
    - Supportive services SOPs offer staff guidance on how to spend grant funding for supportive services, including approval processes, who it is submitted to, who does ordering/purchasing, uploading information to client files, documents (client sign-off), and checks to ensure it is reasonable/allowable/allocable.
    - SOPs on writing effective case notes, case management, job-driven training, client "no show" prevention, and client assistance.
    - Standardize how service coordinators do their jobs. Review all tasks to better serve veterans, ensure case management is not an assumption but a written policy with standards.
    - Training, including defining it and ensuring veterans' participation.
    - Temporary Financial Assistance (TFA) SOPs to ensure grant money is spent as intended and according to policy.

Conclusion

SOPs are written policies that outline expectations and requirements for different aspects of an organization's daily operations. Award Terms and Conditions, the FOA, VPLs, and other policies, outline SOPs that HVRP grant recipients are required to maintain, such as those regarding the expense of participant support costs and incentives. Organizations, their staff, and clients benefit from an HVRP maintaining streamlined and consistent expectations for all aspects of program administration, from case management standards to case file maintenance requirements and beyond. For support creating SOPs to benefit your HVRP, consider using SOP examples at NVTAC's website or reaching out to NVTAC at nvtac@dol.gov to schedule TA.