

# Core Operational Functions for Coordinated Entry Management Entities

## Overview

The key coordinated entry (CE) system management functions below are categorized as required or not required. Where relevant, citations for HUD's requirement that certain functions be part of that CE system are also noted.

Required activities to be prioritized for initial implementation are denoted as: "**Required\***."

## Links to Cited Documents:

HUD's four core documents detailing CE requirements and recommendations include:

- [CE Notice](#)
- [CE Management and Data Guide](#)
- [CE Core Elements Guidebook](#)
- [CE Self-Assessment](#)

## CE Management Functions

The core CE management functions are divided into tables using the following categories:

- [CE System Management](#)
- [Access](#)
- [Assessment](#)
- [Prioritization](#)
- [Referral, Matching, & Placement](#)
- [Data Management](#)
- [CE Monitoring & Evaluation](#)

## CE SYSTEM MANAGEMENT

| CE System Management Functions  | WHO?   | Required or Not Required?   | Source for Required Functions                                     |
|---|--|---|---|
| <ul style="list-style-type: none"> <li>• <b>Support existing partnerships and cultivate new partnerships with ESG and CoC recipients, as well as other system partners and resources.</b> <ul style="list-style-type: none"> <li>○ Ensure all CE-participating agencies have agreed to and signed any MOUs required for data sharing</li> <li>○ Ensure all CE-participating agencies agree upon and use the same data disclosure agreements with clients to support their data entry into HMIS and cross-agency case conferencing</li> <li>○ Identify partners who should be part of specific committees, case conferencing processes</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>• <b>HCD/HMIS Lead, EOH/HMIS Oversight, HCSA/Contract Manager, Zone Coordinators</b></li> </ul>   | <p><b>Required</b></p>  | <p>CE Notice, p. 17</p> <p>CE Management and Data Guide, p.10</p> |
| <ul style="list-style-type: none"> <li>• <b>Facilitate CE-related working groups, committees, and forums to coordinate and standardize referrals and monitor and review the coordinated entry process.</b> <ul style="list-style-type: none"> <li>○ Convene assessors to ensure assessment processes are consistent, to identify gaps or areas for improvement in the assessment process, and to coordinate referrals.</li> <li>○ Convene CE committee or other project management body comprised of agency supervisors and managers to discuss operations, system-level performance, and monitoring.</li> <li>○ Convene other groups as necessary based on system flow challenges or other CE process barriers. For example, if CE system performance data indicate long wait times from match to lease-up, or if a significant number of permanent housing resources are being underutilized or filled outside of the CE referral process, convene the relevant housing providers, housing navigators, and matchers to identify what is causing the issue at hand and strategize improving it for everyone involved.</li> <li>○ Establish a transparent and consistent way to document, disseminate information about, and archive all of these activities. This should include keeping meeting minutes somewhere accessible to all relevant entities while ensuring client privacy (e.g., with case conferencing updates), ensuring accountability for those charged with follow-up tasks, notifying relevant stakeholders of upcoming meetings or posted meeting minutes, and publicly posting updated policies.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Zone Coordinators, Gap at System-level</b> <ul style="list-style-type: none"> <li>○ Zone Coordinators, EOH</li> <li>○ Zone Coordinators, Gap at System-level</li> <li>○ Zone Coordinators, Gap at System-level</li> </ul> </li> <li>○ Gaps at all levels: Limited info shared/stored in HMIS, Zone Ops Meetings, HCSA Sharefile, EOH Website, HCD/HMIS Website, 211</li> </ul> | <p><b>Required*</b><br/><i>(part of establishing standard CE participation protocols)</i></p> | <p>CE Management and Data Guide, p. 5</p>                         |

| CE System Management Functions   | WHO?   | Required or Not Required?  | Source for Required Functions                                     |
|--|--|----------------------------|---|
| <ul style="list-style-type: none"> <li>• <b>Develop and administer a grievance and appeal policy for all grievances not resolved at the provider level.</b> <ul style="list-style-type: none"> <li>○ <b>Design a grievance process consistent with CoC’s CE grievance policy.</b> <ul style="list-style-type: none"> <li>▪ Strategize and publicize to all stakeholders a process to administer a grievance and appeal process for all grievances unable to be resolved at the provider level.</li> <li>▪ Seek feedback from CE-participating agencies, relevant CoC committees, advisory boards, etc.</li> <li>▪ Continue to iterate and publicize the policy drafting and feedback process until relevant stakeholders reach consensus, as defined by CoC’s policy-making procedures and governance structure.</li> </ul> </li> <li>○ <b>Administer grievance policy.</b> <ul style="list-style-type: none"> <li>▪ Ensure all CE-participating entities are trained on the system-level grievance policy and procedures, including: what types of incidents, how, and to whom or to what entity to report grievances. Continue to provide support and training to existing and new staff on how to implement this policy.</li> <li>▪ Ensure all means of reporting grievances or appealing agency-level decisions are communicated to all clients at the time of initial screening. Ensure all grievance policy forms and means of reporting are accessible to and usable by clients, regardless of native language, etc.</li> <li>▪ Set and communicate a timeline within which all grievances will be addressed.</li> <li>▪ Follow set policy and protocol to address grievances.</li> </ul> </li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap at System-level</b> <ul style="list-style-type: none"> <li>○ <b>Gap at System-level</b></li> <li>○ <b>Gap at System-level</b></li> </ul> </li> </ul> | <p><b>Required*</b></p>    | <p>CE Notice, p. 11</p> <p>CE Management and Data Guide, p. 9</p> |
| <ul style="list-style-type: none"> <li>• <b>Document costs of operating CE and identifying eligible funding opportunities for those costs.</b> <ul style="list-style-type: none"> <li>○ Identify potential funding sources from Federal partner agencies (HUD, VA, HHS) and other state and local sources.</li> <li>○ Identify associated CE costs for training and evaluation.</li> </ul> </li> </ul>   | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ EOH/SCC</li> </ul> </li> </ul>   | <p><b>Not Required</b></p> | <p>CE Management and Data Guide, p. 10</p>                        |

| CE System Management Functions  | WHO?   | Required or Not Required?      | Source for Required Functions              |
|---|--|--------------------------------|--|
| <ul style="list-style-type: none"> <li>• <b>Monitor coordinated entry requirements from funders.</b> <ul style="list-style-type: none"> <li>○ Identify which funders (Federal, state, local) require CE participation for their grant recipients.</li> <li>○ Incorporate funder requirements into a CE Participation Agreement all participating providers/agencies execute with the CE Management Entity.</li> </ul> </li> </ul>   | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ Gap</li> </ul> </li> </ul>   | <p><b><u>Required*</u></b></p> | <p>CE Management and Data Guide, p. 10</p> |
| <ul style="list-style-type: none"> <li>• <b>Coordinate with the CoC committee or other entity responsible for updating or developing new policies and procedures to ensure that CE policies and procedures support and do not impose undue barriers to staff implementing CE on the ground.</b> <ul style="list-style-type: none"> <li>○ Identify gaps in expectations expressed in written policies and procedures and what staff report experiencing on the ground.</li> <li>○ Convene staff at all levels to troubleshoot and amend policies and procedures to ensure they accomplish the intended outcomes of CE.</li> <li>○ Establish and administer annual review processes for all CE policies and procedures</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Zone Coordinators, HCSA/Contract Managers, Funders, HCD/HMIS Lead</b> <ul style="list-style-type: none"> <li>○ SCC</li> <li>○ Zone Coordinators, Gap at System-level</li> <li>○ Gap</li> </ul> </li> </ul> | <p><b>Required</b></p>         | <p>CE Self-Assessment, p. 24</p>           |

| CE System Management Functions   | WHO?   | Required or Not Required?  | Source for Required Functions                 |
|--|--|----------------------------|---|
| <ul style="list-style-type: none"> <li>• <b>Establish a clear, accessible communication plan with specific coordination methods for each part of the CE process.</b> <ul style="list-style-type: none"> <li>○ Develop and administer a website to host public-facing documents, which may include: forms, policies and procedures, news, training resources, and a calendar of events. It may also include a secure login feature for common access to more private information.</li> <li>○ Identify points of contact for CE questions and information for the CE system as a whole and, if applicable, at individual agencies.</li> <li>○ Establish procedures for communicating about clients (including the priority list and case conferencing lists) in a way that protects their data.</li> <li>○ Develop policies and oversee methods for development and distribution of prioritization lists, active lists, and project-level waiting lists, if applicable.</li> <li>○ Develop policy and administer process for purging names from priority lists and/or active lists when participants are housed or no longer available for referral and matching.</li> <li>○ Develop policies and oversee methods for communicating about housing resource vacancies and referral or matching of clients to those vacancies</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gaps at all levels: Limited info shared/stored in HMIS, Zone Ops Meetings, HCSA Sharefile, EOH Website, HCD/HMIS Website, 211</li> <li>○ Gap</li> <li>○ Zone Coordinators, Gap at System-level</li> <li>○ Gap</li> <li>○ Gap</li> <li>○ Zone Coordinators, Gap at System Level</li> </ul> </li> </ul> | <p><b>Required*</b></p>    | <p>CE Management and Data Guide, pp. 9-10</p> |
| <ul style="list-style-type: none"> <li>• <b>Administer annual trainings on:</b> <ul style="list-style-type: none"> <li>○ System-wide problem solving</li> <li>○ Progressive engagement/assistance</li> <li>○ Dynamic system management</li> <li>○ For PSH/RRH providers: inventory management in HMIS</li> <li>○ Programmatic or service strategy approaches – critical time intervention, housing first, harm reduction, motivational interviewing, etc.</li> <li>○ Landlord recruitment, engagement, retention</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ Gap</li> <li>○ Gap</li> <li>○ Gap</li> <li>○ Service providers, HCSA/AC3</li> <li>○ Service providers</li> </ul> </li> </ul>   | <p><b>Not Required</b></p> |   |

| CE System Management Functions   | WHO?  | Required or Not Required?  | Source for Required Functions |
|--|---|--|-------------------------------|
| <ul style="list-style-type: none"> <li>• <b>Ensure CE consistency across CoC Zone Structure</b> <ul style="list-style-type: none"> <li>○ Identify any localized CE staffing functions (i.e. management or coordination, inventory management, referral and resource matching, etc.) that must be administered at the local (zone) level</li> <li>○ Identify any discrepancies or gaps in the operation of CE operations across each zone</li> <li>○ Facilitate coordination/management meetings among zone CE staff</li> <li>○ Ensure consistency in CE operations across all zones</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Zone Coordinators</li> <li>○ Gap</li> <li>○ Gap (Used to be ILC-Ops)</li> <li>○ Gap</li> </ul> </li> </ul> | <p><b>Required*</b><br/>if CoC has included CE Zones in their design</p> | <p>CE Notice, p. 7</p>        |

## ACCESS

| Access Functions   | WHO?   | Required or Not Required?  | Source for Required Functions             |
|--|--|--|---|
| <ul style="list-style-type: none"> <li>• <b>Develop and deploy a marketing strategy that clearly and transparently shows how and where people can access the CE system</b> <ul style="list-style-type: none"> <li>○ Develop and implement marketing strategies targeted toward specific subpopulations (e.g., people fleeing domestic violence, youth, etc.). These may include flyers posted in service agencies or online, social media ad campaigns, PSAs run through traditional media outlets, etc.</li> <li>○ Assess how well marketing strategy reaches targeted subpopulations. Identify ways to better reach subpopulations or specific parts of the community that are not being reached.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>EOH, Zones, 211</b> <ul style="list-style-type: none"> <li>○ Gap: EOH developed CE flyer</li> <li>○ Gap</li> </ul> </li> </ul> | <p><b>Required*</b></p>  | <p>CE Notice, p. 11</p>                   |
| <ul style="list-style-type: none"> <li>• <b>Manage all PR requests related to CE</b> <ul style="list-style-type: none"> <li>○ Establish a mechanism for community members to reach the CE system</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Gap</b></li> </ul>   | <p><b>Not Required</b></p>   |   |
| <ul style="list-style-type: none"> <li>• <b>Support implementation of system-wide problem solving/diversion strategy</b> <ul style="list-style-type: none"> <li>○ Establish protocols for system-wide diversion/problem solving conversations</li> <li>○ Ensure all access points and access centers follow problem solving protocols that focus on reducing inflow with exploration of safe, alternative housing options for all participants.</li> </ul> </li> </ul>   | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ SCC</li> <li>○ Gap</li> </ul> </li> </ul>                                     | <p><b>Required if included in CE design (part of establishing standard CE participation protocols)</b></p> | <p>CE Management and Data Guide, p. 5</p> |

| Access Functions   | WHO?  | Required or Not Required?  | Source for Required Functions   |
|--|---|--|---|
| <ul style="list-style-type: none"> <li>• <b>Develop and deliver trainings at least annually on:</b> <ul style="list-style-type: none"> <li>○ Diversion &amp; problem-solving to all access point staff</li> <li>○ CE policies and procedures, including those that differ for specific subpopulations</li> </ul> </li> </ul>   | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ Gap</li> </ul> </li> </ul>      | <p><b>Required after updates to policies and procedures following annual CE evaluation</b></p> | <p>CE Management and Data Guide, p. 5</p>                               |
| <ul style="list-style-type: none"> <li>• <b>Manage strategies to monitor and reduce system inflow</b> <ul style="list-style-type: none"> <li>○ Monitor rates of regular (weekly, monthly or quarterly) inflow of new and returning clients</li> <li>○ Identify and engage systems who may have most frequent and sustained contact with CE participants immediately preceding literal homelessness (schools, hospitals, jails, County social service departments, nonprofit service organizations) and explore opportunities for reducing inflow into homelessness.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ Gap</li> </ul> </li> </ul>      | <p><b>Not Required</b></p>   |   |
| <ul style="list-style-type: none"> <li>• <b>Manage transition/transfer protocols for different subpopulations within Access points</b> <ul style="list-style-type: none"> <li>○ Streamline transfers among separate CE systems (i.e. youth and adult, single adult and family, family and DV, prevention and literal homelessness)</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Zone Coordinators, HRCs</b> <ul style="list-style-type: none"> <li>○ Gap</li> </ul> </li> </ul> | <p><b><u>Required*</u></b></p>   | <p>CE Notice, pp. 6-7 &amp; 9</p> <p>CE Self-Assessment, p. 3 and 6</p> |

## ASSESSMENT

| Assessment Functions   | WHO?  | Required or Not Required?      | Source for Required Functions                                       |
|--|---|--------------------------------|---|
| <ul style="list-style-type: none"> <li>• <b>Standardize screening and assessment processes</b> <ul style="list-style-type: none"> <li>○ Create and disseminate standardized forms for each phase of screening and assessment.</li> <li>○ Establish policies and procedures that specify timeframes and processes for entering screening and assessment data into HMIS.</li> <li>○ Work with DV providers to establish processes for those fleeing DV to be assessed using the standard CE assessment tool and included in the priority list, if they wish to be considered for non-DV-specific housing resources.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ EOH</li> <li>○ HMIS Oversight, HCSA/Contract Manager</li> <li>○ Gap</li> </ul> </li> </ul> | <p><b><u>Required*</u></b></p> | <p>CE Notice, p.7-11</p> <p>CE Management and Data Guide, p. 10</p> |

| Assessment Functions   | WHO?   | Required or Not Required?                           | Source for Required Functions                             |
|--|--|---|---|
| <ul style="list-style-type: none"> <li>• <b>Develop and deliver trainings to assessment staff at least annually on:</b> <ul style="list-style-type: none"> <li>○ Assessment tools: what they are, how and when they fit into the CE process, and how to administer them</li> <li>○ CE policies and procedures, including those that differ for specific subpopulations</li> <li>○ Assessment data entry into HMIS</li> <li>○ Phased assessment</li> <li>○ Progressive engagement</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ EOH</li> <li>○ Gap</li> <li>○ Gap</li> <li>○ Gap</li> <li>○ Gap</li> </ul> </li> </ul>  | <b>Required*</b>                                    | CE Notice, p.14<br><br>CE Management and Data Guide, p.11 |
| <ul style="list-style-type: none"> <li>• <b>Refine Assessment process</b> <ul style="list-style-type: none"> <li>○ Identify which assessment questions and responses will be used to establish prioritization results/scores. <ul style="list-style-type: none"> <li>▪ Identify which of those questions and responses will be built into HMIS as standard elements</li> <li>▪ Identify which response categories will be scored or compiled to generate a prioritization result/score</li> </ul> </li> <li>○ Solicit input/feedback from providers and participants about how questions are asked and how responses are understood, documented and used to support prioritization results/scores. Identify opportunities for continuous quality improvement.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>EOH</b> <ul style="list-style-type: none"> <li>○ EOH/Tools Committee <ul style="list-style-type: none"> <li>▪ EOH, HMIS Oversight</li> <li>▪ EOH</li> </ul> </li> <li>○ Gap</li> </ul> </li> </ul> | <b>Required as a result of annual CE evaluation</b> | CE Notice, p. 15<br><br>CE Self-Assessment, p. 24         |

## PRIORITIZATION

| Prioritization Functions  | WHO?  | Required or Not Required? | Source for Required Functions                    |
|---|---|---------------------------|--|
| <ul style="list-style-type: none"> <li>• <b>Identify which CoC resources will not be prioritized such as those providing emergency access on an immediate, walk-in basis (e.g. outreach services, emergency shelter, safe haven, winter shelter, etc.)</b></li> </ul> | <ul style="list-style-type: none"> <li>• <b>EOH/SCC, Zone Coordinators</b></li> </ul> | <b>Required*</b>          | CE Notice, p. 12<br><br>CE Self-Assessment, p. 6 |



| Prioritization Functions  | WHO?   | Required or Not Required?      | Source for Required Functions   |
|---|--|--------------------------------|---|
| <ul style="list-style-type: none"> <li>• <b>Manage the centralized priority list for housing resources for all populations</b> <ul style="list-style-type: none"> <li>○ Generate and update the priority lists on a set schedule, as established by written policies and procedures. There is a single countywide list, but each zone filters by their zone. Vets have a report built into the HMIS that includes additional useful fields for matching.</li> <li>○ Communicate the priority lists out to relevant CE staff, including matchers, housing navigators, and others involved in case conferencing on a set schedule.</li> <li>○ Monitor changes to the priority list from week to week to ensure no one prioritized for assistance is being consistently passed over by the matching process.</li> <li>○ Establish a prioritization process that is sized to available resources. <ul style="list-style-type: none"> <li>▪ Highest priority populations should be matched to crisis and/or PH resources within a target time period (e.g. within 60 days)</li> </ul> </li> <li>○ Maintain an active prioritization list, and ensure that those responsible for matching clients to housing resources have real-time access to that list.</li> <li>○ Establish and enforce a formal policy for prioritization “tie breakers” that take into account multiple factors and are considered when identifying the most vulnerable household to match to housing resources when they become available.</li> <li>○ Establish policies around client record deactivation, reactivation, and deletion. Deactivate, reactivate, and delete client records as dictated by this policy.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap at System-level, Zone Coordinators</b> <ul style="list-style-type: none"> <li>○ Zone Coordinators, EOH</li> <br/> <li>○ Zone Coordinators</li> <br/> <li>○ Zone Coordinators</li> <br/> <li>○ Gap <ul style="list-style-type: none"> <li>▪ Gap</li> </ul> </li> <br/> <li>○ Zone Coordinators</li> <br/> <li>○ SCC sets policy, Gap in operationalizing</li> <br/> <li>○ SCC sets policy, Gap in operationalizing, Gap in policy for record deletion or purging</li> </ul> </li> </ul> | <p><b><u>Required*</u></b></p> | <p>CE Notice, pp.9-11</p> <p>CE Management and Data Guide, p. 25</p> <p>CE Self-Assessment, p. 17</p> |

| Prioritization Functions  | WHO?  | Required or Not Required? | Source for Required Functions          |
|---|---|---------------------------|--|
| <ul style="list-style-type: none"> <li>● <b>Manage and facilitate the case conferencing process</b> <ul style="list-style-type: none"> <li>○ Convene matchers, housing navigators/others providing outreach or supportive services to people awaiting housing resources in regular (i.e. weekly) case conferencing calls or meetings. These will likely be different meetings for youth and young adults, single adults, and families.</li> <li>○ Attend and facilitate case conferencing meetings or establish process to oversee case conferencing to ensure consistency.</li> <li>○ Disseminate necessary information before/after meetings to all relevant parties.</li> <li>○ Ensure accountability between case conferencing meetings for those with follow-up tasks to support clients discussed during case conferencing</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>● <b>Manage and facilitate the case conferencing process</b> <ul style="list-style-type: none"> <li>○ Zone Coordinators</li> <br/> <li>○ HCSA/Contract Manager, EOH</li> <li>○ Zone Coordinators</li> <br/> <li>○ Zone Coordinators</li> </ul> </li> </ul> | <b>Not Required</b>       | CE Management and Data Guide, pp. 5, 9 |
| <ul style="list-style-type: none"> <li>● <b>Develop and deliver trainings at least annually on:</b> <ul style="list-style-type: none"> <li>○ Prioritization process, policies, and procedures</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>● <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> </ul> </li> </ul>   | <b>Required</b>           | CE Notice, p. 14                       |

## REFERRAL, MATCHING, & PLACEMENT

| Referral, Matching, & Placement Functions  | WHO?  | Required or Not Required? | Source for Required Functions                    |
|--|---|---------------------------|--|
| <ul style="list-style-type: none"> <li>● <b>Manage the referral / matching / placement process</b> <ul style="list-style-type: none"> <li>○ Establish policies and procedures for CE referral destination projects to notify the CE system of upcoming or current enrollment vacancies.</li> <li>○ Establish policies and procedures for how clients will be matched with housing resources.</li> <li>○ Ensure that staff responsible for matching clients to housing resources have real-time access to an active priority list.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>● <b>Zone Coordinators</b> <ul style="list-style-type: none"> <li>○ Zone Coordinators, Gap at System-level</li> <br/> <li>○ SCC sets policy, gap in monitoring operations</li> <li>○ Zone Coordinators, HMIS Lead</li> </ul> </li> </ul> | <b>Required*</b>          | CE Notice, p. 9-11<br><br>Self-Assessment, p. 19 |

| Referral, Matching, & Placement Functions   | WHO?   | Required or Not Required?  | Source for Required Functions  |
|---|--|----------------------------|--|
| <ul style="list-style-type: none"> <li>● <b>Provide oversight on unsuccessful matches to housing resources.</b> <ul style="list-style-type: none"> <li>○ Establish policies and procedures for housing projects to document and report back to the management entity on their rejections of clients. Review these at least weekly to ensure housing providers are not violating Housing First principles and are only rejecting clients based on funder-determined eligibility requirements. Use feedback on client rejections to Identify ways to ensure clients are only matched with resources for which they are eligible.</li> <li>○ Establish policies and procedures for matchers to document and report back on clients’ refusals to accept housing resources with which they were matched. Review these at least weekly to identify any barriers that could be addressed.</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>● <b>Zone Coordinators, Gap at System-level</b> <ul style="list-style-type: none"> <li>○ Gap</li> </ul> </li> <br/> <li>○ Gap</li> </ul>  | <p><b>Required</b></p>     | <p>CE Management and Data Guide, p. 25 and 30</p> <p>CE Notice, pp. 12-13 and 16</p> |
| <ul style="list-style-type: none"> <li>● <b>Support housing resource referral destinations participating in CE, and cultivate buy-in from those not required to participate in CE.</b> <ul style="list-style-type: none"> <li>○ Ensure matching processes are clear and transparent to housing resource providers</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>● <b>Funders, Zone Coordinators, Gap at System-level</b> <ul style="list-style-type: none"> <li>○ Gap</li> </ul> </li> </ul>  | <p><b>Not Required</b></p> |  |
| <ul style="list-style-type: none"> <li>● <b>Develop and deliver trainings at least annually on:</b> <ul style="list-style-type: none"> <li>○ Housing navigation</li> <li>○ Housing retention</li> <li>○ Landlord recruitment, engagement and retention</li> </ul> </li> </ul>   | <ul style="list-style-type: none"> <li>● <b>Zone Coordinators, Funders, Gap at System-level</b> <ul style="list-style-type: none"> <li>○ Service providers, HCSA, Zone Coordinators</li> <li>○ Service providers</li> <li>○ Service providers</li> </ul> </li> </ul> | <p><b>Not Required</b></p> |  |

## Data Management

| Data Management Functions   | WHO?   | Required or Not Required?  | Source for Required Functions                |
|---|--|--|--|
| <ul style="list-style-type: none"> <li>• <b>Coordinate CE data collection, management and reporting with HMIS lead and HMIS software provider</b> <ul style="list-style-type: none"> <li>○ Identify data necessary for CE management and monitoring. Examples include:               <ul style="list-style-type: none"> <li>▪ CE inflow (newly homeless and returns)</li> <li>▪ Length of time from contact to engagement, to assessment, to prioritization, to referral, to match, to lease up/PH exit</li> <li>▪ PH placement rate (RRH, PSH, other PH)</li> <li>▪ Demographics and other attributes of CE participants by outcome</li> </ul> </li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap at System-Level: Pieces being worked on by EOH/HMIS Oversight, HCD HMIS Lead</b> <ul style="list-style-type: none"> <li>○ Gap               <ul style="list-style-type: none"> <li>▪ Gap</li> <li>▪ Gap</li> <li>▪ Gap</li> <li>▪ Gap</li> </ul> </li> </ul> </li> </ul> | <p><b>Required*</b></p>  | <p>CE Management and Data Guide, pp. 6-7</p> |
| <ul style="list-style-type: none"> <li>• <b>Manage trainings on topics such as:</b> <ul style="list-style-type: none"> <li>○ CE data capture requirements</li> <li>○ Data quality</li> </ul> </li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ Gap</li> </ul> </li> </ul>   | <p><b>Not Required</b><br/><i>(recommended as part of HMIS or CE data system management)</i></p> |  |

## CE MONITORING & EVALUATION<sup>1</sup>

| CE Monitoring & Evaluation Functions  | WHO?   | Required or Not Required? | Source for Required Functions             |
|---|--|---------------------------|---|
| <ul style="list-style-type: none"> <li>• <b>Establish and operationalize a continuous quality improvement (CQI) process</b> <ul style="list-style-type: none"> <li>○ Use HMIS and other CE system monitoring data</li> <li>○ Seek feedback from people with lived experience to improve system processes</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap</b> <ul style="list-style-type: none"> <li>○ Gap</li> <li>○ Gap</li> </ul> </li> </ul> | <p><b>Required*</b></p>   | <p>CE Management and Data Guide, p.29</p> |

<sup>1</sup> Evaluation is usually part of the CE Evaluation Entity's function, not the CE management Entity's.

| CE Monitoring & Evaluation Functions   | WHO?  | Required or Not Required?  | Source for Required Functions  |
|--|---|--|--|
| <ul style="list-style-type: none"> <li>• <b>Establish and implement a method to monitor key CE system performance outcomes</b></li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Gap</b></li> </ul>  | <p><b>Required*</b></p>  | <p>CE Management and Data Guide, p. 11 &amp; 27</p> <p>CE Self-Assessment, p. 24</p> |
| <ul style="list-style-type: none"> <li>• <b>Provide CE system monitoring report updates to relevant CoC committees and System Coordination Committee on a regular (i.e. quarterly) basis</b></li> </ul>  | <ul style="list-style-type: none"> <li>• <b>Gap</b></li> </ul>  | <p><b>Not Required</b></p>   | <p>CE Management and Data Guide, p. 27</p> <p>CE Notice, p. 15</p>                   |
| <ul style="list-style-type: none"> <li>• <b>Manage annually a full evaluation of the CE system<sup>2</sup></b> <ul style="list-style-type: none"> <li>○ Wait times for initial contact</li> <li>○ Extent to which expected timelines are met</li> <li>○ Number/percentage of referrals that are accepted by receiving programs</li> <li>○ Rate of missed appointments for scheduled assessments</li> <li>○ Number/percentage of persons declined by more than one (1) provider</li> <li>○ Number/percentage of Eligibility and Referral Decision appeals and/or grievances</li> <li>○ Number of program intakes <b>not</b> conducted through CE system</li> <li>○ Completeness of data on assessment and intake forms</li> <li>○ Households referred have length of stays consistent with system guidelines</li> <li>○ Waiting lists are reduced for all services</li> <li>○ Program components meet outcome targets</li> <li>○ Reductions in long term chronic homelessness</li> <li>○ Reductions in family homelessness</li> <li>○ Reductions in returns to homelessness</li> <li>○ Reduced rate of households becoming homeless for the first time</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• <b>Gap: Limited evaluation being conducted by EOH</b></li> </ul> | <p><b>Required<sup>2</sup> to have an evaluation process</b></p> <p><b>Recommended that the evaluation process consider these elements</b></p> | <p>CE Management and Data Guide, pp. 27-32</p>                                       |

<sup>2</sup> Evaluation is usually part of the CE Evaluation Entity's function, not the CE Management Entity's.

**Oakland-Berkeley-Alameda County CoC  
Coordinated Entry Dashboard**

Report can be filtered by: zone, homeless location (sheltered/unsheltered), subpopulations (Veteran, young adult (18-24), seniors (age?))

|   | Family  |          | Adults Only |          | Child Only |          |
|---|---------|----------|-------------|----------|------------|----------|
|   | # of HH | # of ppl | # of HH     | # of ppl | # of HH    | # of ppl |
| Number active in CE project as of report date |         |          |             |          |            |          |

|   | Family HH | Adult Only HH | Child Only HH |
|---|-----------|---------------|---------------|
| Number of HH active in CE project that have been assessed                                     |           |               |               |
| Percent of HH active in CE project that have been assessed                                    |           |               |               |
| Number of HH active in CE project that have been referred to a crisis project                 |           |               |               |
| Percent of HH active in CE project that have been referred to a crisis project                |           |               |               |
| Number of HH active in CE project that have been referred to a permanent housing destination  |           |               |               |
| Percent of HH active in CE project that have been referred to a permanent housing destination |           |               |               |
| Number of HH that exited CE project to a non-permanent destination                            |           |               |               |
| Percent of HH that exited CE project to a non-permanent destination                           |           |               |               |







**Oakland-Berkeley-Alameda County CoC  
Coordinated Entry - Other Outcomes**

Report can be filtered by: zone, homeless location (sheltered/unsheltered), subpopulations (Veteran, young adult (18-24), seniors (age?))

**PROBLEM-SOLVING**

|  | <b>Family HH</b> | <b>Adult Only HH</b> | <b>Child Only HH</b> |
|--|------------------|----------------------|----------------------|
| Number of HH referred to problem-solving   |                  |                      |                      |
| Percent of HH referred to problem-solving who had the problem-solving conversation |                  |                      |                      |
| Number of HH that were able to find housing or rehousing in a safe alternative     |                  |                      |                      |
| Percent of HH referred to problem-solving that were diverted                       |                  |                      |                      |

**SAFETY SCREENING**

|  | <b>Family HH</b> | <b>Adult Only HH</b> | <b>Child Only HH</b> |
|--|------------------|----------------------|----------------------|
| Number of HH that received a safety screening  |                  |                      |                      |
| Percent of all HH active in CE project that received the safety screening            |                  |                      |                      |
| Number of HH that were determined to need a referral to DV or other safety resources |                  |                      |                      |

**Oakland-Berkeley-Alameda County CoC  
By-Name List**

Report can be filtered by: zone, homeless location (sheltered/unsheltered), subpopulations (Veteran, young adult (18-24), seniors (age?))

| Column | BNL Field Header                  | Data Point             |
|--------|-----------------------------------|------------------------|
| B      | Assessment Status                 | Active/Inactive/Housed |
| C      | Zone Assignment                   |                        |
| D      | In what part of the bay or city?  | Home city              |
| E      | Assessor Name                     |                        |
| F      | Assessment Type                   | in person, phone, etc  |
| G      | Last Assess Provider              |                        |
| H      | Original Assessment Date          |                        |
| I      | Client ID                         |                        |
| J      | Client Last Name                  |                        |
| K      | Client First Name                 |                        |
| L      | Client date added                 | to the HMIS            |
| M      | Gender                            |                        |
| N      | DOB                               |                        |
| O      | Race                              |                        |
| P      | Ethnicity                         |                        |
| Q      | Client's Current Age              |                        |
| R      | Veteran                           |                        |
| S      | Veteran's Discharge Status        |                        |
| T      | Alameda Presumed CH at Assessment |                        |
| U      | Number of Household Members       |                        |
| V      | Physical disability               |                        |
| W      | Chronic Health                    |                        |
| X      | Mental Health                     |                        |
| Y      | Alcohol                           |                        |
| Z      | Drug                              |                        |
| AA     | Alcohol and Drug                  |                        |
| AB     | Developmental                     |                        |
| AC     | HIV/AIDS                          |                        |
| AD     | Most Recent Program Enrollment    |                        |
| AE     | Program Enrollment Type           |                        |
| AF     | Housing Move In Date              |                        |
| AG     | Last Assessment User Modifying    |                        |
| AH     | First Assessment User Creating    |                        |
| AI     | Number of Minor Children          |                        |
| AJ     | Total Score                       |                        |