HOUSING SPECIALIST

Client Advocacy & Problem-Solving Toolkit

Professional Download #23

Purpose
This toolkit gives Housing Specialists a clear, professional framework to identify advocacy issues, assess urgency and barriers, prepare strong written and verbal requests, track every action, and escalate appropriately when needed.

What's Inside (6 Pages)

1. Identifying the Advocacy Issue — Capture the client's concerns and desired outcome in their own words.
2. Assessing Barriers and Urgency — Structured checklist + urgency rating to decide next steps quickly.
3. Professional Advocacy Planning — Ready-to-use written request templates and phone/email scripts.
4. Action & Communication Log — Track every contact, response, and next action.
5. Problem Resolution & Escalation Tracker — Clear decision points and escalation path.
6. Professional Reflection & Handoff — Document outcomes and prepare clean case notes.

How to Use This Toolkit

Complete the sections in order. Use the Action Log throughout the process. Update the Escalation Tracker whenever the situation changes. At the end of the advocacy effort (or at case transfer), complete the Reflection & Handoff page and file it with the client record.

Important Professional Reminder
This toolkit supports professional advocacy. Always follow your organization's escalation procedures, confidentiality policies, and legal requirements. Urgent safety or legal concerns must be escalated immediately according to your agency protocols. Obtain client consent before sharing information with third parties.

Client Name / Case ID: _____ **Date Opened:** _____

Housing Specialist: _____ **Agency:** _____

1. Identifying the Advocacy Issue

Client Information

Full Name: _____ DOB / Age: _____
Case / File Number: _____ Preferred Pronouns: _____
Primary Phone: _____ Email: _____
Current Housing Status: ■ Emergency Shelter ■ Temporary ■ Permanent ■ Unsheltered ■ Other: _____

What is the main issue the client wants help with? (Use the client's own words as much as possible)

_____
_____
_____
_____
_____

What does the client say success looks like? (Desired outcome)

_____
_____
_____

Key Facts & Timeline (important dates, previous attempts, documents already submitted)

_____
_____
_____
_____

Who else is already involved? (case manager, legal aid, family, landlord, program staff, etc.)

_____
_____

Client's preferred communication method and best times to reach them:

■ Phone ■ Text ■ Email ■ In-person ■ Other: _____ Best times: _____

2. Assessing Barriers and Urgency

Barrier Checklist (check all that apply)

- ■ Lack of required documents / ID
- ■ Income verification issues
- ■ Credit / rental history problems
- ■ Criminal background barriers
- ■ Outstanding arrears / debt
- ■ Language / literacy barriers
- ■ Disability / accessibility needs
- ■ Mental health / substance use
- ■ Discrimination (race, disability, family status, etc.)
- ■ Landlord non-response or refusal
- ■ Program waitlist / funding freeze
- ■ Complicated eligibility rules
- ■ Transportation / childcare barriers
- ■ Safety concerns (DV, threats)
- ■ Legal issues (eviction, court)
- ■ Other: _____

Urgency Rating (select one)

■ IMMEDIATE — Safety risk, imminent homelessness, court deadline within 48–72 hours, or health emergency
■ HIGH — Likely to become emergency within 1–2 weeks if no action is taken
■ MEDIUM — Important but stable for the next 2–4 weeks
■ LOW — Can be addressed in normal workflow / longer timeline

Risk of Homelessness or Harm

Current risk level: ■ Critical ■ High ■ Moderate ■ Low ■ None identified
Notes on risk: _____
_____

Does this situation require specialist referral or co-advocacy?

■ No – I can handle this within my role
■ Yes – Legal aid / tenant rights organization
■ Yes – Domestic violence advocate / safety planning
■ Yes – Disability rights / reasonable accommodation specialist
■ Yes – Other: _____

Summary of assessment (2–3 sentences):

_____
_____
_____

3. Professional Advocacy Planning

Clear Written Request (what exactly are we asking for?)

We are requesting that: _____
_____
_____
_____

Supporting Evidence / Documents to Attach or Reference

■ Lease / housing agreement ■ Notices received ■ Income verification
■ Medical / disability documentation ■ Previous correspondence ■ Photos / evidence
■ Case notes summary ■ Other: _____

Phone Script (adapt as needed)

"Hello, my name is [Your Name] and I am a Housing Specialist calling on behalf of my client [Client Name / initials if preferred].
I am contacting you regarding [brief issue]. We are requesting [specific ask].
I have supporting documentation ready to share. What is the best way to submit this and who is the right person to speak with?
Thank you for your time. My direct number is [phone] and my email is [email]."

Email Script (copy and adapt)

Subject: Advocacy Request – [Client Initials or Case #] – [Short Issue]

Dear [Name / Team],

I am writing on behalf of my client regarding [brief description of the issue]. We are formally requesting [specific action or decision].

Attached / available upon request: [list key documents].

Please confirm receipt and let me know the expected timeline for a response. I am available at [phone] or [email] to discuss further.

Thank you for your attention to this matter.
[Your full name, title, agency, contact]

Preferred Contact Method for This Advocacy Effort

■ Phone first, then email follow-up ■ Email first, then phone ■ Formal letter ■ In-person meeting
Target person / office: _____ Deadline for response: _____

4. Action & Communication Log

Date	Who Contacted	Method	Outcome / Response	Next Step

5. Problem Resolution & Escalation Tracker

Current Status

■ In progress – awaiting response ■ Partial resolution ■ Fully resolved ■ Escalated ■ Closed / withdrawn

Escalation Path (if needed)

Level 1 (direct request): _____ Date: _____ Result: _____
Level 2 (supervisor / manager): _____ Date: _____ Result: _____
Level 3 (formal complaint / external): _____ Date: _____ Result: _____
Level 4 (legal / regulatory): _____ Date: _____ Result: _____

Final Outcome Summary

_____
_____
_____

6. Professional Reflection & Handoff

What worked well in this advocacy effort?

_____
_____
_____

What was challenging or did not work?

_____
_____
_____

Lessons learned / recommendations for similar cases

_____
_____
_____

Recommended Next Actions for the Case File

■ Close advocacy issue – outcome achieved
■ Monitor for follow-through (review date: _____)
■ Transfer / hand off to: _____
■ Continue advocacy – next step: _____
■ Other: _____

Confidentiality & Consent Notes

■ Client consented to information sharing with the parties contacted
■ Limits of consent noted: _____
■ No third-party contact was required

Housing Specialist Signature	Date	Supervisor Review (if required)
_____	_____	_____

File this completed toolkit with the client record. Update the case management system with the final outcome and any open follow-up tasks. If the issue was escalated externally, note the external reference numbers here: _____