



STANDARDS OF PRACTICE **for Maternity Housing Organizations**

In an effort to see maternity housing programs be successful and sustainable, the National Maternity Housing Coalition crafted the following checklist. The checklist may be thought of as a minimum standard or a health assessment for maternity housing organizations. Rather than an imposed regulation, the Standards of Practice should be thought of as a way for all maternity housing programs to elevate their organizational strength. For additional information, please contact the National Maternity Housing Coalition at <http://natlhousingcoalition.org/>

Organization Infrastructure

Mission and Organizational Culture

- Have a Mission Statement.
- Have some type of document outlining Core Values / Guiding Principles / Statement of Faith.
- Have a clear life-affirming position in writing. In addition, organizations should discern deeply about having a position in writing in regards to the definition of marriage and the unwillingness to promote contraceptive use.
- Have a clear position regarding identity as a Christian organization in writing. (Note: Based on ADF publications, Heartbeat recommends describing entity as 'religious and charitable organization' within incorporation documents.)
- Review these documents at least every three years with Board of Directors.

Human Resources

- Have written Job Descriptions.
- Do reoccurring background checks on all staff members, especially those in regular contact with residents.
- Have a Staff Orientation in place for all new hires.
- Have at least annual Evaluation Practices in place for all employees and key volunteers.
- Have at least monthly check-in between supervision and all employees.
- Ensure the organization has clear lines of authority, typically via an org chart.
- Have ongoing (more than monthly) conversations with front-line staff about their well-being and health in light of the challenging work associated with maternity housing.
- Have an Employee Manual documenting key policies in writing. Manual should include a Whistleblower's Policy.

Fundraising

- Keep record of supporters and volunteers with some type of database management tool.
- Have diverse streams of income (i.e. Events, Grants, Direct Mail, Campaigns, Online, Other)
- Thank all financial gifts within a month of receiving and provide an appropriate tax receipt based on IRS guidelines.
- Maintain confidentiality of donor data.
- Follow state guidelines regarding solicitation (i.e. r1affles)

Accounting & Financial Management

- Maintain all appropriate insurance. Speak annually with an insurance agent to review coverage. Coverage to consider includes:
 - General Liability.
 - Directors & Officers (D&O)
 - Property or Renters Insurance
 - Vehicle Insurance
 - Worker's Comp
- Have Board approve (with opportunity for discussion and modification) an annual budget. It is recommended to create budget by program, by location, and/or by business type (i.e. social enterprise.)
- Annually file Federal 990 with the IRS. Have Board approve prior to submission. Additional filings may be required (varies by state) including State 990s and/or Permission to Solicit Funds. Ensure a rationale for making Programmatic / Administrative / Fundraising allocations as needed for IRS financials.
- Establish a threshold of Board approval for unbudgeted expenses, contracts established, or debt acquisition.
- Have at least quarterly financial statements that use the same line items and categories as budget.
- Have Board approve quarterly financial statement. Have ability to compare financial statements over time to understand trends. Have an annual financial review or independent audit, depending on the size of the organization.
- Have basic financial policies in place (e.g. what is the minimum value for an item added to asset listing? What separation of duties allows for checks and balances in financial systems?) Note: the IRS expects organizations to have and follow a Financial Record Retention policy.

Vehicles

- Have a staff member with designated responsibility for upkeep and car maintenance records for vehicles owned by organization.
- Have policies established around vehicles (i.e. having uninsured vehicles on property, volunteers providing rides, who has permission to transport). Consider pulling Driving Record (i.e. tickets, moving violations) for those with authority to transport. Have resident sign release forms in accord with your policies.
- Have safety expectations established and taught (i.e. seat belts, car seat use).
- Hold Driving Orientation for those authorized to transport residents.

Marketing

- Have an organizational logo.
- Have an organizational website with capacity for regular maintenance.
- Create marketing materials to facilitate referrals and donors.
- Consider creation and implementation of a media plan.

Legal:

- Ensure the following documents are available upon request and/or reviewed regularly.
 - Bylaws (Review at least every three years.)
 - Articles of Incorporation (Review at least every three years.)
 - Board Minutes (Required at least for annual meeting.)
 - IRS Tax Letter (Review annually.) In addition, some states have a sales tax exemption document that is required to be filed and should be reviewed annually.

- Recent Financial Statement (Review quarterly.)
- Key Contracts (Reviewed annually and/or upon renewal.)
- Key Documents (Deeds, Titles to Vehicles, etc) (Ensure stored in fire proof, theft deterrent storage.)

Board

- Have at least one formal Board meeting quarterly with an agenda and minutes recorded.
- Make use of Committee Structure as needed, especially for fundraising, Board recruitment / orientation, executive functions.
- Have independent Board members that represent the community at-large and are in a position to evaluate organization and Executive Director without bias. Bylaws should further define qualifications.
- Complete some type of Assessment of Organizational Health every five years.
- Complete Evaluation of Executive Director and benefits packages annually.
- Board spends time with a planning focus annually, perhaps as a Strategic Planning meeting.
- Have discussion on succession planning, especially for key roles, at least every other year.
- Have Board members sign a Conflict of Interest policy.

Local/Regional/State Regulations

- Follow legal limits related to zoning and go through permitting process as needed.
- Ensure adequate egress from building as dictated by fire safety. Have adequate fire suppression available as needed (e.g. fire extinguishers, sprinkler system)
- Know and follow required state regulations related to licensing (might include health code, housing for minors, group living licensure, or more.)

Mission Implementation:

Staff

- Have written expectations related to program implementation (i.e. forms, job descriptions.)
- Have system in place for regular internal communication to build consistency (i.e. staff meetings, email contact, log-book, norms for taking messages).
- Have a habit of debriefing difficult, unusual, or potentially dangerous situations for staff well-being and for organizational health.
- Have policy that distinguishes between the roles of professional services (i.e. counseling, social work, nursing) and other support services (i.e. mentoring, support.) Some professional roles may require appropriate licensure.
- Have ongoing external training opportunities for all staff at least annually and internal training available at least quarterly.
- Have structure in place for regular staff respite, especially live-in positions.

Safety / Health

- Have systems established for regular cleaning, house maintenance, and upkeep. Have system for dealing with potential hazards (i.e. tripping, exposed electrical, water leaks).
- Have awareness of communicable diseases and public health. Use “universal precaution” practices as norm (e.g. clean-up of body fluids.)
- Attempt engagement with the neighborhood (including neighbors, local law enforcement, etc) for heightened awareness of house.
- Have norms in place around access points (i.e. doors and windows) to ensure safety (i.e. locking the doors at night).

- Have basic Emergency Planning systems (i.e. Communication Plans, Emergency Contact Info, Policy for Missing Resident) and fire safety systems (i.e. fire drills, escape routes) established.
- Keep First Aid supplies and fire extinguishers on hand.
- Have ability to lock medications and policies in place to avoid misuse.
- Maintain good hand-washing supplies and practices.
- Have food rotation practices and temperature-appropriate food storage in place.
- Have precautionary practices in place and respond to outbreaks (real or potential) of bedbugs, lice, mice, mold, etc.

Move - In

- Use recruitment materials that reflect the diverse experiences of the women being served.
- Have standardized Acceptance Criteria, Disqualifying Criteria, Required Forms & Information that are consistent so as to avoid discrimination.
- Establish clear system for Intakes that addresses questions like: Who is Involved? How is final decision made? Who communicates with potential resident?
- Have resident sign releases prior to or upon move-in as needed for policies listed below.
- Maintain resident files and notes regarding initial contact, admission & stay, and discharge.
- Have system in place to orient the resident to the program.

Move – Out

- Establish exit norms (i.e. Checklist for move-out tasks, Itemization of program belongings, List of Resource referrals, Opportunities for ongoing connection / Aftercare.)
- Have a policy established around immediate termination from program.
- Whenever possible, conduct exit interviews with residents. Use information for program improvement.

Structures for Mission Implementation

- Have a schedule or calendar of activities with clarity on expected participation.
- Have written Rules & Expectations and provide a copy to residents prior to or upon move-in.
- Have a clear (e.g. not arbitrary) consequence system that is proportional to the offense committed and maintains the dignity of the residents.
- Have system for household expectations that is easy to understand (i.e. chores, preparing meals.)

Resident-related Policies:

- At minimum, have written policies around the following:
 - Weapons / Violent Behavior / Threats of Violence
 - Drug & Alcohol Use or Drug Seeking Behaviors while in Program
 - Medications
 - Smoking
 - Inappropriate Sexual Relations
 - Suicidal Ideation / Threat of Suicide
 - Having Pets (including Service Animals)
 - Visitors to the House
 - Nights Spent Away from the House
 - Residents and Money (i.e. savings requirements, program fees, loans, lending money to or purchasing things from other residents.)
 - Government Assistance while a Resident
 - Grievance Process
 - Childcare and Babysitting

- Communication with Other Organizations (i.e. Signed releases, Disclosure Norms)
- Use of quotes, video, images, resident stories, and other personal disclosures for marketing, fundraising, or any other use.
- Accessing donations and supplies for the house.

Awareness / Confidentiality

- Store resident files in a locked place and limit access to staff. Destroy old files in an appropriate manner that respects confidentiality.
- Have culture of mindfulness about confidentiality of resident information (with volunteers, with other residents, etc.)
- Have annual training for key staff related to presenting adoption using current norms and language.
- Build organizational culture respectful to differing traditions, ethnic backgrounds, and perspectives.
- Have policy in place for posting photos of property and other residents on social media platforms.

Child Safety

- Promote safe sleeping practices (i.e. SIDS prevention.)
- Have staff members trained in infant first aid, CPR, water safety.
- Have childproofing practices (i.e. cords, outlets, access to chemicals, no standing water.) Follow a high-level of safety recommendations, such as those provided by American Academy of Pediatrics.
- Follow car seat and crib requirements. Monitor major trends in recalls.
- Have system for labeling and dating stored breast milk.
- Be aware of immunization requirements in your local area.
- Have system in place to monitor infant development and milestones.

Volunteer Involvement

- Screen volunteers, often by degree of contact with residents and their children, for potential safety concerns and organizational alignment.
- Hold Volunteer Training for every volunteer with personal contact with residents on topics related to relational expectations (i.e. Boundaries, Consistency with Organizational policies, Confidentiality, Norms around physical contact, Clarity of role.)

Evaluation

- Maintain basic Demographic Metrics (i.e. number of women served annually, nights of shelter provided.) Consider tracking additional demographic trends including age of residents, point in pregnancy at move-in, ethnicity, length of stay, utilization rate of facility, rate of adoption placement, birth weight of the baby, or referral sources.
- Anticipate the need to measure Impact Metrics. Build structures (i.e. intakes, exit interviews, note tracking) with need for impact metrics in mind.