

# PLANNING AND IMPLEMENTATION OF A CENTRALIZED/COORDINATED ASSESSMENT WITH ESG GRANTEES

# Who are we?

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# Who are you?

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- Name
- What is your role at the organization?
  - ▣ Executive Director
  - ▣ Financial staff
  - ▣ Case Manager
  - ▣ Another position
- What do you hope to learn from this training?

# Logistics

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- Resource materials
  - ▣ Download from Housing Works conference site
- Restrooms and telephones
  - ▣ Please silence or turn off cell phones.

# Presentation Agenda



## Coordinated Assessment:

- Definitions & requirements
- Key elements
- Potential models
- Next steps

# Coordinated Assessment

A white arrow-shaped sign with black text pointing to the right, set against a background of tall corn plants under a blue sky with white clouds. The sign is mounted on a wooden post.

ENTER MAZE

# What is Coordinated Assessment?

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- Background:
  - ▣ Emerging “**Best Practice**” for CoCs – coordinated entry, common assessment and matching consumers to services.
  - ▣ **Emphasized by HUD** in 2008 RRHD and 2009 HPRP programs.
  - ▣ Interim **ESG and CoC rules require** ESG and CoC to mutually establish and operate “either a centralized or coordinated assessment system” within their mutual geographic area.

# What is Coordinated Assessment?

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Terms to describe the process can vary:

- Coordinated Assessment, entry or access
- Centralized Intake
- Synchronized Assessment
- For decentralized models – the “No Wrong Door” approach



# What is Coordinated Assessment?

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## ESG Requirement:

- ESG recipients and sub-recipients will be required to participate in the centralized or coordinated assessment system established by the CoC operating in the area they serve.
  - Effective when HUD publishes final CoC rule

# What is Coordinated Assessment?

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## CoC Requirement:

“In consultation with ESG recipients within the geographic area, establish and operate either a centralized or coordinated assessment system that provides an initial, comprehensive assessment of the needs of individuals and families for housing and services”. (Includes requirements for written policies and standards.)

# What is Coordinated Assessment?

Definition from the Interim CoC Rule:

**Centralized or coordinated assessment** is ... a centralized or coordinated process designed to coordinate program participant intake, assessment, and provision of referrals. A centralized or coordinated assessment system covers the geographic area, is easily accessed by individuals and families seeking housing or services, is well advertised, and includes a comprehensive and standardized assessment tool. This definition establishes basic minimum requirements for the Continuum's centralized or coordinated assessment system. (Section 578.3)

# What is Coordinated Assessment?

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Definition Defined!

***Centralized or coordinated assessment is:***

- ❑ Centralized or coordinated
- ❑ Coordinates participant intake, assessment, referrals
- ❑ Covers the (CoC/ESG) geographic area
- ❑ Easily accessed by those seeking housing/services
- ❑ Well advertised
- ❑ Uses a comprehensive & standardized assessment tool.
- ❑ *System must meet these basic, minimum requirements*

# Key Elements

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- HUD's definition is broad
- Establishes minimum requirements
- Allows flexibility based on
  - ▣ Geography
  - ▣ Population
  - ▣ Level of need
  - ▣ Other local factors

A photograph of a dirt path winding through a forest. The path is light-colored and leads into the distance. The trees are tall and thin, with bare branches. In the foreground, there are tall, brown grasses. The overall scene is somewhat dim and atmospheric.

# Creating a Clear Path

# Key Elements

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## □ ACCESS –

- Assessment point(s) should be **easily reached** by homeless and at-risk households.
- Assessment point(s) should be **advertised and well-known**.
- How to handle **after-hours access!**
- Special consideration for **special-need populations** (domestic violence survivors and others)

# Key Elements

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## □ **ASSESSMENT -**

- Uniform and consistent assessments
- Use of common assessment tool
- Use of standards for referral and service connections
- Process should be designed to increase:
  - Consistency
  - Fairness
  - Positive Outcomes



# Key Elements

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## □ **Data -**

### □ Consistent process for

- **Gathering** data/information
- **Entering** data into HMIS (as appropriate)
- **Sharing** information across programs – avoid collecting the same info multiple times!
- **Protections** in place for sensitive information

# Key Elements

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## □ Referral -

### □ Consistent, documented **criteria for referrals**

- Which interventions fit for which households?
- How will referred consumers physically get to the referral site?
- Clear guidance is needed based on need and eligibility
- Flexibility is also needed based on consumer preference

# Key Elements

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## □ Intake -

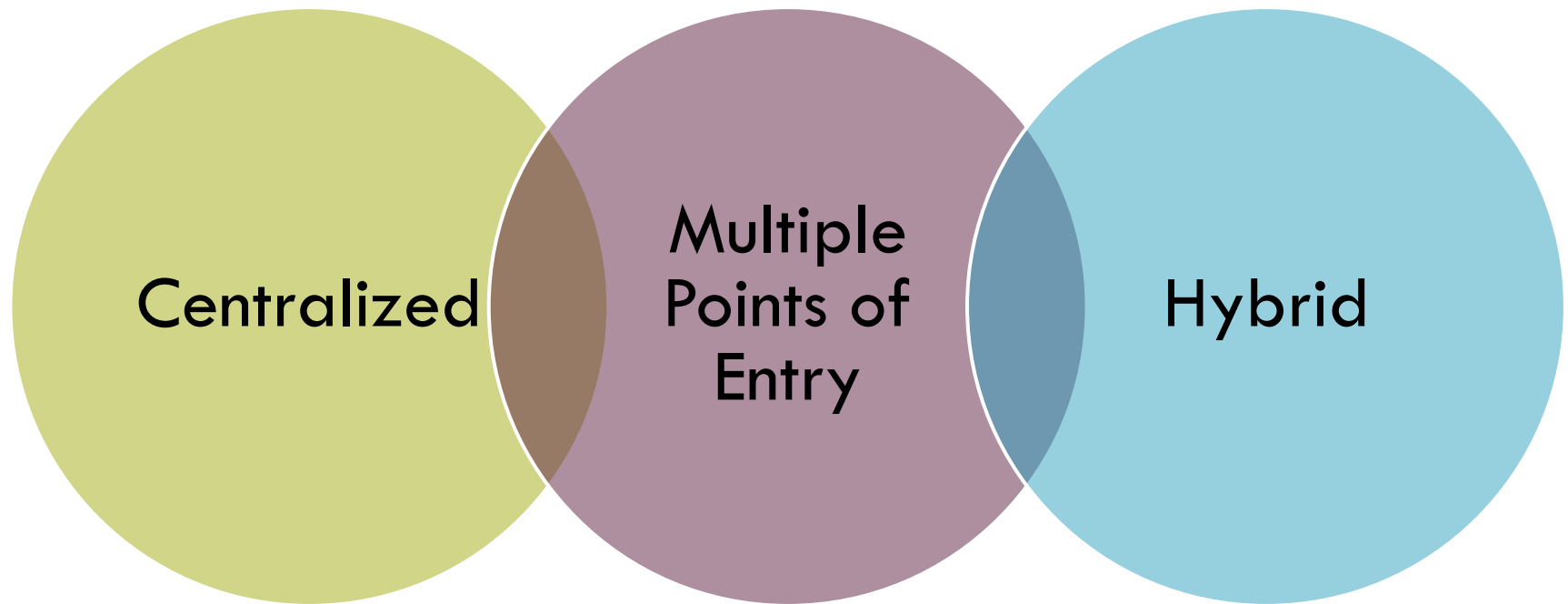
- Intake into one of the system's housing or service programs should be **coordinated as much as possible**:
  - Minimize repetition of questions covered in the initial assessment.
  - Don't repeat or duplicate paperwork, if possible.
  - Upon entry, assessment should continue and focus on a plan to exit to permanent housing.

# Sum of Key Elements – System Change

- **System Change:** How will programs and resources change to become more efficient, effective, and better accommodate need?
  - ▣ The entire system may change or be adjusted.
  - ▣ Focusing system on assessment of consumer needs.
  - ▣ System-wide decision-making.
  - ▣ Requires higher level of coordination and collaboration between programs.

# Range of Models

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# Potential Models



- Centralized
- Decentralized
- Telephone-based/2-1-1
- Mobile case manager
- Mixed

# For All Models – Common Issues



- ❑ Wide advertisement for access
- ❑ Shared HMIS data and reporting
- ❑ Common intake and assessment form
- ❑ Common program definitions or models
- ❑ Written standards
- ❑ Cross-training of staff

# Next Steps

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## ***Decision Points for Each System -***

- ***Access point strategy***
- ***Assessment tool(s)***
- ***Data gathering and sharing***
- ***Referral process and standards***
- ***Intake coordination***
- ***System changes***



# Discussion Points

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- **Access** – What are the logical access points in your community? Are the best point of access different for different groups?
- **Assessment** – What is the minimum amount of information needed to assess the services a person needs?

# Discussion Points

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- **Data Gathering** – Do the best points of access currently participate in HMIS? If not, would they be willing to do so?
- **Referral Process** – Do the most common referral agencies participate in HMIS? Can referrals be done electronically? Is there information required by some agencies beyond the minimum needed for assessment?

# Discussion Points

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- **Intake** – How can you avoid making people “tell their story” again at intake – particularly if they are being referred to more than one agency?
- **System Change** – Who is at the table now? Who else needs to be at the table to make this successful?

# Additional Resources

- [Coordinated Assessment Toolkit](#) – NAEH.org  
Nat'l Alliance to End Homelessness
- [USICH Retooling Crisis Response Systems Toolkit](#) – [www.usich.gov](http://www.usich.gov)  
United State Interagency on Homelessness
- HUD Coordinated Assessment Guidebook – *coming soon at HUDHRE.info*

# Contact information

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