Notice Establishing Additional Requirements for
Coordinated Entry

March 2017
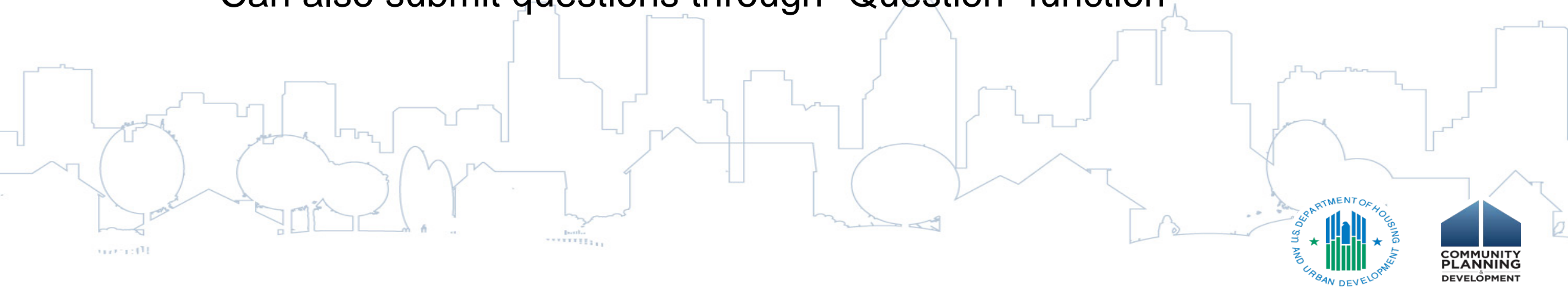
Housekeeping

Logistics:

- 90-minute webinar
- All lines are muted
- Submit technical issues through "Question" function

Asking questions:

- There will be periodic pauses to discuss questions
- Can also submit questions through "Question" function

Learning Objectives

By the end of the booster training participants will be able to:

1. Explain the fundamental goal of coordinated entry as a systems management approach
2. Identify the essential elements of coordinated entry required for implementation
3. Use and apply training and TA materials to support local CE development and operations

POLL QUESTION #1 - select one response

Of the options listed below which best describes the current status of your CoC's Coordinated Entry process:

1. My CoC is **just getting started** and hasn't finalized a coordinated entry approach or design quite yet.

2. My CoC has **implemented some aspects** of coordinated entry but we still have a lot of work to do.

3. My CoC has **implemented most aspects** of coordinated entry but we have room for improvement.

4. **My CoC is done!** I'm just listening in to see if we got it right.

Future TA Tools and Products

✓ **Coordinated Entry Process Self-Assessment**

https://www.hudexchange.info/resource/5219/coordinated-entry-self-assessment/

- **CE Toolkit of Community Samples – via NAEH Center for Capacity Building website**
- **Coordinated Entry Guidebook**
- **Coordinated Entry Implementation Guide**
- **Coordinated Entry Policies and Procedures Template**
- **Guide to Coordinated Entry Data Management**
- **Designing a Community-Specific Assessment Tool**
- **CE and Advanced System Planning**
- **Fair Housing Considerations for Coordinated Entry**

How we got here: background and regulatory context

2012: CoC Program
Interim Rule; ESG
Program Interim Rule
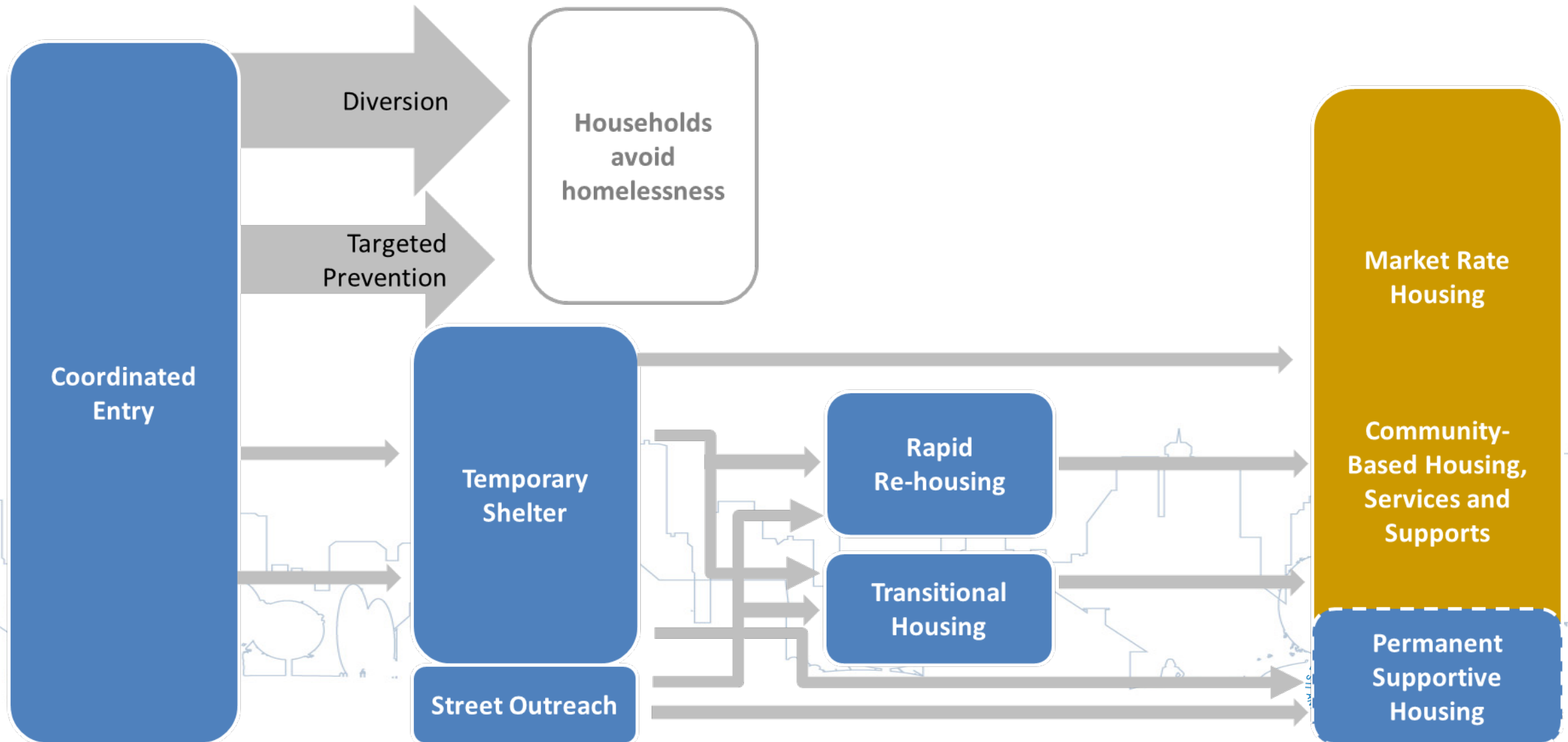
2015: Coordinated
Entry Policy Brief

2014: PSH Prioritization
Notice

- Updated in 2016,
new CH definition

2017: Coordinated
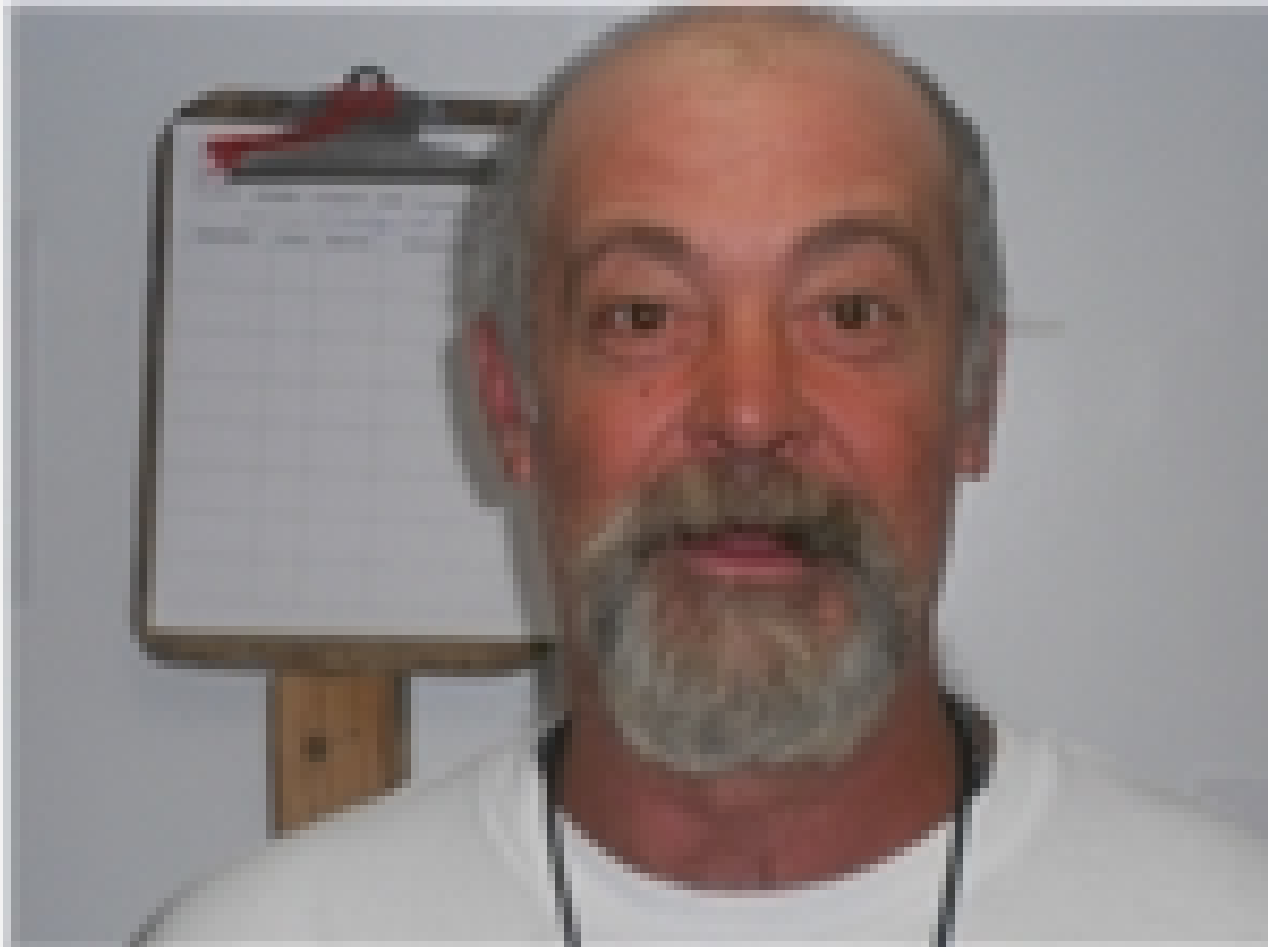Entry Notice

Coordinated Entry System in Context

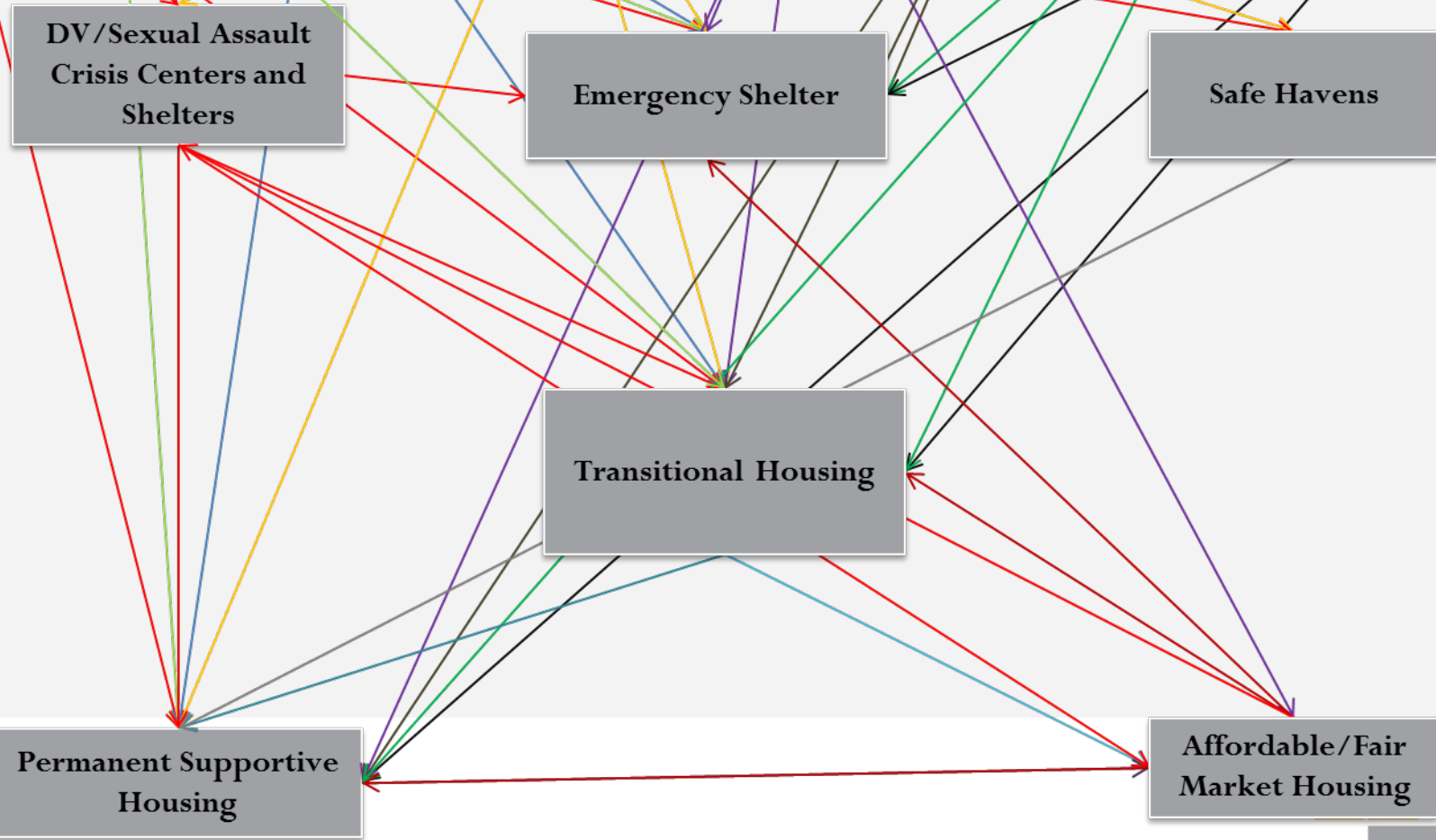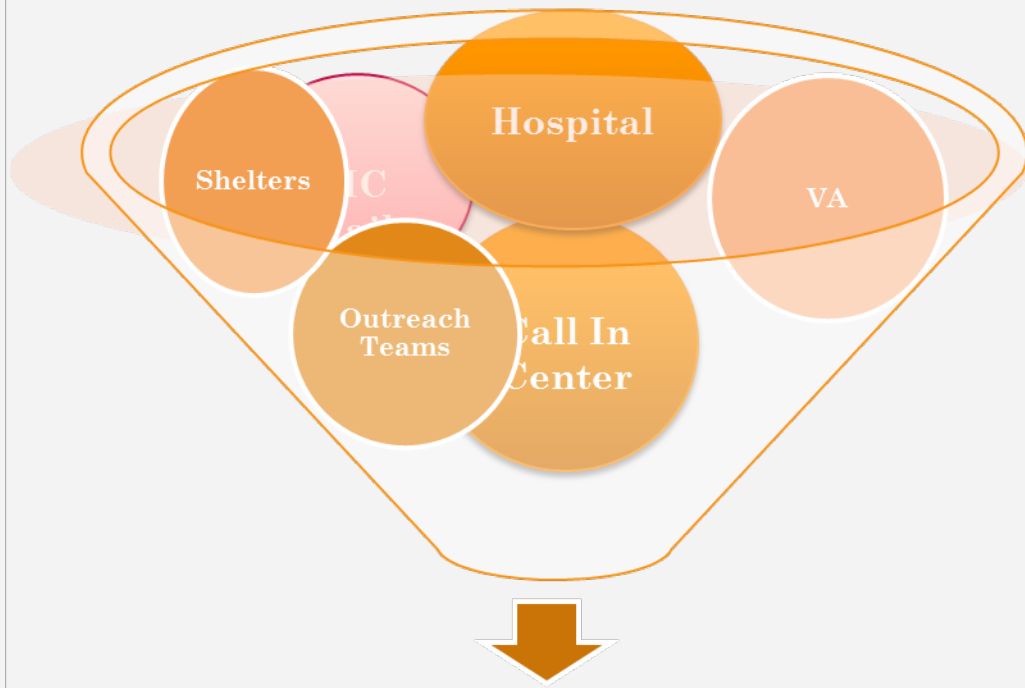# WHAT IF?

Heather Muller
Coordinated Entry Example

CSH
The Source for
Housing Solutions

Housing Placement Date.   Frequent. ▾

HMIS Enrollments

Case Name			Enroll Date	Exit Date	Case Manager	Project Name	Project Type	Organization
Jear		Louie	6/1/2015	8/17/2015			Transitional housing	
Jear			4/23/2015	8/31/2015			PH - Rapid Re-Housing	
Jear			9/28/2013	12/29/2013			Emergency shelter	
Jear			9/22/2013	9/22/2013			Services Only	
Jear			4/13/2013	4/13/2013			Services Only	
Jear			3/1/2013				Day Shelter	
Jear			11/2/2012	6/15/2013			Emergency shelter	
Jear			10/27/2012	10/27/2012			Services Only	
Jear			9/13/2012	5/9/2013			Day Shelter	
Jear			9/10/2012	9/24/2012			Transitional housing	
Jear			7/16/2012	7/16/2012			Services Only	
Jear			3/2/2012	3/2/2012			Services Only	
Jear			1/25/2012	9/7/2012			Emergency shelter	
Jear			11/10/2011	11/12/2011			Emergency shelter	
Jear			9/3/2011	9/3/2011			Services Only	

Countdown to Compliance

JANUARY 23, 2018
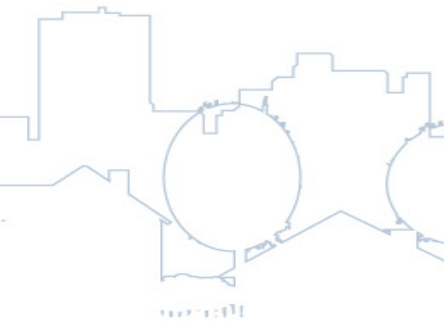
Terms & Concepts

Coordinated entry process

Affirmative marketing/outreach and non-discrimination

Access points

Assessment

Prioritization

CE policies and procedures

CoC-level vs. project-level requirements

Access Requirement: Full Coverage

Access Consideration: Different Access Points

Required: Same assessment approach at all access points.
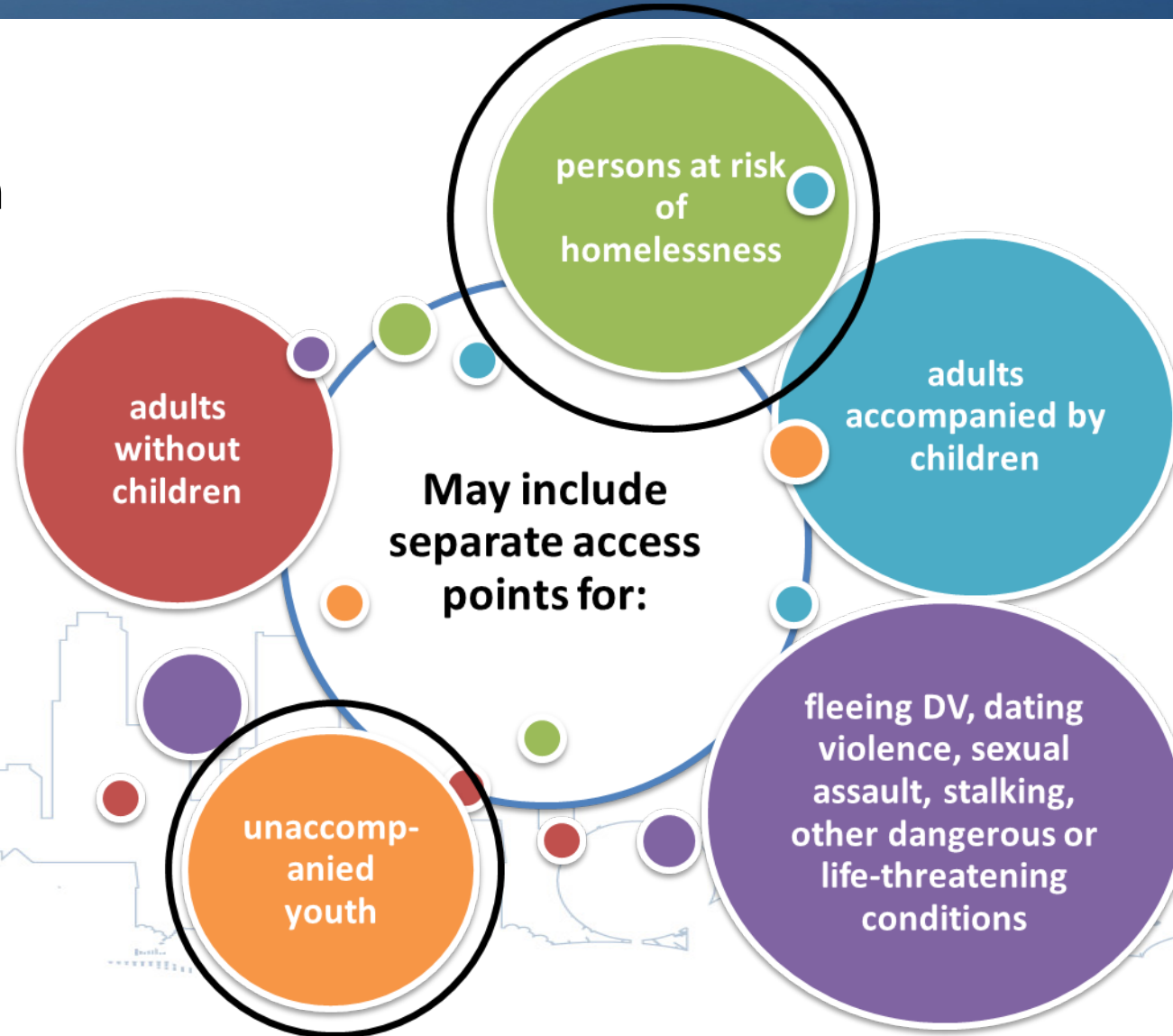
Additional Access Requirements

Ensuring Access:

- **Emergency Services**
  - Few barriers
  - Access isn't tied to CE open hours
- **Homeless Prevention**
- **Marketing and Accessibility**
  - Non-discriminatory
  - Disabilities and Language
- **Safety Planning**
  - Fleeing and seeking services from non-victim service providers
- **Street Outreach**
  - Linked to CE

Write it down: Access Requirements

CoC's written CE policies and procedures must:

- ✓ Document a process ensuring access to emergency services during off hours
- ✓ Document steps taken to ensure 1) access points are accessible to individuals with disabilities and 2) effective communication with individuals with disabilities
- ✓ Address the needs of individuals and families who are fleeing violence
- ✓ Describe how street outreach efforts funded under ESG or CoC are linked to the CE process

POLL QUESTION #2 - select one response

Which CE access requirement is most challenging to implement:

1. All access points consistently following CoC defined CE guidelines with **standardized approaches**

2. CE Access point services and guidelines are **well advertised**

3. All persons have **emergency access** to CoC crisis services regardless of business hours, subpopulation or geographic location

4. Persons with disabilities or limited English proficiency are provided **special accommodation** to ensure full access to CE services

# Assessment: Requirements and Considerations

- **Standardized process to document needs and preferences**
- **Could be completed in phases**
- **CoC provides assessor training at least once annually**

Participant presents at any access point

Standardized Assessment process

Write it down: Assessment Requirements

- ✓ Establish criteria used for uniform decision-making

- ✓ Prohibit "screening out" from assistance

- ✓ Protect all data collected through the CE assessment process

- ✓ Establish that the assessment process cannot require disclosure of specific disabilities or diagnosis

- ✓ Provide training to staff administering CE processes
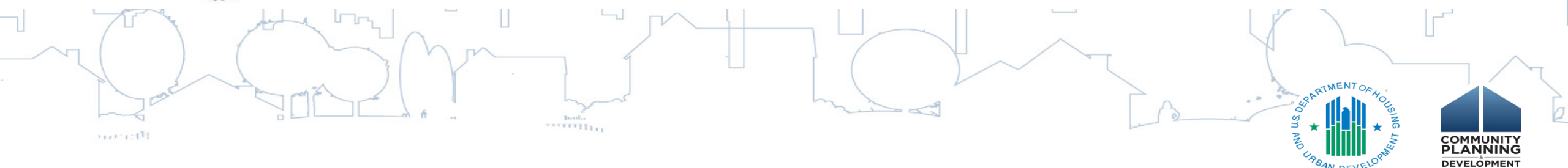
POLL QUESTION #3 – Yes or No?

CoC employs a phased approach to assessment with participant information collected according to all the following stages:

1. **Initial Triage** – resolving immediate crisis needs
2. **Diversion/Prevention** – examination of existing resources and options instead of emergency shelter
3. **Intake** – basic information necessary to enroll participant in a CoC project
4. **Comprehensive Assessment** – documentation of participant's needs, preferences, vulnerability
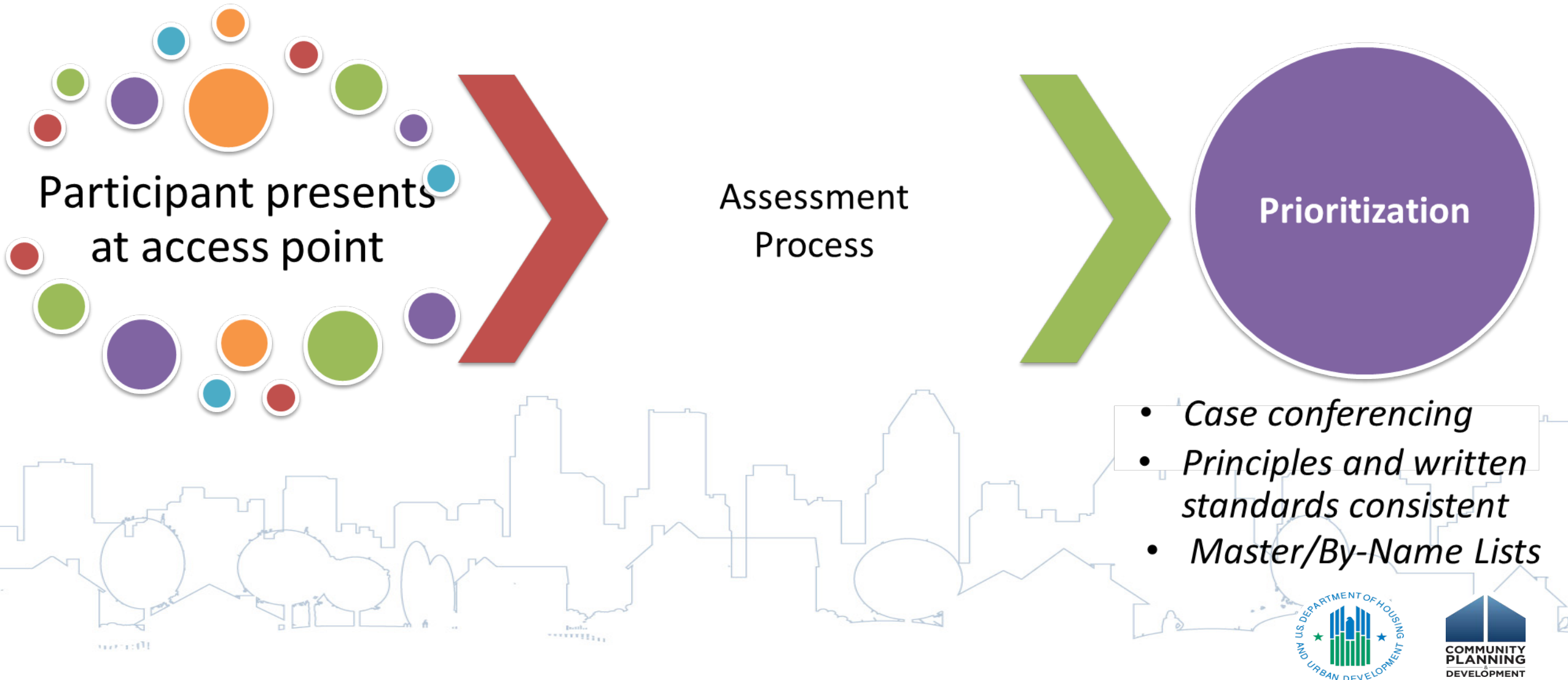5. **Next Step/Move On** – assess interest and capacity for more independent housing

Prioritization: What does it mean?

- Requirement: Prioritize most severe service needs / highest vulnerability

- But how do we know?

  - Defined by community-established principles

    - Ask: What does it mean in your community to have the most severe needs or be most vulnerable?

    - Ask: How do you account for differences in populations?

Prioritization: Requirements and Considerations

Participant presents at access point

Assessment Process

Prioritization

- Case conferencing
- Principles and written standards consistent
- Master/By-Name Lists

Write it down: Prioritization Requirements

- ✓ Document specific, definable prioritization criteria
- ✓ Include the factors and assessment information used for prioritization decisions
- ✓ Clearly distinguish between the interventions that **will** and **will not** be prioritized
- ✓ Document process for participants to file a discrimination complaint
- ✓ Specify the conditions for participants to maintain their place in CE prioritization lists when the participant rejects options

POLL QUESTION #4 - select one response

Your CoC's prioritization process, documented in policies and procedures, incorporates which of the following approaches? Select the best response?

1. Standardized decision assistance tool

2. Locally-defined factors and scoring

3. Case conferencing

4. Some combination of any or all of above

Referral Requirements and Considerations

Participant presents at access point

> Assessment Process

> Prioritization

> **Referral**

- *Uniform across projects*
- *No screening out*
- *For CoC and ESG projects, CE is only referral source*

Write it down: Referral Requirements

- ✓ Document assessment, vulnerability and need-based factors used to make prioritization decisions, including homelessness prevention services
- ✓ Include a process by which individuals and families may appeal coordinated entry decisions
- ✓ Document protocol for participant rejection of a referral

I operate a project that receives no CoC program or ESG program funds. Must I only accept referrals from the CoC's defined CE referral process?

1. **Yes**, all projects regardless of funding source must accept CE referrals.

2. **No**, homelessness assistance agencies who receive no HUD funding are not obligated to accept referrals from the CE process.

3. **It depends**. The CoC may establish local CE referral protocols that extend requirements for participation to all local homeless assistance providers within the CoC's geographic area.

Questions on core elements?
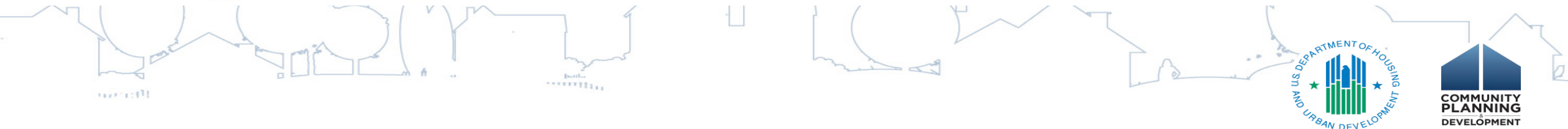
Infrastructure Element: Planning
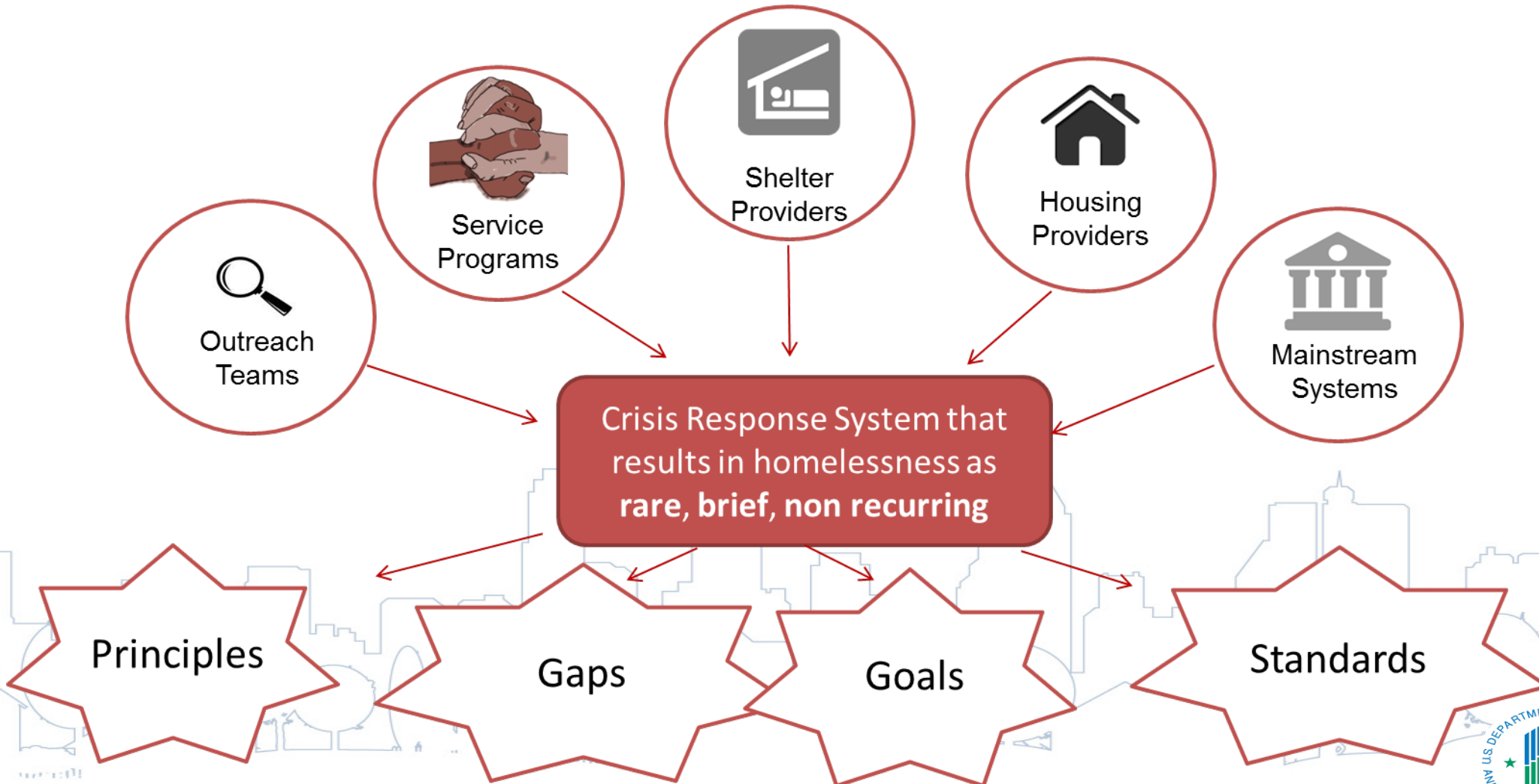
Write it down: Planning Requirements

- ✓ Establish policies guiding CE operations

- ✓ Define CE geography, participation expectations and roles, training, oversight and management

- ✓ Align written standards for providing CoC assistance with written policies and procedures for CE

- ✓ Ensure equal access to CE for all persons

Infrastructure Element: **Management & Oversight**

Questions:
- ✓Who develops/adopts/revises policies?
- ✓Who sets performance expectations?
- ✓Who monitors performance?
- ✓Who resolves conflicts?

Infrastructure Element: Data Management

Data considerations:
- ✓ Documenting participant needs and preferences and coordinating service delivery
- ✓ Maintaining Master/By Name List
- ✓ Protecting participant privacy
- ✓ Maintaining data security
- ✓ Evaluating Coordinated Entry
- ✓ Evaluating System Resources

Write it down: Data Management Requirements

- ✓ Ensure adequate privacy protections of all participant information
- ✓ Define protocol for participant consent to share data
- ✓ If using HMIS, ensure all users are trained and understand CoC privacy and security expectations
- ✓ Prohibit the denial of services if participants don't share
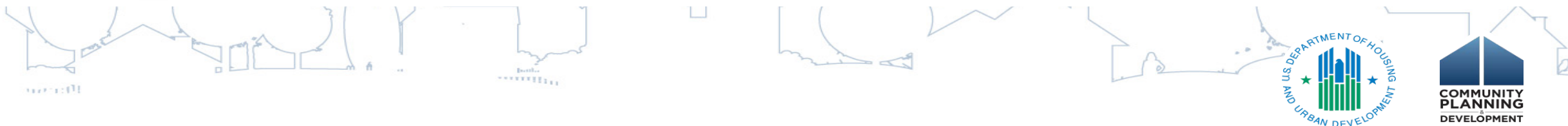
Infrastructure Element: **Evaluation**

Annual CE evaluation answers the following questions:

✓Does CE work for persons experiencing a housing crisis?

✓Does CE work for providers of homeless assistance?

✓Is CE functioning according to CoC's design principles?

✓Is CoC system more efficient and effective as a result of CE?

Write it down: Evaluation Requirements

✓ Define frequency and methods by which CE evaluation will be conducted
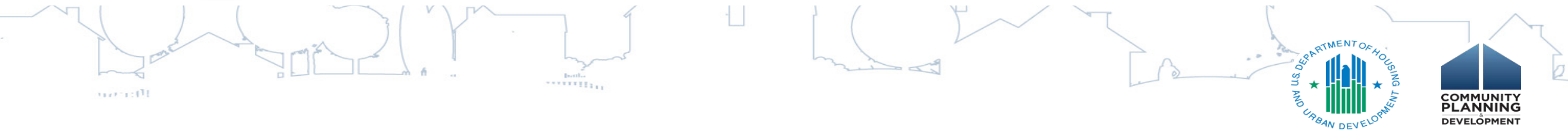
Questions on infrastructure elements?

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