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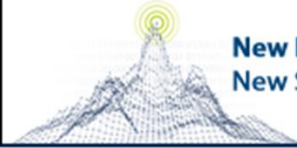
April 18-19, 2018

Coordinated Entry Policies and Procedures: A Practical Application

**Kathleen Freeman
The Cloudburst Group**



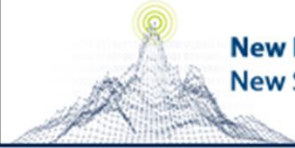
**New Frontiers in Data
New Systems, Partners, and Technologies**



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Objectives

- Understand Impact of Policies and Procedures on Clients
- Understand Difference between Policies and Procedures and Operational Policies and Procedures
- Learn how to evaluate your CE Policies and Procedures for operational realistic-ness
- Learn how to identify where your CE Policies and Procedures have gaps and how to resolve them



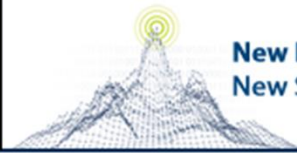
Coordinated Entry Policies and Procedures: A Practical Application

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There is no
right nor
wrong. There
are only
policies and
procedures.

Policies and
procedures
provide a
roadmap to day-
to-day
operations.

They ensure
compliance with
laws and
regulations, give
guidance for
decision-making,
and streamline
internal processes.



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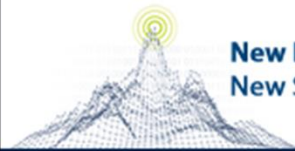
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Policies and Procedures must be written so they can be easily followed.

They provide:

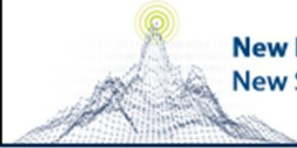
- Consistent processes and structures
- Better quality service
- Safer workplaces



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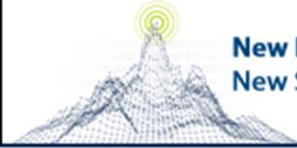
Clear
Transparent
Followable
Legal
Accountable
Effective
Accessible



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What are we going to do today?

Examine a set of Continuum of Care Coordinated Entry Policies and Procedures and see if we can use them to conduct day-to-day operations.



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Methodology

Use client scenario and CE Policies and Procedures as written to successfully meet a client's need.

Cannot make assumptions about information that is not there, either about the client or Policy or Procedure – you must attempt to successfully resolve the client scenario based solely on the written policies and procedures.

Identify areas for improvement

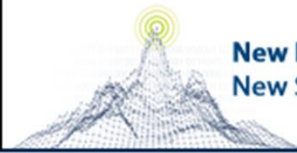
- Gaps

- Clarifications

- Incorrect procedures (advanced)

Discuss options for corrective actions





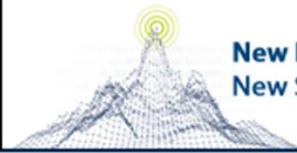
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Scenario: Outreach and Advertisement

- Mary is a single parent with a 2-year old son, Caleb.
- Mary is new to the Anywhere. She and Caleb were living with her mom in her trailer several counties over but decided to leave because she didn't feel safe around her mom's new boyfriend (though he has not been violent towards her, her mom, or her son). Mary drove here in her car and has spent a couple of nights sleeping in it.
- Mary has \$100 in her wallet and she was working as a cashier at a supermarket before she left her mom's house, so she hopes to be able to get work pretty quickly as Anywhere is a bigger community than where her mom lives. She has diapers and formula in her car but she knows she needs to find a job and a place to stay.
- Mary has stopped at a local convenience store, bought a water, and asked the nice lady at the counter if she knows of any places hiring and if she knows of any cheap places to sleep for a few nights.
- The convenience store clerk doesn't have any suggestions for Mary, other than to look at the bulletin board in the front of the store. Mary finds a flyer for Hope House, which offers short-term rentals. The picture looks nice on the front and it shows kids playing in the yard. Mary drives to the address on the flyer, only to find that the building is boarded up and no one is around.

Using Section 2.4 (Agency Outreach, Client Outreach, and Advertisement) Policies and Procedures, how does Mary find out about the Anywhere homeless system of care, find a place to sleep at night, and get connected to the Coordinated Entry System.



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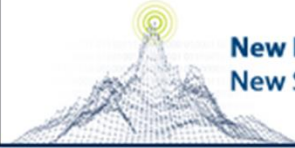
The Situation

- Agency Outreach and Advertisement:
 - Mary was not able to easily access information about the system of care
 - No public knowledge of system of care
 - Limited materials
 - The information that she did access was out of date
- Client Outreach: Mary had been living in her car for a couple of nights, but she was not approached by an outreach worker.

WHAT DO THE P&P TELL YOU ABOUT HOW MARY CAN FIND OUT ABOUT THE SYSTEM?

GIVEN MARY'S SITUATION, WHAT ADVICE WOULD YOU GIVE MARY?

ARE THERE ANY GAPS IN THE P&P? IS THERE ANYTHING YOU WOULD ADD OR CHANGE?

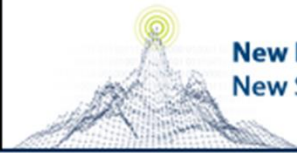


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Policy and Procedure Analysis:

- Agency Outreach and Advertisement:
 - Only required to happen annually
 - may not cover all places where a potential client could present for information
 - Marketing materials are outdated or insufficiently written.
- Client Outreach: Mary had been living in her car for a couple of nights, but she was not approached by an outreach worker. CE P&P do not:
 - state how or how often programs will canvas areas to ensure geographic and timeliness coverage of areas where unsheltered persons may stay.
 - Indicate suggested or required partnerships with non-participating and/or non-traditional agencies,
 - Access: Because outreach and marketing efforts failed to adequately point Mary to a Lead Agency, she is denied access to the CE system.



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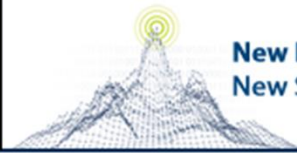
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Scenario: Screening and Immediate Needs

- Mary drives around Anywhere and sees a building with a sign that states “Anywhere Rescue Mission”.
- She hesitates about stopping, but her son needs a bath and her back hurts from sleeping in the car so she parks the car and goes in. She hopes it is a church mission that can offer her some extra cash so she can afford to sleep in a hotel for the night, get a meal, and maybe stock up on diapers, formula, and water.
- Mary is greeted by the receptionist, who listens to Mary’s story.
- Mary tells her that she is used to not having much and that she is pretty sure that if she can find a job quickly, she’ll be able to save up enough money to get an apartment and asks about some extra cash for the hotel room.
- Anywhere Rescue Mission is a participating agency in Coordinated Entry as a Referral Partner. It has one floor that is an emergency shelter for individual adults; its second floor has 4 efficiency apartments that are used for Rapid Re-housing. It currently has a cot available in the emergency shelter but it has a room available on the second floor, one of which is outfitted with two beds that would be suitable for Mary and Caleb.

Based on Section 3.1 (Screening and Assessment) Policies and Procedures, what are the activities/steps the Mission’s CE Screener should do?

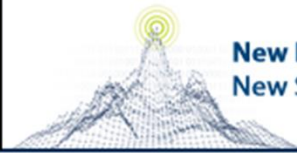
Based on Section 3.1 and Section 4, What happens with Mary and Caleb?



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Policy and Procedure Analysis: This Situation

- Section 3.1: What should the intake worker should do? (Referral Partner)
 - Complete the Housing Crisis Referral Form for households identified as experiencing homelessness or at-risk of experiencing homelessness.
 - All individuals and families experiencing or at risk of homelessness and served by a Referral Partner must be offered the opportunity to participate in Coordinated Entry.
 - Submit the Housing Crisis Referral Form to the local Lead Agency within **one** business day.
- Section 4: What happens to Mary and Caleb?
 - Mary and Caleb cannot go into the Rescue Mission's emergency shelter, as it is only for individuals



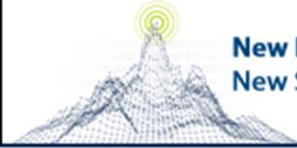
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Policy and Procedure Analysis: Clarity

- Section 3.1: What should the intake worker should do? (Referral Partner)
 - Complete the Housing Crisis Referral Form for households identified as experiencing homelessness or at-risk of experiencing homelessness.
 - All individuals and families experiencing or at risk of homelessness and served by a Referral Partner must be offered the opportunity to participate in Coordinated Entry.
 - Submit the Housing Crisis Referral Form to the local Lead Agency within one business day.

DO YOU UNDERSTAND THE ROLE OF THE REFERRAL PARTNER BASED ON WHAT IS WRITTEN IN THE P&P? WHY DO YOU NEED TO UNDERSTAND THIS?

WHAT DO YOU NEED TO UNDERSTAND THE ROLE OF THE REFERRAL, ASSESSMENT, AND LEAD AGENCY PARTNERS?



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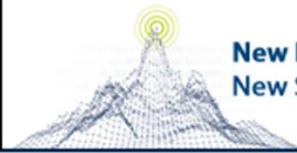
Policy and Procedure Analysis: What Happens to Mary and Caleb?

- **Section 4: What happens to Mary and Caleb?**

- Mary and Caleb cannot go into the Rescue Mission's emergency shelter, as it is only for individuals

WHY IS IT SIGNIFICANT THAT THE RESCUE MISSION IS A REFERRAL PARTNER?

HOW DOES A LIMITED ROLE OF A PROVIDER IMPACT THE CLIENT?



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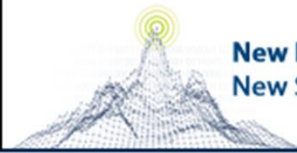
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Scenario: Assessment

- The Anywhere Rescue Mission completes the Housing Crisis Referral Form and submits it to the local Lead Agency within the hour.
- The Rescue Mission also calls a local family shelter and discovers that there is a bedroom available where they could accommodate Mary and Caleb. They give Mary the address and tell her to go there immediately.
- A Way Home is one of several family shelters in Anywhere. They specialize in services for single mothers with young children. When Mary arrives, she is greeted by the receptionist, who listens to Mary's story. The receptionist finds the intake worker, who leads Mary into a private area and asks her to tell her what was going on, where did she just come from, and about what Mary needs.
- A Way Home is an Assessment Provider but is not the local Lead Agency. The intake worker tells Mary that she needs to ask her some questions but that they have a bedroom where she and Caleb can stay. She also tells her about a program called "Coordinated Entry" and asks if she has time to complete the assessment process with her now. Mary asks if it will help her find a job and a place to live and the intake worker says "yes", so Mary agrees. When they first start, Mary is comfortable with the information the intake worker is asking for, but as the interview continues, she starts to get nervous about all the questions, especially the ones about domestic violence, mental health, and criminal history. Mary hasn't had any issues with these things but they make her feel uncomfortable and she starts to worry about the other people staying at A Way Home.
- Mary tells the intake worker that the Anywhere Rescue Mission said they had a small efficiency apartment available and asks if she can just stay there for a few days.

Based on Section 3 Policies and Procedures, what are the activities/steps the Mission's CE Screener should take?

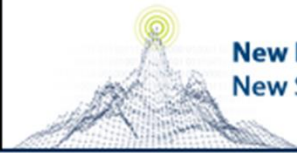
What happens with Mary and Caleb?



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Policy and Procedure Analysis: This Situation

- Section 3: What should the intake worker should do? (Assessment Partner)
 - Complete the Housing Assessment within 3 days.
- Section 4: What happens to Mary and Caleb?
 - Mary and Caleb can stay at A Way Home for an undetermined amount of time.



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Policy and Procedure Analysis: Clarity

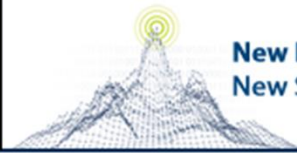
- Section 3: What should the intake worker should do?
(Assessment Partner)
 - Complete the Housing Assessment within 3 days.

DO YOU UNDERSTAND THE ROLE OF THE ASSESSMENT PARTNER BASED ON WHAT IS WRITTEN IN THE P&P?

HOW DOES MARY GET ON THE MASTER LIST?

WHAT SHOULD MARY BE TOLD?

UNDER 3.7 WHAT RIGHTS DOES MARY HAVE RELATED TO THE PROVISION OF INFORMATION TO THE COC?

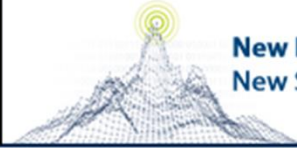


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Takeaways

- Policies and procedures provide a roadmap for day-to-day operations.
- Policies guide the work, procedures say how it will be done.
- Policies should be accompanied by clear, precise directions about how to do something (procedures) that ensures the policy is met.
- Policies and procedures may sound good on paper, but sometimes do not translate well to the frontline work.
- Policies and procedures should be examined from the experience of the client to ensure that policies and procedures do not negatively impact the client.



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Questions?

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