Simpler, Smoother, Swifter, Stronger: Actionable Coordinated Entry Evaluation

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Objectives

1. Design an actionable annual evaluation of a coordinated entry system based on federal and local priorities and goals

2. Develop an evaluation framework & data collection strategy

3. Examine system effectiveness through interviews, focus groups, surveys, and HMIS data

4. Leverage the annual evaluation process to make the coordinated entry system simpler, smoother, swifter, stronger

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Agenda

Why evaluate your CES?

Planning an actionable annual CES evaluation

Developing a data collection strategy

Collecting, analyzing, & reporting results

Implementing recommendations

Digging deeper in subsequent evaluations

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Sense of the room

My community's Coordinated Entry System has been evaluated:

❑ Not yet, but it will be soon

❑ Once

❑ More than once

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Why evaluate your CES?

Your community should evaluate your coordinated entry system on an ongoing (at least annual) basis in order to:

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1. **Ensure Proper Functioning:** Ensure that the coordinated entry system is functioning as intended & working for all stakeholders

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2. **Identify Necessary Refinements:** Identify changes & improvements that will further support coordinated entry as an evolving practice

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3. **HUD Requirement:** Evaluation of your coordinated entry system is a HUD requirement

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The Word from HUD

Guidance on CES evaluations found in:

Coordinated Entry Management & Data Guide
https://www.hudexchange.info/resources/documents/coordinated-entry-management-and-data-guide.pdf

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Mandatory Elements of Annual Review

Consult with each participating project & project participants at least annually to evaluate intake, assessment, and referral processes & quality & effectiveness of coordinated entry experience

CES policies & procedures must describe evaluation frequency & methods as well as the process by which the evaluation is used to implement updates to policies and procedures

Adequate privacy protections of all participant information collected

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Planning for CES Evaluation

➢ Review CES policies & procedures about evaluation

- ✓ Ensures consistency to decisions already made about roles & process
- ✓ Important to be clear about responsibility for developing & implementing recommendations for evaluation (who owns the process?)

➢ Can make CES evaluation a fixed part of your annual calendar

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How long does all of this take?

➢ CES evaluation as we will describe today takes two to three months

➢ Consider a staggered cycle for evaluation
  - ✓ **Year 1:** Effectiveness review
  - ✓ **Year 2:** Review outcomes of implemented recommendations + compliance
  - ✓ **Year 3:** Review outcomes of implemented recommendations from Y1 & Y2 + system trouble-spots

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Phases of CES Evaluation

Developing Scope	Selecting Methods	Gathering Information	Analyzing Results	Calibrating the System

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Developing Scope

1. Determine the extent of your evaluation
    Access? Assessment? Prioritization? Referral? All phases?

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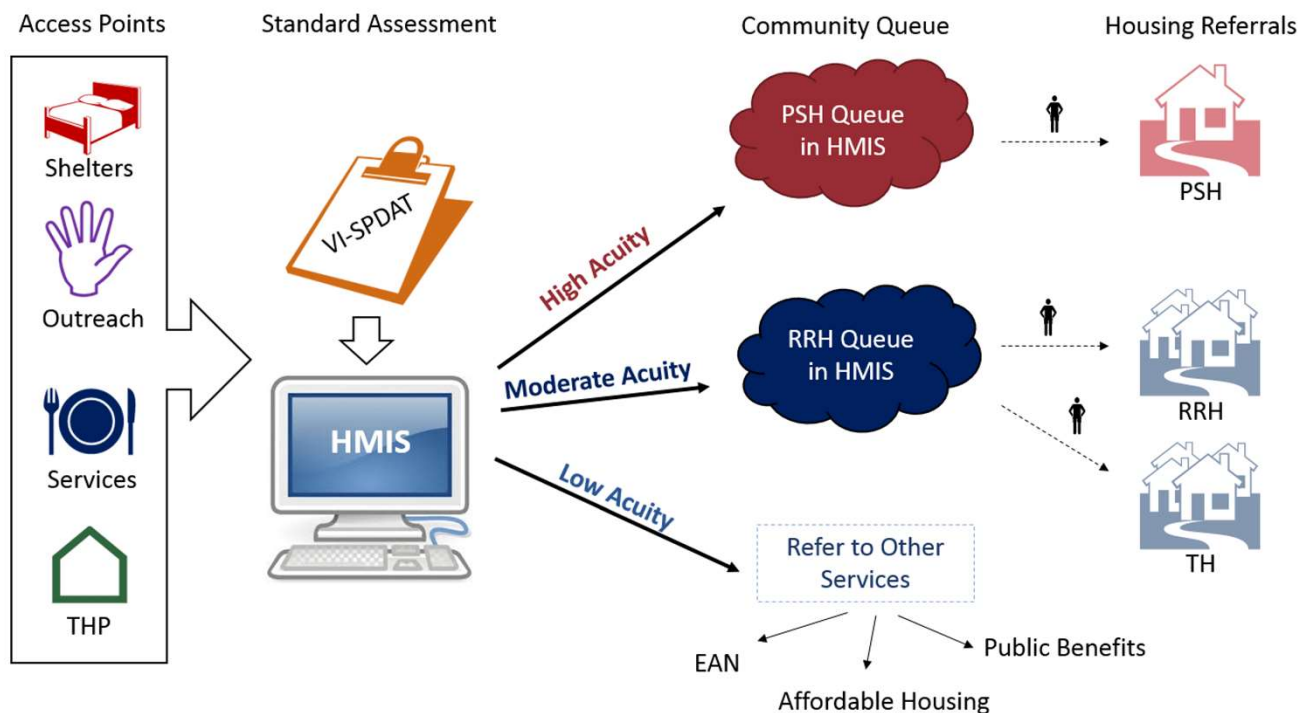Building Connections:
Bridging to the Future
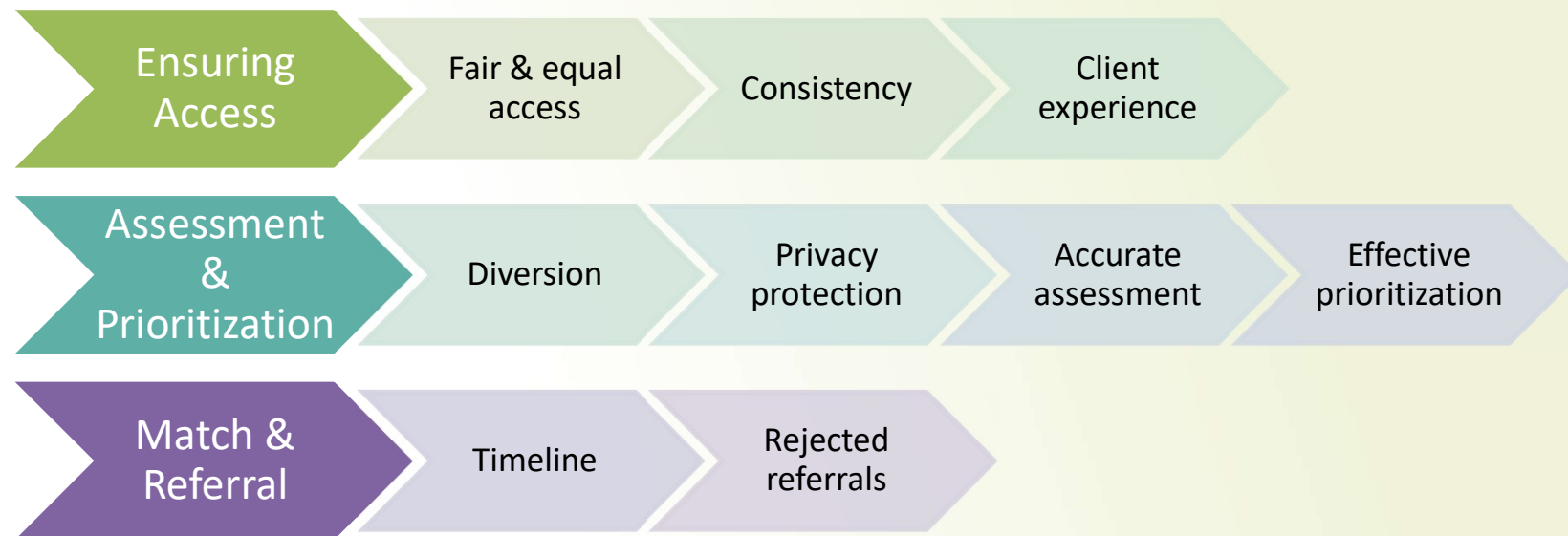
Developing Scope

1. Determine the extent of your evaluation
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2. Present information & solicit feedback
   "This is our mandate on X…"
   "This is our goal on Y…"
   "How are we doing?"

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3. Elicit challenges experienced by key players
   "Where are you experiencing roadblocks and bottlenecks?"

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4. Discuss previous evaluation or any other relevant data collected so far & solicit input
   "What, if anything, has changed?"

The Santa Clara County System

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Prioritizing Values & Concerns in 2017

Ensuring Access	Fair & equal access	Consistency	Client experience	
Assessment & Prioritization	Diversion	Privacy protection	Accurate assessment	Effective prioritization
Match & Referral	Timeline	Rejected referrals		

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2017 Evaluation Framework

Interviews

Matchmakers

Access point agencies

Agencies receiving referrals

Focus Groups

Unhoused consumers

Housed consumers

Providers

Surveys

Providers

Consumers

Data Analysis

HMIS

Other systems?

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Questions for matchmakers in 2017

Training

Internal Coordination

Matchmaking Process
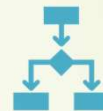
Referral Process

Referral Rejections

Assessment Efficacy & Consistency

Questions for providers in 2017

Accessibility & Client Experience

Assessment Efficacy & Consistency

Diversion

Client Consent to Share Information

Referral Process

Enrollment Process

Focus group questions for consumers in 2017

Messaging/ Marketing

Accessibility & Assessment

Connection to Services

Referral to Housing

Tips on Surveys & Focus Groups

➢ Tie questions to focus areas to avoid "feedback" that is difficult to categorize, analyze & review

➢ Ensure consistency of question phrasing between surveys & focus groups

➢ Create a strategy for informing interested parties about feedback opportunities

➢ Cast a wide net seeking survey & focus group participants & engage lived experience partners

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More Tips on Surveys & Focus Groups

➢ Work with community partners who have this skill, e.g., market research professionals, colleges/universities, board members

➢ Effective focus groups require planning & know-how

   ✓ Equal opportunity for all to speak

   ✓ Managing "mega-participators"

   ✓ Re-focusing the conversation

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Data Analysis in 2017

Ensuring Access	Assessment & Prioritization	Match & Referral
• Assessments: Where? When? Which? How many?	• Completeness & duplication of assessments	• Referral rates (cumulative & by acuity)
• Assessment vs. PIT Count demographics	• Validity of & compliance with consents to share information	• Time from first assessment to first referral, to program enrollment, to housing move-in
• Where did consumers live when they lost their homes?	• Distribution of assessment scores	• Referral rejections (by program type & by time on community queue)
		• Reasons for referral rejections by program type

Calibrating the System: Ensuring Access

Identify opportunities to advertise coordinated entry & publicize list of access points throughout community

Draft policies & procedures on how non-VSPs should identify & serve DV survivors

Develop informational materials for clients on what to expect after assessment & FAQ/myth-busting guidance for providers

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Consistent & Accurate Messaging: Client FAQ

1. What is the standard assessment and why did I take it?
2. How is my information stored? / What is HMIS?
3. What happens next?
4. Is the Community Queue a waiting list?
5. If I reported honestly about my past, will that hurt my chances for housing?
6. Am I guaranteed to get housing through this process?
7. What can I do after taking the standard assessment?

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Calibrating the System: Assessment & Prioritization

Develop internal controls to ensure consistency in assessment administration & positive client experience

Develop protocols regarding what "changed circumstances" warranting re-assessment entail

Continue improving completeness of consents to share information through training & modifications to the form to address common issues

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Clarified Re-Assessment Policy

As long as individuals/families remain homeless, they should complete the VI-SPDAT annually to capture changes in their circumstances.

In addition, individuals/households may complete an update whenever they experience a life event or change in circumstances that substantially impacts their vulnerability. This may include, but is not limited to, a significant change in:

- ✓ Amount of income or benefits,
- ✓ Health or disabling condition,
- ✓ Ability to care for oneself or dependents,
- ✓ Family composition, and/or
- ✓ Exposure to imminent danger or risk of severe physical harm.

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Calibrating the System: Match & Referral

Develop written protocols to train & support new matchmakers

Create checklist of to enumerate expectations regarding reasonable attempts to locate referred clients

Analyze causes of ineligible referrals & identify potential process modifications to reduce rates of referral rejection

Modify HMIS interface to encourage updating client contact/location information

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Consistent, Thorough Referral Search Strategy

Check HMIS

Create public alert

Contact information

Service contacts

Profile notes

Consult other organizations/resources

VA

County inmate locator tool for incarcerations & court dates

Other outreach teams

Law enforcement officials

Medical social workers

Go out in the community

Visit homeless hotspots

Meet people within the homeless community

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Digging Deeper into Assessment & Prioritization in 2018

➢ Continuing to prioritize the most vulnerable
- ✓ Accurately assess vulnerability, taking into account medical wellbeing & cognitive impairment

Digging Deeper into Assessment & Prioritization in 2018

➢ Continuing to prioritize the most vulnerable
  - ✓ Accurately assess vulnerability, taking into account medical wellbeing & cognitive impairment
➢ Ensuring that the system is fair, just, & equitable
  - ✓ Continue deepening Housing First practice
  - ✓ Affirmatively further Fair Housing & ensure that the system does not discriminate based on race, ethnicity, gender, age, & disability status (including mental health)
  - ✓ Ensure that assessments are administered consistently
  - ✓ Foster system understanding by providers & clients

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**2018
Evaluation
Framework**

1. Identify areas where the assessment & prioritization process can be improved (big group)

2. Determine changes to reinforce subcommittee values (smaller group)

3. Prioritize proposals & develop implementation plan (smaller group + Lived Experience Advisory Board)

4. Evaluate progress (big group)

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Data Analysis in 2018

➤ Time from assessment to referral, to enrollment, to housing move-in by score

➤ Wait time for households not referred yet

➤ Access, referral, enrollment, & housing move-in by race, ethnicity, gender, age, & physical & cognitive/developmental disability

➤ Referral denial reasons

➤ Responses to health & disability questions on assessment vs intake vs post-enrollment

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Contact us!

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