

WILLIAM S. DAVIES HOMELESS SHELTERS, INC.



OPERATIONS MANUAL

2026

[This document has been redacted for public portfolio use. Staff names, facility addresses, contact information, financial details, and security procedures have been generalized to protect the privacy and safety of guests and staff.]



THE WILLIAM S DAVIES HOMELESS SHELTERS, INC.

OPERATIONS MANUAL

2026 draft



Comprehensive Guide to Shelter Operations,
Guest Services, and Organizational Standards

Revised: February 2026

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SECTION 1: INTRODUCTION & HOW TO USE THIS MANUAL

Welcome to The Davies Shelters Operations Manual. This comprehensive guide documents our shelter operations, guest services, and organizational standards. It serves as the definitive reference for all staff, volunteers, and leadership.

PURPOSE OF THIS MANUAL

This manual provides:

- Clear operational procedures for daily shelter management
- Guest service standards and policies
- Emergency protocols and safety procedures
- Technology systems documentation (EcoSystem App)
- Privacy, ethics, and professional conduct standards
- Role definitions and decision-making authority

IMPORTANT NOTES

Verification Required:

Content marked with requires verification with leadership before relying on these procedures.

Related Documents:

This Operations Manual is companion to the Employee Handbook. Employment policies, benefits, and HR procedures are documented separately in the Employee Handbook.

Living Document:

This manual is regularly updated as procedures evolve. Always refer to the most recent version.

SECTION 2: ORGANIZATION OVERVIEW

MISSION & CORE PURPOSE

The Davies Shelters serves neighbors experiencing homelessness with dignity, hospitality, and restoration. We provide emergency shelter, case management, and supportive services to help individuals and families achieve housing stability and self-sufficiency.

FACILITIES

Men's Shelter:

- Capacity: [CAPACITY]
- Address: [Address Redacted]
- Tornado Shelter Location: Shelter bathrooms & Night Staff Sleeping Area
- Emergency Assembly Point: Parking lot
- Emergency Equipment Locations: [LOCATION]

Women's Shelter:

- Capacity: [CAPACITY]
- Address: [Address Redacted]
- Tornado Shelter Location: Ground-Level Walk-in closet in the Library
- Emergency Assembly Point: Playground
- Emergency Equipment Locations: [LOCATION]

SERVICES PROVIDED

- Emergency shelter (30-day to 5-month programs)
- Intensive case management
- Daily meals (breakfast and dinner, & sack lunches by request)
- Medication management
- Professional counseling access

- Life skills development
- Resource coordination and referrals
- Housing stability support

SECTION 3: PROGRAMS

Case Management

Purpose

Provide structured, documented support that helps guests stabilize, remove barriers, and progress toward sustainable housing and income.

Scope

Applies to guests who participate in Case Management under the shelter's program pathways and to staff responsible for case planning, referrals, and discharge coordination.

Policy

Case Management is the shelter's primary service-planning and accountability framework. Case Managers coordinate goal-setting, referrals, and follow-up using documented case meetings and verified information. Case Management supports operational decision-making related to program compliance, safety, and discharge planning.

Procedures

Intake Assessment and Service Planning

- Complete an initial needs assessment during intake and early stay.
- Establish measurable goals and timelines (housing, income, ID, benefits, health, legal, family stability).

Case Meetings

- Schedule and conduct case meetings based on program requirements.
- Review progress, barriers, and next steps at each meeting.

Resource Navigation

- Provide referrals and coordinate with community partners as available (housing, workforce, healthcare, benefits, legal).
- Support document recovery and benefits navigation as appropriate.

Accountability and Compliance Support

- Reinforce shelter expectations and phase requirements (if applicable).
- Escalate concerns per incident, safety, and discharge procedures.

Discharge and Transition Planning

- Begin discharge planning early for all guests.
- Confirm a realistic next step and coordinate follow-up resources when possible.

Documentation and Records

- Case meeting notes (date, purpose, outcomes, next steps)
- Goal plan updates and barrier notes
- Referrals made and follow-up status
- Program status changes (phase movement, noncompliance, discharge planning notes)

SECTION 4: ROLES, STAFFING MODEL, AND COMMUNICATION

ROLES

EXECUTIVE DIRECTOR

Contact: [EXECUTIVE DIRECTOR]

Responsibilities:

- Provides executive leadership across the organization
- Acts as professional liaison with Board of Directors to execute and implement mission and vision as adopted by the board
- Provides fiscal oversight alongside the Board of Directors
- Manages the overall direction and ethos of the organization
- Connects the community to the organization's mission and vision through volunteer opportunities, speaking engagements, donor stewardship, and community partnerships
- Manages Shelter Staff and Operations
- Sets and measures objectives, operating policies and procedures
- Grant Writing
- Manages community outreach initiatives
- Oversees all aspects of fundraising and communications strategy for the organization

- Develops and implements an organizational strategy for resource development including individual donors, major gifts, foundation or corporate giving, and grants
- Develops case management protocols and contacts across the organization

ADMINISTRATOR

Contact: [DEVELOPMENT ADMINISTRATOR]

Responsibilities:

- Bookkeeping, Budgeting, liaison with Accountants
- Acts as liaison with Board of Directors for Budgeting and Finance
- Manages bookkeeping, purchasing, budgeting, human resources
- Accounts Receivable
- Website, Social Media, Digital Services & Subscriptions Management
- Branding, Marketing, & Communications
- Manages day-to-day communications for the organization including public relations, promotional materials, and digital communications
- Ensures compliance and reporting requirements are met for all foundation and government grants
- Data Storage, Security & Compliance
- Digital Systems Creation & Maintenance
- Donor Management

OPERATIONS MANAGER

Contact: [OPERATIONS MANAGER]

Responsibilities:

- Oversees day-to-day operations of all programs
- Manages timesheets and payroll
- Coordinates Facility Maintenance for both shelters
- Communicates Shelter needs to Executive Director and Admin for purchasing
- Responsible for all shift scheduling

COUNSELING DIRECTOR

Contact: [COUNSELING MANAGER]

Responsibilities:

- Counseling

CASE MANAGERS

Contact: John Wililams (M), [CASE MANAGER - W]

Responsibilities:

- Maintains a caseload of clients and meets with them weekly
- Responsible for the collaborative design and implementation of client case plans
- Holds case meetings at least twice per month with each client (frequency increases in Phase 1)
- Provides guidance and therapeutic encouragement
- AUTHORITY TO ISSUE FORMAL INFRACTIONS: ONLY Case Managers can issue formal write-ups and enforce accountability measures including verbal warnings and written warnings for infractions
- Collaborates and communicates with other local agencies regarding case plans
- Manages and tracks client records and files in EcoSystem App

EVENING, OVERNIGHT, & WEEKEND MANAGERS (NIGHT MANAGERS)

Contact: [NIGHT MANAGER - M], [NIGHT MANAGER - W]

Responsibilities:

- Responsible for security of the facility and overseeing the well-being of the clients while they are on location during their shift
- Daily intake of new guests
- Serving meals to Guests
- Dispensing medications as prescribed
- Maintaining and updating client chore lists
- Ensuring daily chores are completed
- Securing the building and arming/disarming the alarm
- Completing shift reports and Night Watch records in EcoSystem App

FARM MANAGER

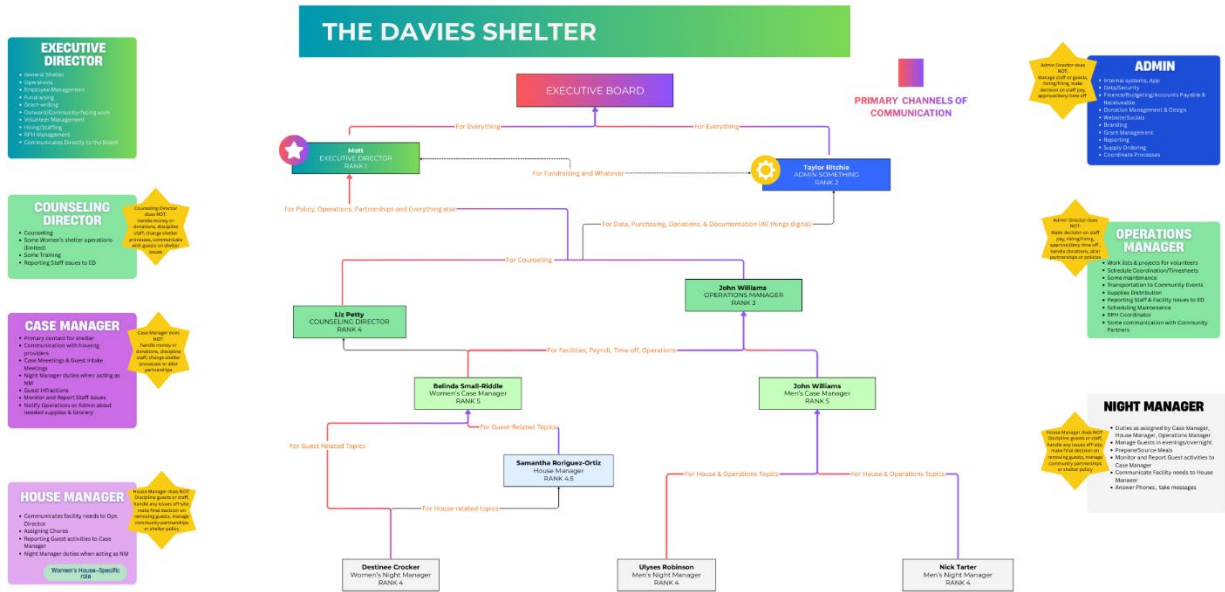
Contact: Brad Swancy

Responsibilities:

- Oversees and manages all aspects of vegetable production at the community gardens and farm
- Manages farm volunteers and employees

STAFFING MODEL

Organization Chart



COMMUNICATIONS

Chain of Command

To ensure clear decision-making, consistent direction, and timely escalation of issues that affect guest safety, staff operations, and organizational risk.

Policy

All staff communications related to shelter operations must follow the established chain of command. Staff will direct questions, concerns, and requests to their immediate supervisor first, unless an emergency requires immediate action (for example: calling 911). Using the chain of command prevents conflicting instructions, supports accountability, and ensures leadership has accurate information when decisions are required.

Expectations

- Staff will communicate operational concerns through the next level of supervision before contacting higher-level leadership.

- Staff will not bypass supervisors to seek a different answer (“decision shopping”) or create side channels that exclude responsible leadership.
- Supervisors are responsible for escalating issues promptly when they exceed their authority, involve safety risk, or require leadership approval.
- Documentation of significant issues will be completed according to reporting and incident procedures.

After-Hours Escalation

After hours, staff will follow the established escalation chain: Case Manager → Operations M

STAFF MEETINGS

Staff meetings are held weekly and may be split by shelter location. Meeting times vary based on staff availability and will be communicated by the Director of Operations.

SHIFT COVERAGE

- Director of Operations is responsible for all shift scheduling
- Shift coverage is scheduled in accordance with the needs of the shelter for day, evening, night, and weekend shifts

SECTION 5: DAILY OPERATIONS & RESPONSIBILITIES

SHIFT RESPONSIBILITIES

All shifts are responsible for:

- Completing a Shift Report during each shift
- Reviewing shift report with arriving staff during change of shift
- Maintaining a record of the shift events [daily log]
- Documenting supervision given for guest chores
- Recording any donations (items only) made during shifts
- Reviewing the Daily Log from the last 2 days worked to the beginning of the current shift (staff should initial to verify review)

OVERNIGHT SHIFT DUTIES

Night/House/Case Managers are responsible for:

- Ensure completion of chores by guests using check-off list
- Guest check-in between 5:00-6:00pm (weekdays) or 2:00-6:00pm (weekends)
- Serving meals to guests
- Dispensing evening medications (7:30 PM unless prescription states otherwise)
- Lights out enforcement at 10:00 PM
- Security rounds during overnight hours
- Alarm system armed at 10:00 PM
- Facility security and guest well-being monitoring
- Emergency readiness (phone accessible, know emergency contacts)

MORNING TRANSITION DUTIES

Night/House/Case Managers are responsible for:

- Alarm system deactivated at 6:00 AM
- Dispensing morning medications (7:30 AM unless prescription states otherwise)
- Serving breakfast to guests
- Guest check-out by 8:00 AM (weekdays) or 9:00 AM (weekends)
- Chore supervision and verification using check-off list
- Ensuring guests depart by designated times

CHORE ASSIGNMENT AND SUPERVISION

- Night Managers maintain and update client chore lists
- Chores are assigned to each guest
- Staff supervise completion of chores using check-off list
- Chores must be completed before guests leave the shelter in the morning
- Staff document supervision of chores in shift reports

SECTION 6: GUEST ASSESSMENT & INTAKE

EcoSystem App Guest Intake Procedures

Purpose and Scope

The EcoSystem App is the primary system of record for guest information, case meetings, and key shelter operations. This section defines the standard intake workflow and required documentation practices for admitting a new guest into the system.

How To

App Orientation

Upon opening the EcoSystem App, staff land on the Shelter Calendar. The calendar displays scheduled case meetings and may also display additional operational events as functionality expands (for example: staff meetings, volunteer events, scheduled workers).

Left Navigation Pane:

Lists the areas of the app available to the user based on assigned security permissions. Most guest-management areas include two primary record interfaces:

Views:

List screens used to locate and filter records. “Active” views support day-to-day operations. “Inactive” views typically contain discharged or expired records.

Forms:

Detail screens used to enter, update, and review information on an individual record.

Help Pane:

The Help Pane is available from the question mark icon in the top-right corner of the app. The Help Pane provides page purpose notes and field-format guidance. Staff should reference it when uncertain about required formatting or usage.

Data Integrity Requirements

Accurate and complete data entry is a mandatory staff responsibility. Information captured in the EcoSystem App supports shelter operations, grant reporting, and funding applications. Missing or inaccurate documentation can create compliance risk, reduce reporting reliability, and limit service delivery.

- Staff will enter current, verified information to the greatest extent possible at the time of intake.
- Fields will only be left blank when information is truly unavailable.
- The Administrator will conduct periodic completeness and accuracy reviews.
- Repeated documentation deficiencies will be addressed through progressive corrective action.

Privacy Note: Guest data entered in the EcoSystem App is used for shelter reporting and operations and is not shared outside The Davies Shelters under the organization's privacy policy.

SECTION 7: PHASE SYSTEM AND CASE MANAGEMENT

Overview

The Davies Shelters provides two service pathways:

- With Case Plan: Structured program up to 5 months with intensive case management.
- Without Case Plan: 30-day emergency shelter option with basic services.

Guests select a pathway during intake and sign the applicable agreement.

Pathway 1: With Case Plan (5-Month Program)

Phase One: Month One

Guest requirements:

- 4 case meetings in 4 weeks
- 6:00 pm curfew (out 8:00 am to 6:00 pm)

- Random alcohol and drug tests
- Purposeful work
- Create and follow a budget

Phase Two: Months Two and Three

Guest requirements:

- 6 case meetings in 8 weeks (weeks without meetings are scheduled in advance)
- Access to free, professional counseling
- Free, professional haircut from a stylist in her salon
- Curfew extended to 10:00 pm one night per week for a pre-planned, approved event
- Purposeful work and adherence to budget
- No write-ups

Phase Three: Months Four and Five

Guest requirements:

- 4 case meetings in 8 weeks (weeks without meetings are scheduled in advance)
- Month 4: Curfew extended to 10:00 pm
- Month 5: Pre-planned and approved overnight stay for events
- Purposeful work and adherence to budget
- No write-ups

Phase Advancement

Guests request advancement using one of the following:

- A written/typed letter explaining why they should advance, or
- An oral defense presentation to the case manager

Staff evaluate progress and make a determination based on documented completion of phase requirements.

Dismissal from Program

Three write-ups, combined with additional rule violations, may result in dismissal from the program at any point during the guest's stay.

Pathway 2: Without Case Plan (30-Day Option)

Guest requirements:

- Stay is limited to 30 consecutive days contingent on compliance
- Guest must follow all shelter rules and guidelines
- No case management services
- No phase advancement and no extension beyond 30 days
- Three write-ups, combined with additional rule violations, may result in dismissal before the 30-day period ends

Agreement Forms

All guests must sign one of the following:

With Case Plan Agreement

"The signature at the bottom of this document signifies that I, [Guest Name], on [Date], have decided and agreed to have a case plan with [Case Manager Name] for the duration of my stay at The Davies Shelter. I agree to the terms of this case plan and understand that I must fulfill each of the requirements from each phase before moving on to the next. I understand that staff and case managers will make a fair decision on my progress in this program, and I will advocate for myself via a (check one): written/typed letter OR an oral defense on why I should move to the next phase. I understand that 3 write-ups and any additional rule-breaking could result in dismissal from the program at any point in my stay."

Guest Name (print): _____

Guest Signature: _____ Date: _____

Case Manager Signature: _____

Without Case Plan Agreement

"The signature at the bottom of this document signifies that I, [Guest Name], on [Date], have decided and agree to NOT have a case plan with [Case Manager Name] for the duration of my stay at The Davies Shelter. I understand that my stay will be limited to 30 consecutive days from the date of my signature and that I must still adhere to and comply with all rules and guidelines of The Davies Shelters. I understand that 3 write-ups and any additional rule breaking could result in dismissal from the program before the end of my 30 days."

Guest Name (print): _____

Guest Signature: _____ Date: _____

Case Manager Signature: _____

SECTION 8: DISCHARGE & RE-ENTRY PROCEDURES

PLANNED EXIT PROCEDURES

When a guest successfully completes their stay:

- Case Manager coordinates discharge planning
- Guest updates mail forwarding addresses before departure
- Guest takes ALL belongings at time of discharge
- Staff completes discharge paperwork in EcoSystem App
- Mark guest status as "DISCHARGED" in EcoSystem

GUEST PROPERTY AT DISCHARGE

When you are discharged from the shelter, you must contact all the places you receive mail from and update your new contact information (address/phone).

- The shelter will not retain your mail.
- Additionally, you must take all belongings with you when you move out.

PROPERTY HOLD POLICY:

The shelter holds items for 24 hours after your departure. After 24 hours, any remaining items will be disposed of.

INVOLUNTARY DISCHARGE PROCEDURES

Guests may be discharged for the following reasons:

- Violation of shelter rules
- 3 write-ups plus any additional rule-breaking
- Violence, threats, or endangering other guests or staff
- Possession of prohibited items (drugs, drug paraphernalia, weapons)
- Refusal to comply with medication requirements for communicable diseases
- Other serious policy violations

In the event that an individual is discharged from the shelter:

- Case Manager or Night Manager documents reason for discharge in EcoSystem
- Guest is given verbal notice of discharge
- Guest must remove all belongings immediately
- If guest refuses to leave, police may be contacted
- Discharge is documented with eligibility status for re-entry

MAIL HANDLING

- Guest mail is delivered to the shelter and sorted by staff
- Staff should NOT open or read guest mail unless requested by the guest and they are present, or written consent is on file
- Mail should be distributed to guests promptly upon arrival
- Guests are responsible for notifying senders of address changes
- The shelter does not forward mail after a guest departs

MAIL FORWARDING AT DISCHARGE

When discharged from the shelter, guests must contact all places they receive mail from and update their new contact information (address/phone).

The shelter will NOT retain guest mail after discharge.

RE-ENTRY POLICY & PROCEDURES

When a former guest returns to the shelter for intake:

1. Night Manager or Case Manager creates new intake in EcoSystem
2. Toggle "Return Guest" option ON
3. Search for guest's previous record
4. EcoSystem displays guest's discharge details including ELIGIBILITY STATUS

5. If guest is ELIGIBLE: Proceed with normal intake

6. If guest is NOT ELIGIBLE: Form grays out and requires override

OVERRIDE PROCESS (for ineligible guests):

- Staff must select whether to OVERRIDE the ineligibility decision
- Staff must document REASON for override
- Once override is entered, intake can continue
- AUTO-EMAIL is sent to Executive Director and Operations Manager notifying them of the override

This ensures leadership has immediate visibility into exceptions.

SECTION 9: GUEST POLICIES

RESPECT STANDARDS

- Any disrespectful or flirtatious comments made toward staff, volunteers, or other shelter guests will not be tolerated
- All tobacco use is prohibited inside the shelter. Tobacco use is permitted only in designated areas
- Pornographic materials are prohibited in the shelter, which includes using your cell phone, tablet, laptop, or any other devices to access that type of material
- Illegally downloading material such as television, movies, and music is prohibited in the shelter
- Lights out occurs at 10pm. Guests may not get up except to visit the restroom. Guests will please turn off the volume on their cell phones and use headphones to watch videos or listen to music.
- Personal favors and loans from or between guests are strictly prohibited

SAFETY STANDARDS

- Violence, stealing, vandalism, dishonesty, disrespect, as well as provoking fights or arguments are not tolerated. Do not use profanity in the shelter.
- Use or possession of drugs (over the counter, prescription, or illegal), drug paraphernalia, pornography of any kind, weapons, or the shelter's property is subject to immediate dismissal. Including, but not limited to: Kratom, Delta-8, Synthetic Marijuana, etc.
- Weapons of any kind (including, but not limited to, bats, axes, hammers, knives, guns, etc.) are prohibited inside the shelter
- Guests' possessions will be searched upon arrival at the shelter and at any time during their stay at the shelter. All clothing must be laundered before being put away. All guest possessions must fit neatly in their locker or under their bed. Perishable food/drinks may not be kept in the guests' alcove, except water.
- All medications (over the counter or prescribed) will be kept in the office. Guests are required to take their medications as prescribed by their doctor.

- Locker/alcove checks, breathalyzers and drug screens will be administered, for cause, should there be any concern of substance misuse

SCHEDULE STANDARDS

- Monday-Friday: Guests leave the shelter by 8:00am and return between 5:00-6:00pm (curfew is strictly 6pm unless previously approved by staff)
- Saturday & Sunday: Guests leave the shelter by 9:00am and return between 2:00pm & 6:00pm (curfew is strictly 6pm unless previously approved by staff)
- The house is alarmed beginning at 10:00pm and is deactivated at 6:00am
- Exceptions to schedule will be made for employment (with a printed copy of your work schedule), recovery support meetings, and mental health support meetings only
- All guests are responsible for finding purposeful work Monday – Friday. Case manager will meet with you once a week regarding what you've accomplished and to help you work toward the achievement of your case plan goals

CLEANLINESS STANDARDS

- Perishable items (food and drinks), with the exception of water, are prohibited in alcoves and bedrooms.
- Possession of the shelter's property, besides what is provided to you, is prohibited. Chairs, tables, lamps, etc. will not be moved around the building. Additionally, bringing furniture into your alcove or bedroom is prohibited.
- Dirty/wet clothing, towels, or washcloths should be in your laundry basket or hanging from the hook on the side of your locker – not on the floor, hanging on the wall, or inside of your locker
- All guests must shower daily, wear clean clothing daily, wash hands before meals, remain appropriately dressed while in the shelter, and complete their assigned chores. Guests are expected to change their clothing while in the restrooms.

SECTION 10: FOOD POLICIES

MEAL SERVICE

All Davies Shelter Guests are provided a warm breakfast and dinner daily. Due to the number of guests at the shelters, staff cannot provide meals to everyone on their own schedule, and so meals are planned at designated times. Staff members are generally able to let guests know when to expect breakfast and dinner, and if there are questions or scheduling issues, we ask that you speak with a night manager or your case manager for solutions.

MEAL TIMES

- Breakfast service closes at 7:00 AM
- Dinner service closes at 6:30 PM

TO-GO LUNCHES

To go lunches can be provided if requested the evening before. This gives staff adequate time to prepare and package a meal.

KITCHEN ACCESS

Guests are only allowed in the kitchen and pantry areas while performing chores pertaining to these areas. Examples include washing dishes, organizing the refrigerator, organizing the pantry, etc. This isn't because we don't trust you – it's because food is often limited and having enough food for everyone is sometimes challenging. Limiting hands in the kitchen/pantry ensures we have enough food for everyone.

PERSONAL FOOD STORAGE - CUBBIES

Each guest is assigned a cubby for storage of personal food. Cubbies must be kept clean and organized, and food must be secured with lids, clips, or other appropriate closures. This helps to prevent pests while also allowing guests more freedom around the food they eat while staying at the shelter.

SECTION 11: SAFETY, SECURITY, AND EMERGENCY RESPONSE

OVERVIEW

Emergencies at the shelter include fire, utility failures, natural disasters, medical crises, and security threats. This section outlines response protocols for each type of emergency.

Staff must be familiar with all emergency procedures and know the locations of:

- Fire extinguishers: [LOCATION]
- First aid kits: [LOCATION]
- AED (Automated External Defibrillator): [LOCATION]
- Naloxone (Narcan): [LOCATION]
- Emergency exits
- Tornado shelter locations
- Assembly points

WHEN TO CALL 911

Call 911 immediately if:

- Someone is experiencing cardiac or breathing problems
- Someone is unresponsive or unconscious
- Someone is experiencing uncontrolled bleeding
- Someone is having a psychiatric crisis or is a harm to themselves or others
- There is a fire or smell of smoke
- There is any other life-threatening emergency

CRITICAL LANGUAGE FOR 911 PSYCHIATRIC EMERGENCIES:

When communicating with 911 about a guest who is a safety risk to themselves or others, the exact language to use is:

"they are a harm to themselves (or others)."

This specific language helps 911 dispatchers understand the severity and send appropriate response.

WHAT TO TELL 911 DISPATCHER

When calling 911, provide:

- Your name and role
- Shelter address: [Men's: 132 East 18th Street] [Women's: 2007 North Broad Street]
- Nature of emergency
- Condition of the person (if medical)
- Any immediate dangers
- Number of people involved
- Whether the person is conscious/breathing
- Follow dispatcher's instructions - **do NOT** hang up until told to do so

FIRE SAFETY SYSTEM

The Fire Safety System provides immediate notification to the Rome Fire Department. The system is maintained through [security monitoring company] and Rome Fire Department.

When the alarm is triggered:

- Shelter staff will receive a phone call from the monitoring company
- If that call is missed, emergency fire services will be dispatched to the house

- If it is not an emergency, a staff member must be able to explain to the monitoring company what triggered the alarm
- If staff cannot be reached during an imminent danger/emergency, or if unable to explain the alarm trigger, the shelter will be charged a fine
- If staff is unable to explain the alarm trigger due to neglect of duties, the staff member may be disciplined up to termination based on the severity of the issue

FIRE EVACUATION PROCEDURES

In the event of a fire:

1. Activate the fire alarm if not already activated
2. Immediately evacuate all guests and staff from the building
3. **DO NOT** stop to collect belongings
4. Use nearest safe exit
5. Assist guests with mobility challenges if safe to do so
6. Close doors behind you (*do not lock*)
7. Proceed to assembly point:

Men's Shelter: Parking lot

Women's Shelter: Playground

8. Take headcount using shelter roster
9. Report anyone missing or unaccounted for to fire department
10. **DO NOT** re-enter building until fire department gives all-clear

FIRE DRILLS

Fire drills are conducted regularly (frequency to be verified) and are required by the local fire authority (Rome Fire Department) annually.

All staff and guests must participate in fire drills.

Staff should:

- Take fire drills seriously and treat them as real emergencies

- Supervise guest evacuation
- Take headcount at assembly point
- Document drill completion and any issues
- Report any problems with evacuation procedures to Operations Manager

TORNADO AND SEVERE WEATHER PROCEDURES

When tornado warning is issued or severe weather threatens:

1. Monitor weather alerts on phone/radio/TV
2. Alert all guests and staff
3. Move to tornado shelter location:
 - Men's Shelter: Office (interior room with no windows)
 - Women's Shelter: Hallways and bathrooms without windows
4. Bring shelter roster for headcount
5. Stay away from windows and exterior walls
6. Crouch low and cover head/neck
7. Remain in shelter until all-clear is given by weather service or emergency management

Do NOT go to assembly points during tornado - these are for fire and other emergencies, not severe weather.

MEDICAL EMERGENCY RESPONSE

Step-by-step response for medical emergency:

1. Assess the situation - is it life-threatening?
 - a. If life-threatening, call 911 immediately
 - b. If not immediately life-threatening, notify Case Manager or Operations Manager
2. Stay with the person - do not leave them alone
3. If trained, provide first aid as appropriate
4. Keep person calm and comfortable

5. Do not move person unless they are in immediate danger
6. Gather person's medications if relevant to emergency
7. Document incident in EcoSystem Night Watch or incident report
8. Follow up with Case Manager or Operations Manager

SECTION 12: MEDICATION MANAGEMENT

OVERVIEW

Both prescribed and over the counter (OTC) medications for guests are stored in a secure, pre-designated area at each facility. Guests are required to turn in all medications upon intake. Staff will complete medication forms for each medication and store it appropriately.

STORAGE AND INTAKE PROCEDURES

- All medication requiring refrigeration will be stored in the staff refrigerator.
- Case managers will review and monitor guest medication needs and services at intake and throughout residence. All discrepancies or problems should be reported to the Case Manager and management immediately.
- If a guest is prescribed medication to treat a communicable disease and refuses to follow the prescribed procedures, the guest may be asked to leave the shelter.
- All medication must be labeled. Prescription medication must indicate the guest's name, name of medication, strength, dosage and frequency, date of order, refills, quantity and physician's name.
- All guests are required to take their medication as prescribed by their physician.

DISPENSING PROCEDURES (9-STEP PROCESS)

When a guest needs his/her medication, the following procedures will be used *in this specific order*:

1. The guest will ask staff for his/her medication.
2. Guests will have water to take medication or during a meal, as prescribed.
3. Guests will sign for each dosage taken in a medication log on their medication form.
4. Staff will promptly retrieve the medication container and hand the ENTIRE container to the guest.
5. **Under NO CIRCUMSTANCES** will staff take the medication from the container.
6. Guests will take the appropriate dose of prescribed medication from the container and return the container to staff.
7. Guest will take medication in full view of staff.
8. Staff will return it to the cabinet.
9. Staff will initial the medication log to verify that the medication was given to the guest and the guest consumed it.

CRITICAL: Staff **NEVER** handle the medication directly. The guest takes medication from their own container.

CONTROLLED SUBSTANCES PROTOCOL

All narcotics or controlled substances will be counted in the presence of TWO staff members and be maintained in a DOUBLE-LOCKED box.

This ensures accountability and prevents diversion of controlled medications.

DAYTIME MEDICATION PROTOCOL (Georgia Law Compliance)

It is illegal to carry prescription drugs in anything other than the original container in the State of Georgia.

Therefore, if a guest requires medication during the day:

1. A staff member labels a Ziploc bag with all the pertinent medication information
2. All the medication should be kept in the bag (the guest should transfer their own medication from bottle to bag)
3. The guest may then take the prescription bottle with the single needed dose with them during the day
4. Staff should also take a picture of the medication details on the bottle using the respective shelter office phone
5. This photo is backup to ensure details of the prescription should something happen to the Ziploc bag

MEDICATION DISPENSING TIMES

- Medication will be dispensed twice a day at 7:30am and 7:30pm, UNLESS the prescription otherwise indicates on the bottle.
- If a guest requires medication at different times due to prescription requirements, accommodate those specific times as indicated on the prescription label.

DISPOSAL OF MEDICATION

In the week following a guest's exit from the shelter, staff will place any medication left at the shelter into a plastic bag marked with the guest's name and exit date. This bag will be stored for ONE WEEK.

At the end of that week, the medication bag will be properly disposed of at Walgreens or Floyd County Jail in the secure medication disposal box.

RE-OBTAINING MEDICATION AFTER DISCHARGE

A former guest may contact the shelter and request their medications to be returned to them. In order to secure their medication, arrangements should be made with a staff member.

A guest would need to present personal identification when picking up medication.

SECTION 13: MAIL PROCEDURES

SECTION 14: PHONE PROCEDURES

ANSWERING THE PHONES

When answering shelter phones:

Answer professionally: "The Davies Shelters, this is [Your Name], how may I help you?"

Take accurate messages including:

- Caller's name
- Phone number
- Date and time of call
- Message content
- Who the message is for
- Deliver messages promptly to appropriate staff member or guest
- **Do not give out personal information about guests, staff, or shelter operations without authorization**
- Refer media inquiries to or Executive Director or Administrator
- Refer donor inquiries to Administrator

GUEST PHONE CALLS

- Guests may receive calls during appropriate hours
- Staff should take messages if guest is unavailable
- Respect guest privacy - do not discuss guest's presence or information with callers unless authorized

EMERGENCY CALLS

- If a call concerns an emergency, prioritize immediately
- Get caller's contact information

- Notify appropriate staff or emergency services
- Document the call and response

SECTION 15: TRANSPORTATION

BICYCLES

Bicycles are provided for guests and remain the property of The Davies Shelters.

- Guests may use shelter bicycles for transportation to work, appointments, and approved activities
- Bicycles must be returned to shelter at end of use
- Guests are responsible for securing bicycles with provided locks
- Report any bicycle maintenance needs to staff
- Lost or stolen bicycles should be reported immediately
- Bicycles are not personal property and cannot be taken when guest leaves shelter

STAFF PERSONAL VEHICLE USE

Staff may transport guests in personal vehicles only when:

- Authorized by supervisor
- For official shelter business (appointments, emergencies, etc.)
- Following all traffic laws and safety procedures
- With appropriate insurance coverage

Staff should NOT:

- Transport guests for personal reasons
- Accept payment or gifts for transportation
- Transport guests alone when possible (have another staff member or guest present)

This maintains professional boundaries.

SECTION 16: TELEVISION AND VIDEO USAGE

TELEVISION

- Television is a privilege and may be restricted as part of disciplinary action
- Programming should be appropriate for all guests present
- Volume should be kept at reasonable levels
- No channels or content that violate shelter policies (pornography, violence, etc.)
- Disputes over programming should be resolved respectfully or staff will determine programming
- Television hours align with shelter schedule and lights out policy (10pm)

RECREATIONAL VIDEO

- Guests may use personal devices for video content
- Must use headphones after lights out (10pm)
- Content must comply with shelter policies (no pornography, no illegal content)
- Respect other guests' need for quiet, especially during sleeping hours

SECTION 17: FACILITY MAINTENANCE

FACILITY MAINTENANCE RESPONSIBILITIES

The facilities, maintenance, repair, fire safety and sanitation of the shelter are maintained to provide a safe and healthy environment.

Regular inspections are conducted by:

- Shelter staff (daily/weekly)
- Local fire authority (Rome Fire Department) annually
- Health authorities when required

WORK REQUESTS

For non-emergency maintenance needs:

- Submit work request to Operations Manager
- Include detailed description of issue
- Note location and any safety concerns
- Follow up if issue is not resolved in reasonable timeframe

EMERGENCY MAINTENANCE

For emergency maintenance issues:

- Address immediate safety concerns first
- Contact Operations Manager or on-call staff immediately
- Document issue thoroughly
- Make temporary accommodations for guest safety/comfort if needed

Examples of emergency maintenance:

- Plumbing failures causing flooding
- HVAC failure in extreme weather
- Electrical hazards
- Structural damage
- Security system failures

FACILITY KEYS

- Staff are issued keys as needed for their role
- Keys must NOT be duplicated
- Lost keys must be reported immediately to Operations Manager
- Keys must be returned upon separation from employment
- Unauthorized key duplication may result in termination

REGULAR MAINTENANCE CHECKS

Staff should regularly monitor and report:

- Fire extinguisher locations and inspection dates
- Emergency lighting functionality
- Alarm system functionality
- Exit signs illuminated
- Evacuation routes clear of obstacles
- First aid kit stocked
- Naloxone (Narcan) unexpired and accessible
- AED functional and accessible
- Plumbing functioning properly
- HVAC system operating
- Exterior security lighting
- Door locks and security systems

SECTION 18: ADDITIONAL OPERATIONAL TOPICS

AA/NA MEETINGS

Guests are encouraged to attend Alcoholics Anonymous (AA) and Narcotics Anonymous (NA) meetings as part of their recovery and case plan.

- Meeting attendance may be required as part of Phase System
- Transportation to meetings may be arranged
- Meeting attendance is documented in case notes
- Guests may request schedule exceptions for recovery meetings
- Staff should maintain list of local AA/NA meeting times and locations

RESPONDING TO DIFFICULT BEHAVIORS

When guests exhibit difficult behaviors:

- Remain calm and professional
- De-escalate when possible using calm voice and non-threatening body language

- Set clear boundaries and expectations
- Document behavior and response
- If behavior escalates to violence or threats, follow emergency procedures and call 911 if necessary
- Notify Case Manager of behavioral issues
- Case Manager determines if behavior warrants formal infraction
- Only Case Managers have authority to issue formal write-ups

REASONABLE SUSPICION OF ALCOHOL/ILLICIT DRUG USE

If staff have reasonable suspicion of alcohol or drug use:

- Document specific observations (behavior, appearance, odor, etc.)
- Notify Case Manager or supervisor immediately
- Locker/alcove checks, breathalyzers and drug screens will be administered FOR CAUSE should there be any concern of substance misuse
- Case Manager makes determination on testing and consequences
- Use or possession of drugs, alcohol, or drug paraphernalia is subject to immediate dismissal

OVERNIGHT STAY REQUESTS

Guests in Phase 3, Month 5 may request pre-planned and approved overnight stays for events.

- Case Manager must authorize overnight stays for shelter guests
- Guests who do not have overnight approval will be assumed to not need shelter services if they do not return
- Overnight requests must be submitted in advance

- Case Manager evaluates request based on guest's phase, progress, and reason for overnight stay

VOLUNTEER OPPORTUNITIES

The shelter welcomes volunteers to support operations and guest services.

- Volunteers must complete orientation and background check
- Volunteers work under staff supervision
- Volunteers follow all shelter policies including Privacy and Ethics policies
 - Volunteer opportunities may include:
 - Meal preparation and service
 - Facility maintenance projects
 - Guest services support
 - Administrative support
 - Special events and activities
 - Contact Communications & Outreach Manager for volunteer coordination

FOOD DONATIONS AND IN-KIND DONATIONS

The shelter accepts food and in-kind donations to support guest services.

Food Donations:

- Must be non-perishable or freshly prepared (not previously opened/used)
- Staff document all donations received during shift
- Food is stored appropriately and used to supplement meal service

- Donors may receive acknowledgment letter for tax purposes (coordinate with Director of Development)

In-Kind Donations:

- Clothing, toiletries, household items, and other goods may be accepted
- Items must be clean and in good condition
- Staff assess appropriateness of donations
- Inappropriate donations may be declined
- Document all donations for reporting purposes
- Coordinate with Director of Development for donor acknowledgment

SECTION 19: ECOSYSTEM APP - COMPLETE GUIDE

NOTE: Guest Intake procedures were covered in Section 5. This section covers all other EcoSystem App functions.

ECOSYSTEM APP STRUCTURE

When you open the app, you will see the shelter calendar.

This page will populate:

- Case meetings that you've scheduled
- As the app grows: scheduled workers, staff meetings, volunteer events

NAVIGATION

The navigation pane on the left-hand side displays all areas you have access to:

- Guests
- Case Meetings
- Budgets
- Resources
- Night Watch
- Reports

VIEWS VS. FORMS

Views: Display list of records with basic information

- Active views: Main views for current records
- Inactive views: Historical records, discharged guests

Forms: Detailed information input and editing

- Click "New" to create

- Click record name to open existing form

HELP PANE

Click question mark icon (top right) for:

- Field explanations
- Formatting requirements
- Process guidance

DATA ACCURACY IMPORTANCE

The information entered in EcoSystem is used for:

- Guest services coordination
- Grant reporting and compliance
- Funding applications
- Resource allocation
- Performance metrics

Accurate, complete data = More funding = Better services for guests

SECURITY LEVELS AND DATA ACCESS

Different security levels have access to different data:

Case Managers, Operations Managers, Admin/Executive Staff can:

- View guest SSN (reveal button)
- Access all guest records
- Create/edit case meetings
- View all Night Watch records
- Generate reports

Night Managers can:

- Create guest intake
- View assigned guests

- Create Night Watch records
- Dispense medications (log in EcoSystem)
- Limited access to historical data

CASE MEETING PROCEDURES

Creating Case Meeting Records:

Step 1: Navigate to Case Meetings in left navigation pane

Step 2: Click "New" on ribbon

Step 3: Complete required fields:

- Guest (lookup field - select from dropdown)
- Case Manager (usually auto-populates with your name)
- Meeting Date
- Meeting Type (Initial, Follow-up, Phase Review, etc.)

Step 4: Document meeting content:

- Guest Wins (accomplishments since last meeting)
- Challenges discussed
- Goals set
- Resources provided or coordinated
- Action items
- Phase advancement discussion (if applicable)

Step 5: Save record

Step 6: Schedule next meeting on calendar

TRACKING GUEST WINS

"Guest Wins" are important for:

- Celebrating progress
- Grant reporting
- Building guest confidence
- Demonstrating program effectiveness

Document ALL wins, even small ones:

- Obtained ID
- Attended meeting
- Completed chore without reminder
- Made progress on goal
- Practiced new skill

RESOURCE ASSIGNMENT PROCEDURES

When connecting guest with resources:

Step 1: Navigate to Resources

Step 2: Create link between guest and resource

Step 3: Document:

- Resource type
- Agency/provider
- Contact information
- Referral date
- Follow-up requirements
- Outcome

Step 4: Track in case notes

REPORTING FUNCTIONS

EcoSystem includes reporting capabilities for:

- Guest demographics
- Length of stay statistics
- Case meeting frequency
- Resource utilization
- Discharge outcomes
- Phase advancement rates

Reports are used for:

- Grant applications and reporting
- Board presentations
- Program evaluation
- Funding justification

SECTION 20: NIGHT WATCH (DAILY LOG) PROCEDURES

OVERVIEW

Night Watch in EcoSystem replaces the traditional paper Daily Log system. Evening, Overnight, and Weekend Managers use Night Watch to document all significant events during their shift.

DAILY LOG REVIEW REQUIREMENT

CRITICAL: Staff should review the Daily Log from the last 2 days worked to the beginning of the current shift. Staff initial to verify review.

This ensures continuity and awareness of recent events.

CREATING NIGHT WATCH RECORDS

1. Navigate to Night Watch in left navigation pane
2. Click "New" on ribbon
3. Select Event Type
4. Complete required fields based on event type
5. Save record

EVENT TYPES IN ECOSYSTEM NIGHT WATCH

1. DAILY LOG

- General shift notes and observations
- Fields: Date, shift time, staff member, general notes

2. PHONE CALLS

- Incoming or outgoing calls
- Fields: Caller, recipient, time, purpose, outcome

3. VISITOR

- Anyone visiting the shelter

- Fields: Visitor name, time in/out, purpose, who they visited

4. GUEST INTERACTION

- Significant interactions with guests
- Fields: Guest name, interaction type, notes, outcome

5. MEALS

- Meal service documentation
- Fields: Meal type (breakfast/dinner), time served, number of guests, special accommodations, to-go lunches prepared

6. DONATIONS

- Any donations received during shift
- Fields: Donor name, donation type (food/clothing/money/other), description, value (if known)

7. MEDLOG

- Medication administration
- Fields: Guest name, medication name, time administered, staff signature

8. FOOD/ITEM REQUESTS

- Guest requests for food or items
- Fields: Guest name, item requested, approved/denied, notes

9. SAFETY/EMERGENCIES

- Any safety concerns or emergency incidents
- Fields: Incident type, time, guests involved, action taken, outcome

10. INTAKES/DISCHARGES

- Guest arrivals and departures
- Fields: Guest name, type (intake/discharge), time, notes

11. STAFF TO ADMIN

- Notes or questions for administrative staff/management
- Fields: Topic, priority, action needed, who should address

REFERENCE SUBGRID USAGE

Many Night Watch records link to guest records through reference subgrids.

When documenting guest-specific events:

- Use lookup field to select guest name
- Event will appear in guest's record under related Night Watch subgrid
- Allows full history view of guest interactions

SHIFT REPORTS

In addition to specific Night Watch event records, staff should complete an overall Shift Report that includes:

- Record of the shift events
- Supervision given for guest chores (check-off list completion)
- Any donations made during shifts
- Issues requiring follow-up
- Notes for incoming shift

Shift Reports should be reviewed with arriving staff during change of shift to ensure smooth transition.

BEST PRACTICES FOR NIGHT WATCH DOCUMENTATION

- Document events as they happen (don't wait until end of shift)
- Be specific and objective in notes
- Use guest names (proper identification)
- Note times when relevant
- Document both positive and concerning events
- Flag items needing follow-up
- Initial/sign records as appropriate
- Review previous entries at start of shift

SECTION 21: PRIVACY & CONFIDENTIALITY

PURPOSE

Protect the privacy of guests, their children, and our staff by setting rules for how information is accessed, used, stored, shared, and protected.

SCOPE

Applies to all employees, fellows, interns, contractors, and volunteers across all programs.

HIGHLIGHTS

- **No outside sharing** without written permission, except as required by law or to prevent serious and imminent harm.
- **Internal sharing is 'need to know'** and minimum necessary.
- Children: **share information only with contacts listed on the guest profile**, verify identity first.
- No photos or videos of guests or children. No social media posts about guests or staff.
- IDs, mail, and medications must be handled in secure and private ways.
- **Mandatory reporting for suspected child abuse or neglect is required in Georgia**: report immediately and no later than 24 hours.

GENERAL PRIVACY PRINCIPLES

NO OUTSIDE SHARING WITHOUT PERMISSION

Do not share guest information outside The Davies Shelters without written permission from the guest, except:

- When required by law (court orders, subpoenas, mandatory reporting)
- To prevent serious and imminent harm to guests or others

INTERNAL SHARING: NEED TO KNOW AND MINIMUM NECESSARY

When sharing information internally:

- Share only with staff who need the information to do their job
- Share only the minimum information necessary
- Do not discuss guest information in public areas or where others can overhear
- Do not access guest records unless required for your job duties

CHILDREN'S PRIVACY PROTECTIONS

When working with women and children in the Women's Shelter:

- Share child information **ONLY** with authorized contacts listed on the guest profile
- **VERIFY IDENTITY** before sharing any child-related information
- **NEVER** disclose school locations or schedules
- Do not share information about children with anyone not listed as authorized contact, including other family members, unless authorized by mother
- Children remain in mother's care **at ALL TIMES**

PHOTOS AND VIDEOS

PROHIBITED:

- No photos or videos of guests
- No photos or videos of children
- No social media posts about guests or staff that identify individuals
- No sharing of guest images without written consent

FORMER GUESTS:

- Former guests may be featured in photos/videos ONLY with written consent and leadership approval

ID DOCUMENTS AND MAIL

ID Documents:

- Secure ID copies in locked cabinets or approved encrypted systems
- Do not leave ID copies accessible
- Shred ID copies when no longer needed
- Follow document retention policies

Mail:

- Do NOT open or read guest mail unless requested by the guest and they are present, or consent is on file
- Respect guest privacy regarding their correspondence
- Do not disclose who receives mail at the shelter

MEDICATION PRIVACY

- Store medication in locked cabinets
- Keep medication details private
- Discuss medication only as needed for safety and compliance
- Do not disclose guest medications to unauthorized persons

- Follow all procedures in Section 11: Medication Management

HEALTH AND COUNSELING INFORMATION

Treat any knowledge that a guest is receiving care as CONFIDENTIAL:

- Do not disclose that guest is receiving counseling services
- Do not discuss guest's health conditions
- Do not share information about medical appointments
- Case Managers may coordinate care but maintain confidentiality

SOCIAL SECURITY NUMBERS (SSN)

- SSNs are highly sensitive and protected
- Only Case Managers, Operations Managers, and Admin/Executive Staff can view SSN in EcoSystem (reveal button)
- Do not write SSN on documents that will be widely shared
- Do not include SSN in emails
- Verbal SSN sharing should be minimal and only when absolutely necessary

MANDATORY REPORTING

Georgia law requires immediate reporting of suspected child abuse or neglect.

WHEN TO REPORT:

- Suspected physical abuse of a child
- Suspected sexual abuse of a child
- Suspected neglect of a child
- Child in danger of harm

HOW TO REPORT:

1. Call Georgia Division of Family and Children Services (DFCS) immediately [706-295-6500](tel:706-295-6500)
2. Report no later than 24 hours after suspicion arises
3. If child is in immediate danger, call 911 FIRST
4. Then notify your supervisor or Privacy Officer
5. Document your report and any observations

REPORTER INFORMATION:

- You will need to provide your name and contact information
- Reports are taken seriously and investigated
- Reporters are protected by law from retaliation
- Good faith reports are legally protected even if investigation finds no abuse

NEVER DELAY mandatory reporting to consult with supervisor first. Make the report, then notify leadership.

CRIMINAL HISTORY

- Do not disclose guest's criminal history without a safety need and supervisor approval
- Criminal background should not be discussed casually
- Information may be relevant for case management but should be handled sensitively
- Guests should not be judged or discriminated against based on history of incarceration

DISCRETION IN PUBLIC

- Do not discuss shelter matters in public places (restaurants, stores, community events, etc.)
- Do not identify yourself as Davies Shelters staff when discussing sensitive topics in public

- Use discretion when in uniform or wearing shelter branded items
- Protect guest privacy at all times, including outside work hours

PRIVACY OFFICERS

Guest/Staff

Privacy Officer: [EXECUTIVE DIRECTOR] (Admin)

Email: [\[EXECUTIVE DIRECTOR EMAIL\]](#)

App/Documents

Privacy Officer: [DEVELOPMENT ADMINISTRATOR] (Admin)

Email: [\[ADMIN EMAIL\]](#)

The Privacy Officer is responsible for:

- Ensuring privacy policy compliance
- Investigating privacy violations
- Providing privacy training
- Updating privacy procedures
- Serving as privacy resource for staff

EXECUTIVE DIRECTOR OR DESIGNEE

Executive Director: [EXECUTIVE DIRECTOR]

Contact Executive Director for:

- Privacy concerns involving Privacy Officer
- Serious privacy violations
- Policy questions
- Mandatory reporting notification (after making initial report)

REPORTING PRIVACY CONCERNS

If you become aware of a privacy violation or concern:

1. Report the same day to your supervisor or the Privacy Officer
2. If the concern involves your supervisor, report to Executive Director or Privacy Officer
3. Document what you observed
4. Do not investigate on your own - let leadership handle

CONSEQUENCES OF PRIVACY VIOLATIONS

Privacy violations may result in:

- Retraining
- Written warning
- Suspension
- Termination
- Legal consequences (in cases of intentional violations)

The severity of consequences depends on:

- Whether violation was intentional or accidental
- Severity of harm caused
- Guest's wishes regarding resolution
- Repeated violations

PROTECTION FROM RETALIATION

Retaliation for good faith reporting of privacy violations is PROHIBITED.

If you experience retaliation for reporting a privacy concern, report immediately to Privacy Officer or Executive Director.

SECTION 22: ETHICS & PROFESSIONAL BOUNDARIES

CORE PRINCIPLE

Every person has sacred worth and is treated with respect, honesty, and open-mindedness.

NON-DISCRIMINATION POLICY

The Davies Shelters does NOT tolerate discrimination or harassment based on:

- Race
- Color
- Religion
- National origin
- Age
- Sex
- Pregnancy
- Sexual orientation
- Gender identity or expression
- Transgender or nonbinary status
- Disability
- Service animal use
- Veteran status
- Marital or family status
- History of incarceration

GENDER IDENTITY AND EXPRESSION

- We shelter individuals based on presenting gender
- Staff use the guest's stated name and pronouns
- Respect presenting gender at intake, bed assignments, and all services
- LGBTQIA+ guests are welcome
- Harassment or jokes about sexual orientation or gender identity are PROHIBITED

PROFESSIONAL BOUNDARIES - FINANCIAL

NO TIPS, NO CASH, NO LOANS

Staff may NOT accept:

- Money from guests, former guests, or family members
- Valuables from guests, former guests, or family members
- Services from guests, former guests, or family members
- This includes tips, cash gifts, loans, or any exchange of money.

GIFTS FROM GUESTS

Gifts from guests are DISCOURAGED.

Only small non-cash items may be accepted (examples: homemade card, small craft item, baked goods for the office to share).

If a gift is accepted:

- Must be reported to supervisor THE SAME DAY
- Must be non-cash
- Must be small/token value
- Should be shared with team when appropriate (food items)

DO NOT accept:

- Cash or gift cards
- Expensive items
- Personal items of significant value
- Anything that creates sense of obligation

GIVING TO GUESTS

Staff may NOT give personal money or personal gifts to guests.

If a guest has a need:

- Use approved assistance processes
- Coordinate with Case Manager
- Access shelter resources or community resources

- Document assistance provided through proper channels
- Do not create personal charity relationships with individual guests.

NO BUYING OR SELLING WITH GUESTS

Prohibited:

- No private business deals with guests
- No barter arrangements
- No purchasing items from guests
- No selling items to guests
- No multi-level marketing recruitment of guests

PROFESSIONAL BOUNDARIES - RELATIONSHIPS

NO ROMANTIC OR SEXUAL RELATIONSHIPS WITH CURRENT GUESTS

This is an ABSOLUTE prohibition.

Romantic or sexual relationships with current guests are:

- Prohibited under all circumstances
- Grounds for immediate termination
- Unethical due to power imbalance
- Harmful to guests and shelter community

RELATIONSHIPS WITH FORMER GUESTS

Relationships with former guests require:

- Services must have ended
- Disclosure to supervisor
- Approval from Executive Director
- Assessment of appropriateness
- Ongoing monitoring

Even after services end, relationships may be inappropriate due to:

- Power dynamics

- Potential for exploitation
- Impact on shelter reputation
- Guest vulnerability

PROFESSIONAL BOUNDARIES - COMMUNICATIONS

KEEP COMMUNICATIONS PROFESSIONAL

- Use shelter-approved communication channels whenever possible
- Do not give personal cell phone number to guests unless required for job duties and approved by supervisor
- Do not communicate with guests through personal email
- Do not text guests from personal phone except for approved job-related purposes
- Keep all communications professional in tone and content

SOCIAL MEDIA WITH CURRENT GUESTS

DO NOT friend, follow, or direct message current guests on personal social media.

This includes:

- Facebook
- Instagram
- Twitter/X
- TikTok
- Snapchat
- LinkedIn
- Any other social platform

PROFESSIONAL BOUNDARIES - PHYSICAL INTERACTIONS

APPROPRIATE PHYSICAL BOUNDARIES

- Do not meet guests in personal homes (yours or theirs)
- Do not meet guests in personal vehicles except as required for approved transportation
- Follow transportation procedures for any guest transport
- Maintain appropriate physical space
- Avoid physical contact except professional handshakes or brief, appropriate gestures of support (side hug, pat on shoulder) when clearly welcome
- Never engage in physical contact of romantic or sexual nature
- Be aware of cultural differences regarding physical space and contact

VERBAL BOUNDARIES

Maintain professional verbal boundaries:

- Avoid overly personal conversations about your own life
- Do not share details of your personal problems with guests
- Keep focus on guest's needs and case plan
- Avoid favoritism in how you speak to or about guests
- Never use romantic or flirtatious language

AVOIDING FAVORITISM, RETALIATION, INTIMIDATION, HARASSMENT

Favoritism:

- Treat all guests equitably
- Do not give special privileges to some guests
- Make decisions based on rules and case plans, not personal preferences
- Be aware of unconscious bias

Retaliation:

- Never retaliate against guest for filing complaint
- Never punish guest for exercising their rights

- Report retaliation by others

Intimidation:

- Never use your position of authority to intimidate guests
- Do not threaten guests with consequences to manipulate behavior
- Use appropriate behavior management techniques

Harassment:

- Never harass guests verbally, physically, or psychologically
- Harassment includes unwelcome comments, jokes, touching, or other behavior
- Sexual harassment is absolutely prohibited
- Report harassment by others immediately

INTERACTIONS INSIDE AND OUTSIDE THE SHELTER

GENDER IDENTITY AND PRESENTATION

- Respect presenting gender at intake, bed assignments, and services
- Use the guest's stated name and pronouns
- Make adjustments if guest changes name or pronouns
- Correct yourself if you make mistake, then move on
- Do not ask invasive questions about gender identity or medical transition

LGBTQIA+ GUESTS

- LGBTQIA+ guests are welcome at The Davies Shelters
- Harassment or jokes about sexual orientation or gender identity are PROHIBITED
- This includes jokes made when guest is not present
- Create inclusive environment
- Do not make assumptions about relationships, family structure, or identity

DISABILITY ACCOMMODATIONS

- Make reasonable modifications for disability access
- Ask how to help - do not assume
- Work with guest to identify needed accommodations
- Coordinate with Case Manager and Operations Manager for implementation
- Document accommodations provided
- Follow ADA requirements

SERVICE ANIMALS

About Service Animals

Service animals are:

- Dogs
- Any breed and any size of dog
- Trained to perform a task directly related to a person's disability

Service animals are not:

- Required to be certified or go through a professional training program
- Required to wear a vest or other ID that indicates they're a service dog
- Emotional support or comfort dogs, because providing emotional support or comfort is not a task related to a person's disability

If the dog's mere presence provides comfort, it is not a service animal under the ADA. But if the dog is trained to perform a task related to a person's disability, it is a service animal under the ADA. For example, if the dog has been trained to sense that an anxiety attack is about to happen and take a specific action to help avoid the attack or lessen the impact, the dog is a service animal

Service animals are specifically allowed in Emergency Shelters according to law and shelter rules

- **Do NOT** separate service animal and handler
- Service animals are working animals - **do not** pet or distract them

Asking If a Dog is a Service Animal

You May **Only** Ask the 2 following Questions about a Guest's service animal:

1. Is this a service animal required because of a disability?
2. What work or task has the animal been trained to perform?

You May **NOT**:

- Ask about the person's disability
- Require documentation for a service animal
- Require that the dog demonstrate its task, or inquire about the nature of the person's disability

When a Service Animal Can Be Kept Out

A business or state/local government does not need to allow a service animal if the dog's presence would "***fundamentally alter***" the nature of the goods, services, programs, or activities provided to the public

What does "***fundamentally alter***" mean?

In most settings, the presence of a service animal will not result in a fundamental alteration. However, there are some exceptions. For example, at a boarding school, service animals could be restricted from a specific area of a dormitory reserved specifically for students with allergies to dog dander.

The decision to not allow a service dog in the shelter rests **solely** with the Executive Director. Case Managers, Night Managers, and Operations Managers may not make the call to allow a service dog or not

WOMEN WITH CHILDREN

Women with children in the Women's Shelter receive added privacy protections.

- Children remain in mother's care at ALL TIMES
- Verify authorization before discussing child-related information
- **ONLY** share child information with contacts listed on guest profile

- Never disclose school locations or schedules

CRIMINAL HISTORY

- **Do not** disclose criminal history without a safety need and supervisor approval
- Guests should not be judged or discriminated against based on history of incarceration
- Focus on current behavior and case plan goals
- Criminal history may be relevant for certain case management decisions but should be handled sensitively
- **Do not** discuss guest's criminal history with other guests or in public

DISCRETION IN PUBLIC

- Do not discuss shelter matters in public places (restaurants, grocery stores, community events)
- Use discretion when wearing shelter-branded clothing or items
- Do not identify yourself as Davies Shelters staff when discussing sensitive topics in public settings
- Protect guest privacy and shelter reputation at all times
- This applies both during work hours and personal time

CONFLICTS OF INTEREST

A conflict of interest exists when your personal interests could influence your professional judgment or create appearance of impropriety.

Examples:

- Family member or close friend becomes a guest
- Financial relationship with vendor or partner agency
- Romantic interest in guest or former guest
- Business relationship with guest

- Dual role (staff member and board member at partner agency)

REQUIREMENT: Disclose potential conflicts to your supervisor immediately

Supervisor and leadership will:

- Assess the conflict
- Determine if it can be managed
- May reassign work to remove conflict
- May require recusal from certain decisions
- Document conflict and management plan

REPORTING ETHICS VIOLATIONS

If you observe or experience an ethics or boundaries violation:

1. Report concerns **THE SAME DAY** to your supervisor or the Privacy Officer ([EXECUTIVE DIRECTOR], [EXECUTIVE DIRECTOR EMAIL])
2. If the concern involves your supervisor, report to Executive Director/ Privacy Officer

Step 3: Document what you observed including:

- Date, time, location
- Who was involved
- What happened
- Any witnesses
- Any immediate action taken

Step 4: Cooperate with investigation

PROTECTION FROM RETALIATION

Retaliation for good faith reporting of ethics violations is PROHIBITED.

If you experience retaliation for reporting an ethics concern, report immediately to Privacy Officer/ Executive Director.

CONSEQUENCES OF ETHICS VIOLATIONS

Ethics violations may result in:

- Coaching and retraining
- Written warning
- Suspension without pay
- Termination
- Legal consequences (in serious cases)

The severity of consequences depends on:

- Nature and severity of violation
- Whether violation was intentional
- Harm caused to guest, shelter, or staff
- Pattern of violations
- Response of violator (accountability, remorse)

EXECUTIVE DIRECTOR CONTACT

Executive Director: [EXECUTIVE DIRECTOR]

Contact for:

- Ethics concerns involving Privacy Officer
- Serious ethics violations
- Policy questions
- Conflicts of interest requiring executive approval

SECTION 23: SOCIAL MEDIA & PUBLIC COMMUNICATIONS POLICY

CORE RULES

1. PRIVACY FIRST

Do NOT post, share, or hint at information that could identify a guest or child.

2. NO PHOTOS OF GUESTS OR CHILDREN

No photos of guests or their children on any channel, any platform, at any time.

3. FORMER GUESTS

Former guests may be featured ONLY with written consent and leadership approval.

4. NO SENSITIVE INFORMATION

Do not discuss medications, health, counseling, legal matters, housing status, or other sensitive information about guests or staff.

5. NO PERSONAL CONTACT WITH CURRENT GUESTS

Do not friend, follow, or message current guests from personal accounts.

6. NO PERSONAL FUNDRAISERS

Do not create personal fundraisers for individual guests. Use official shelter channels.

7. AUTHORIZATION REQUIRED FOR OFFICIAL POSTS

Do not speak on behalf of the shelter unless authorized. Official posts must follow brand voice and approval processes.

8. PERSONAL VIEWS DISCLAIMER

Personal views are your own. If your bio mentions employment, add a short disclaimer.

9. REPORT THREATS

Report threats, safety concerns, or privacy issues to leadership. Do not argue online.

DETAILED GUIDANCE

WHAT YOU CANNOT POST ABOUT GUESTS

Prohibited content includes:

- Names of guests or their children
- Photos of guests or children (current or former without consent)
- Physical descriptions that could identify someone
- Locations where guests are staying
- Circumstances that led to homelessness
- Medical conditions, medications, or treatments
- Mental health status or counseling
- Substance use history or recovery status
- Legal issues, court dates, probation status
- Family conflicts or relationships
- Employment status or job search
- Housing search details
- Personal struggles or challenges
- Any information that could identify a specific individual
- Even if you think information is vague enough, DO NOT POST IT.
- The risk of identification is not worth the potential harm to guests.

PHOTOS AND VIDEOS

CURRENT GUESTS:

- NEVER take photos or videos of current guests
- NEVER post photos or videos of current guests

- This applies to all platforms and all contexts

CHILDREN:

- NEVER take photos or videos of children at the shelter
- NEVER post photos or videos of children
- This is an absolute rule with no exceptions

FORMER GUESTS:

- Former guests may be featured ONLY with written consent
- Consent must be documented and approved by leadership
- Guest must understand how and where content will be used
- Guest can revoke consent at any time
- Even with consent, be thoughtful about what you share

SHELTER SPACES:

- Photos of empty shelter spaces (beds, common areas, kitchen) are must be approved by Communications & Outreach Manager
- Ensure no personal items or identifying information visible
- Consider security implications of showing shelter layout

PERSONAL SOCIAL MEDIA ACCOUNTS

CURRENT GUESTS:

- Do NOT friend, follow, or direct message current guests on personal social media
- This includes Facebook, Instagram, Twitter/X, TikTok, Snapchat, LinkedIn, etc.
- If a current guest sends friend/follow request, decline and explain professionally
- Wait until services have ended before connecting on social media

FORMER GUESTS:

- May connect with former guests on social media after services end
- Use professional judgment
- Consider whether relationship is appropriate

- Maintain boundaries even after services end
- Still bound by privacy rules - do not discuss their time at shelter

PROFESSIONAL BOUNDARIES ONLINE:

- Keep personal social media content appropriate
- Remember you represent the shelter even on personal accounts
- Avoid posts that could embarrass the shelter or conflict with mission
- Be aware that guests, donors, and community members may see your posts

EMPLOYMENT DISCLAIMER:

If your social media bio mentions Davies Shelters employment:

Add disclaimer such as:

- "Views are my own"
- "Personal account, not affiliated with employer"
- "Opinions expressed are mine alone"

This clarifies that personal posts do not represent the organization.

FUNDRAISERS FOR GUESTS

DO NOT create fundraisers for guests on:

- GoFundMe
- Facebook Fundraisers
- Other crowdfunding platforms

WHY:

- Creates boundary issues
- May violate privacy
- Undermines shelter's established processes
- Can create favoritism or inequity
- May not be in guest's best interest

INSTEAD:

- Connect guest with Case Manager

- Use shelter's established assistance programs
- Coordinate with community resources
- Follow proper procedures

OFFICIAL SHELTER SOCIAL MEDIA

AUTHORIZATION REQUIRED:

- Only authorized staff may post to official Davies Shelters accounts
- Administrator manages official accounts
- All official posts must follow brand voice and content guidelines
- Some posts may require advance approval from leadership

OFFICIAL ACCOUNTS INCLUDE:

- Facebook page
- Instagram account
- Twitter/X account
- Website blog
- Email newsletters
- Any other platform representing the organization

CONTENT GUIDELINES FOR OFFICIAL POSTS:

- Focus on mission, programs, impact
- Share volunteer opportunities
- Highlight community partnerships
- Celebrate milestones and successes
- Request donations and support
- Provide education about homelessness
- ALWAYS protect guest privacy
- Use approved photos only
- Follow brand style guide

DONOR AND VOLUNTEER PHOTOS:

- Photos of donors, volunteers, board members, staff generally okay with permission
- Get verbal or written permission before posting
- Tag appropriately and professionally
- Thank volunteers and donors publicly when appropriate

HANDLING NEGATIVE COMMENTS OR CRITICISM

If you see negative comments on official shelter social media:

- DO NOT engage in arguments
- DO NOT delete comments unless they violate platform rules (spam, hate speech, etc.)
- NOTIFY Communications & Outreach Manager or leadership
- Let designated staff handle response

If you encounter criticism in your personal social media:

- Stay professional
- Do not share confidential information to defend the shelter
- Refer person to official shelter channels
- Notify leadership if concern seems serious

THREATS AND SAFETY CONCERNS

If you see threats or safety concerns on social media:

- Take screenshot immediately
- Report to supervisor and/or Privacy Officer immediately
- If immediate danger, call 911
- Do not engage with threatening person
- Document everything

PRIVACY INCIDENTS ON SOCIAL MEDIA

If you discover that guest privacy has been violated on social media:

- Take screenshot
- Report to Privacy Officer (Executive Director, [EXECUTIVE DIRECTOR]) immediately
- Do not share or amplify the post
- Cooperate with response and investigation

CONSEQUENCES OF VIOLATIONS

Violations of social media policy may result in:

- Required deletion of posts
- Retraining
- Written warning
- Suspension
- Termination

Serious violations (posting guest photos, sharing confidential information, creating hostile environment) may result in immediate termination.

SECTION 24: GUEST ACCOUNTABILITY & INFRACTIONS

OVERVIEW

Guest accountability is managed through a progressive discipline system combining education, warnings, and consequences for policy violations.

CRITICAL: ONLY CASE MANAGERS HAVE AUTHORITY TO ISSUE FORMAL INFRACTIONS

AUTHORITY TO ISSUE FORMAL INFRACTIONS:

ONLY Case Managers can issue formal write-ups and enforce accountability measures including verbal warnings and written warnings for infractions.

Night Managers and other staff:

- Document concerning behavior in Night Watch/shift reports
- Report issues to Case Managers
- May address minor issues in the moment
- CANNOT issue formal write-ups

THREE WRITE-UPS POLICY

3 write-ups AND any additional rule-breaking could result in dismissal from the program at any point in the stay.

This applies to BOTH pathways:

- Guests WITH case plan (5-month program)
- Guests WITHOUT case plan (30-day program)

PROGRESSIVE DISCIPLINE PROCESS:

1. VERBAL WARNING:

- a. Case Manager addresses behavior with guest

- b. Explains rule or expectation that was violated
- c. Discusses consequences of continued violation
- d. Documents verbal warning in case notes
- e. May be appropriate for first-time minor violations

2. WRITTEN WARNING (WRITE-UP #1):

- a. Formal written documentation of violation
- b. Guest receives copy
- c. Case Manager discusses consequences
- d. Documented in guest file
- e. Guest signs acknowledgment

3. WRITTEN WARNING (WRITE-UP #2):

- a. Second formal written documentation
- b. More serious consequences discussed
- c. Guest informed they are at risk of dismissal
- d. Meeting with Case Manager required
- e. May involve Operations Manager or Executive Director

Step 4: WRITTEN WARNING (WRITE-UP #3)

- Third formal write-up
- Guest is now at risk of immediate dismissal
- Any additional rule-breaking may result in discharge
- Decision on whether to discharge may involve leadership

Step 5: DISMISSAL

- After 3 write-ups, any additional rule-breaking may result in dismissal
- May also occur immediately for serious violations

IMMEDIATE DISMISSAL VIOLATIONS

Some violations may result in IMMEDIATE DISMISSAL without progressive discipline:

- Violence, threats, or endangering others
- Stealing
- Use or possession of drugs (over the counter, prescription not prescribed to guest, or illegal)
- Possession of drug paraphernalia
- Possession of weapons of any kind
- Possession of pornography
- Vandalism
- Fighting or provoking fights
- Dishonesty that creates safety risk

Case Manager makes determination on immediate dismissal in consultation with Operations Manager or Executive Director.

TYPES OF VIOLATIONS

MINOR VIOLATIONS (typically verbal warning or first write-up):

- Missing curfew without approval
- Incomplete chores
- Disrespectful tone or comments
- Failure to follow schedule
- Minor cleanliness issues
- Failure to attend required meeting (without valid excuse)

MODERATE VIOLATIONS (typically write-up):

- Repeated minor violations
- Significant disrespect to staff or guests
- Failure to comply with medication requirements
- Unauthorized overnight absence
- Violation of food policies (kitchen access, cubby standards)

- Smoking in prohibited areas
- Loud or disruptive behavior after lights out
- Failure to follow staff directions

SERIOUS VIOLATIONS (may result in immediate dismissal):

- Violence or threats
- Possession of prohibited items (drugs, weapons, alcohol, pornography)
- Stealing
- Destruction of property
- Sexual harassment or misconduct
- Leaving children unsupervised (Women's Shelter)
- Bringing unauthorized persons into shelter
- Refusing drug/alcohol testing when required
- Behavior that endangers others

DOCUMENTING INFRACTIONS

Case Managers document all infractions including:

- Date and time of violation
- Description of what happened
- Which rule or policy was violated
- Witness statements if applicable
- Guest's response or explanation
- Disciplinary action taken (verbal warning, write-up number)
- Date and case manager signature
- Guest signature acknowledging receipt
- Guest refusal to sign does not invalidate the write-up.

Documentation should be:

- Factual and objective

- Specific about behavior observed
- Free from judgment or personal opinion
- Focused on the action, not the person

GUEST RIGHTS IN ACCOUNTABILITY PROCESS

Guests have the right to:

- Be informed of rules and expectations
- Receive explanation of violations
- Provide their perspective on what happened
- Receive consistent treatment (all guests subject to same rules)
- Appeal decisions to Operations Manager or Executive Director
- Be treated with dignity and respect throughout process

Guests do NOT have the right to:

- Remain at shelter after serious violations
- Avoid consequences for rule violations
- Special treatment or exceptions not available to all guests

APPEALS PROCESS

If guest believes write-up or dismissal was unfair:

1. Guest discusses concern with Case Manager
2. If not resolved, guest may request meeting with Operations Manager
3. Operations Manager reviews documentation and meets with guest and Case Manager
4. Operations Manager makes decision, which may include:
 - a. Upholding original decision
 - b. Modifying consequences
 - c. Removing write-up if error occurred

5. Executive Director may be involved in serious appeals
6. Decision is final

SECTION 25: INCIDENT REPORTING

OVERVIEW

An Incident Report is required for any critical incident occurring at the shelter that involves guests, staff, volunteers, or visitors.

PURPOSE OF INCIDENT REPORTING

Incident reports serve to:

- Document what occurred for legal protection
- Help review and improve staff performance
- Identify safety concerns or patterns
- Fulfill insurance and liability requirements
- Support investigations if needed
- Inform leadership of serious events
- Protect guests, staff, and organization

WHAT REQUIRES AN INCIDENT REPORT?

ALWAYS complete Incident Report for:

- Any injury requiring medical attention
- Any 911 call or ambulance transport
- Police response to shelter
- Guest-to-guest violence or serious conflict
- Staff injury while on duty
- Property damage or destruction
- Theft or suspected theft
- Guest going missing or leaving AMA (against medical advice) if concerning
- Guest death
- Fire, flood, or other facility emergency
- Suspected child abuse or neglect (also make mandatory report)

- Sexual misconduct or assault
- Serious policy violations resulting in dismissal
- Threats of violence against staff, guests, or property
- Medication errors
- Guest psychiatric crisis
- Any event that could result in liability claim
- Any event leadership should be immediately aware of

WHEN IN DOUBT: Complete an incident report. It's better to over-report than under-report.

INCIDENT REPORT REQUIREMENTS:

FORMAT:

- All incident reports MUST be typed (not handwritten)
- Use standard Incident Report Form template
- Complete all fields

TIMING:

- Report must be immediately submitted to Executive Director or designee
- Preliminary report may be brief if incident is ongoing
- Detailed report must be submitted within 24 hours of incident

CONTENT REQUIREMENTS:

- Date and time of incident
- Location of incident (Men's or Women's shelter, specific room if applicable)
- Names of all persons involved or witnesses (guests, staff, visitors)
- Detailed description of what happened
- Sequence of events in chronological order
- Actions taken in response
- Injuries sustained (describe specifically)

- Medical attention provided or refused
- Police or emergency services involvement
- Witness statements (include name and role of witness)
- Staff member completing report (name, role, signature, date)

WRITING THE INCIDENT REPORT

BE FACTUAL AND OBJECTIVE:

- Describe what you observed, saw, or heard directly
- Use quotes for statements: Guest said, "I didn't do it."
- Avoid assumptions, judgments, or opinions
- Stick to facts: "Guest's knuckles were bleeding" not "Guest was in a fight"
- Do not speculate about causes or motivations

BE SPECIFIC:

- Note exact times
- Describe injuries specifically: "2-inch laceration on left forearm requiring 4 stitches" not "hurt arm"
- Include specific statements made by involved parties
- Describe actions taken: "Applied pressure with clean cloth, called 911 at 6:45pm, stayed with guest until ambulance arrived at 6:52pm"

BE THOROUGH:

- Include all relevant details
- Document who was notified and when
- Note any property damage with description and estimated value
- Attach witness statements if collected separately
- Include any photographs taken (with guest permission if possible)

BE CLEAR:

- Write in plain language

- Use complete sentences
- Organize chronologically
- Break into paragraphs for readability
- Proofread before submitting

WITNESS STATEMENTS

If witnesses are present:

- Collect statements as soon as possible while memory is fresh
- Get statement in witness's own words
- Have witness write statement if possible, or staff can write while witness dictates
- Witness should sign and date statement
- Include witness contact information
- Attach to incident report

IMMEDIATE NOTIFICATION

For serious incidents, IMMEDIATELY notify (before completing written report):

- Operations Manager
- Executive Director
- On-call supervisor (if after hours)
- Examples of incidents requiring immediate phone notification:
- Any 911 call
- Violence
- Missing person
- Suspected child abuse
- Death
- Serious injury
- Police involvement

- Fire or facility emergency
- Anything that could result in media attention

INCIDENT REPORT STORAGE

Incident reports are stored in a secure SharePoint file.

Access is limited to:

- Executive Director
- Operations Manager
- Director of Development (for grant reporting if needed)
- Other leadership as appropriate

CONFIDENTIALITY

Incident reports are CONFIDENTIAL.

- Do not discuss incidents with other guests
- Do not share incident details with staff who don't need to know
- Protect privacy of all involved parties
- Follow HIPAA-like standards for medical information
- Do not post about incidents on social media

APPENDIX A: EMERGENCY CONTACTS

EMERGENCY SERVICES

Fire/Police/EMS: 911

Poison Control: 1-800-222-1222

LEADERSHIP

Executive Director/Privacy Officer: [EXECUTIVE DIRECTOR]

Phone: [PHONE]

Email: [EXECUTIVE DIRECTOR EMAIL]

Operations Manager: [OPERATIONS MANAGER]

Phone: [PHONE]

Email: [OPERATIONS MANAGER EMAIL]

Administrator: [DEVELOPMENT ADMINISTRATOR]

Email: [ADMIN EMAIL]

Board President: [BOARD PRESIDENT]

Email: [EMAIL]

ON-CALL/AFTER-HOURS NUMBERS

After-Hours Emergency Contact: Operations Manager>Executive Director

FACILITIES

Men's Shelter Address: [Address Redacted]

Women's Shelter Address: [Address Redacted]

UTILITIES AND SERVICES:

Gas Company Emergency: 877.427.4321

Georgia Power

Emergency: 1 (888) 891-0938

Report an Outtage: 1-888-891-0938

Outtage Map: <https://outagemap.georgiapower.com/>

Water/Sewer Emergency: [CONTACT INFO]

Security System: [CONTACT INFO]

COMMUNITY RESOURCES

Rome Fire Department (non-emergency): (706) 236-4500

Rome Police Department (non-emergency): (706) 238-5111

DFCS Child Abuse Hotline: 1-855-GACHILD (1-855-422-4453)

Crisis Hotline: 988 (Suicide & Crisis Lifeline)

Domestic Violence Hotline: 1-800-799-7233

More Community Resources:

www.daviesshelter.com/resources

MEDICAL:

Atrium Health: [CONTACT INFO]

Urgent Care: [CONTACT INFO]

Mental Health Crisis: [CONTACT INFO]

APPENDIX B: REQUIRED FORMS

The following forms are used in shelter operations:

INTAKE FORMS

- Guest Intake Form (EcoSystem)
- Phase System Agreement - WITH Case Plan
- Phase System Agreement - WITHOUT Case Plan (30-day)
- Privacy Policy Acknowledgment
- Shelter Rules Acknowledgment
- Children Policy Acknowledgment (Women's Shelter)

CASE MANAGEMENT FORMS

- Case Meeting Notes (EcoSystem)

- Budget Worksheet
- Goal Setting Form
- Resource Referral Form
- Phase Advancement Letter/Oral Defense Documentation

MEDICATION FORMS

- Medication Form (for each medication)
- Medication Log (sign-in sheet for doses)
- Controlled Substance Count Log
- Medication Disposal Log

OPERATIONAL FORMS

- Shift Report
- Night Watch Event Records (EcoSystem - multiple types)
- Incident Report Form
- Work Request Form
- Donation Receipt Form
- Visitor Log

ACCOUNTABILITY FORMS

- Verbal Warning Documentation
- Written Warning (Write-Up) Form
- Discharge Documentation
- Re-Entry Override Documentation (in EcoSystem)

APPENDIX C: FACILITY INFORMATION

MEN'S SHELTER

Address: [Address Redacted]

Capacity: [CAPACITY]

Phone: [shelter phone redacted]

EMERGENCY INFORMATION

Tornado Shelter Location: Office

Emergency Assembly Point: Parking lot

EMERGENCY EQUIPMENT LOCATIONS

AED Location: [LOCATION]

First Aid Kit: [LOCATION]

Naloxone (Narcan): [LOCATION]

Fire Extinguishers: [LOCATION]

WOMEN'S SHELTER

Address: [Address Redacted]

Capacity: [CAPACITY]

Phone: [shelter phone redacted]

EMERGENCY INFORMATION

Tornado Shelter Location: Library Walk-In Closet

Emergency Assembly Point: Playground

EMERGENCY EQUIPMENT LOCATIONS

AED Location: [LOCATION]

First Aid Kit: [LOCATION]

Naloxone (Narcan): [LOCATION]

Fire Extinguishers: [LOCATION]

APPENDIX D: QUICK REFERENCE GUIDES

DAILY SCHEDULE (STANDARD)

Monday-Friday:

- 6:00 AM - Alarm deactivated, wake up
- 7:00 AM - Breakfast service closes
- 7:30 AM - Morning medications
- 8:00 AM - Guests must leave shelter (unless exception approved)
- 5:00-6:00 PM - Guest check-in window
- 6:00 PM - Curfew (Phase 1) / Exceptions for other phases
- 6:30 PM - Dinner service closes
- 7:30 PM - Evening medications
- 10:00 PM - Lights out, alarm armed

Saturday-Sunday:

- 6:00 AM - Alarm deactivated
- 7:00 AM - Breakfast service closes
- 7:30 AM - Morning medications
- 9:00 AM - Guests must leave shelter
- 2:00-6:00 PM - Guest check-in window
- 6:00 PM - Curfew
- 6:30 PM - Dinner service closes
- 7:30 PM - Evening medications
- 10:00 PM - Lights out, alarm armed

PHASE SYSTEM QUICK REFERENCE

Phase 1

- 4 case meetings in 4 weeks
- 6pm curfew (out 8am-6pm)

- Random drug/alcohol tests
- Purposeful work
- Budget creation and adherence

Phase 2

- 6 case meetings in 8 weeks
- Access to counseling
- Professional haircut
- 10pm curfew extension once/week (pre-approved event)
- Purposeful work and budget
- No write-ups

Phase 3

- 4 case meetings in 8 weeks
- Month 4: 10pm curfew
- Month 5: Pre-approved overnight stay option
- Purposeful work and budget
- No write-ups

30-DAY OPTION (Without Case Plan):

- 30 consecutive days
- Must follow all shelter rules
- No case management
- No phase advancement
- 3 write-ups + additional rule-breaking = dismissal

MEDICATION DISPENSING QUICK REFERENCE

STANDARD TIMES:

7:30 AM

7:30 PM

Unless prescription specifies otherwise

9-STEP PROCESS:

1. Guest asks for medication
2. Guest has water/at meal
3. Guest signs medication log
4. Staff retrieves and hands ENTIRE container to guest
5. Staff does NOT take medication from container
6. Guest takes dose and returns container
7. Guest takes medication in view of staff
8. Staff returns to cabinet
9. Staff initials log

CONTROLLED SUBSTANCES:

- Double-locked box
- Two staff count
- Extra documentation

DAYTIME MEDICATION:

Label Ziploc bag with med info

Guest transfers own medication to bag

Photo of prescription bottle (office phone)

Guest carries during day

EMERGENCY PROCEDURES QUICK REFERENCE

CALL 911 IF:

- Cardiac or breathing problems
- Unresponsive/unconscious
- Uncontrolled bleeding
- Psychiatric crisis/"harm to self or others"
- Fire/smoke

- Any life-threatening emergency

FIRE:

1. Activate alarm
2. Evacuate immediately
3. Don't collect belongings
4. Close doors (don't lock)
5. Go to assembly point (Men's: parking lot, Women's: playground)
6. Take headcount
7. Report missing persons to fire department
8. Wait for all-clear

TORNADO:

1. Monitor weather alerts
2. Alert all guests/staff
3. Move to shelter (Men's: office, Women's: hallways/bathrooms)
4. Bring roster for headcount
5. Away from windows
6. Crouch low, cover head/neck
7. Stay until all-clear

MEDICAL EMERGENCY:

- Assess if life-threatening
- Call 911 if needed
- Notify Case Manager/Ops Manager
- Stay with person
- First aid if trained
- Don't move unless immediate danger
- Gather medications if relevant

- Document in Night Watch/incident report
- Follow up with leadership

APPENDIX E: POLICY CROSS-REFERENCE

For complete details on specific topics, refer to these sections:

GUEST SERVICES

- Intake Procedures → Section 5
- Phase System → Section 7
- Discharge & Re-entry → Section 8
- Guest Policies → Section 9
- Food Policies → Section 10
- Medication → Section 12

DAILY OPERATIONS

- Roles & Staffing → Section 3
- Daily Operations → Section 4
- Mail → Section 13
- Phone → Section 14
- Transportation → Section 15
- TV/Video → Section 16
- Facility Maintenance → Section 17

SAFETY & EMERGENCY

- Safety & Emergency Response → Section 11

TECHNOLOGY SYSTEMS

- EcoSystem App → Sections 5 (intake) and 19 (complete guide)
- Night Watch → Section 20

POLICIES & COMPLIANCE

- Privacy & Confidentiality → Section 21

- Ethics & Boundaries → Section 22
- Social Media → Section 23
- Guest Accountability → Section 24
- Incident Reporting → Section 25

APPENDIX F: GLOSSARY OF TERMS

Case Management:

Coordinated support services provided by trained Case Managers to help guests achieve housing stability and self-sufficiency goals.

Case Meeting:

Scheduled meeting between Case Manager and guest to review progress, set goals, and coordinate resources.

Curfew:

Time by which guests must return to shelter (standard 6:00 PM, with phase-based exceptions).

Discharge:

Guest's exit from the shelter, either planned (successful completion) or involuntary (rule violations).

EcoSystem App:

Primary database and case management software used to track guest information, case meetings, and shelter operations.

Guest:

Person receiving shelter services. Preferred term over "resident" or "client."

Infraction/Write-Up:

Formal documentation of rule violation by Case Manager.

Intake:

Process of admitting new guest to shelter, including assessment and data entry.

Lights Out:

10:00 PM time when guests must be in bed and quiet.

Naloxone/Narcan:

Opioid overdose reversal medication available at shelters.

Night Manager:

Evening, Overnight, or Weekend Manager responsible for shelter during their shift.

Night Watch:

EcoSystem module for documenting shift events (replaces Daily Log).

Override:

EcoSystem process allowing ineligible guest to re-enter shelter with approval.

Phase System:

Structured 5-month program with three progressive phases, each with increasing privileges and decreasing requirements.

Purposeful Work:

Required activity for Phase System participants (employment, job search, volunteering, education, etc.).

Re-entry:

Guest returning to shelter after previous discharge.

Return Guest:

Guest who previously stayed at shelter and is seeking re-admission.

Shift Report:

Document completed each shift summarizing events and guest status.

Write-Up:

See "Infraction."

END OF OPERATIONS MANUAL

