

September 4, 2020

To: Members of the System Coordination Committee (SCC)

From: Coordinated Entry Working Group

Subject: Update and Final Report from Coordinated Entry Working Group

This is the final report of the Coordinated Entry (CE) Working Group. This report is informational and does not require action by the SCC. This report covers three areas discussed by the work group:

1. Training and messaging approach for new process steps
2. Transition Plan and timeline for implementation
3. Additional issues raised in the process not under the workgroup's purview being referred back to the SCC for future action

### Background

The CE Working Group began meeting in June, building on the work of previous groups including the Phase 1 group, HMIS Oversight, HPS policy group and ad-hoc Triage work group, to establish a revised CE process and plan to update the work flow in HMIS to meet HUD CE requirements. The group included representatives from nonprofits, city and county government, Everyone Home, and BitFocus<sup>1</sup>. Participants were invited based on their prior involvement in related working groups and their current and future leadership roles in CE.

At previous SCC meetings you approved an approach to the implementation of CE 2.0 that included:

1. Beginning the process with an offer of Problem Solving to everyone;
2. Enrolling those who are not successfully assisted immediately with Housing Problem Solving (HPS) in the shared Coordinated Entry program;
3. Using the Profile and CE enrollment plus a few additional questions for a Crisis Assessment leading to a community queue for some shelter and TH referrals;
4. Using additional questions, including most of the custom ones from the previous assessment, for a more in-depth Housing Assessment to cover PSH, RRH, and other targeted permanent housing programs as they emerge, such as shallow subsidies and deeply affordable housing for formerly homeless households;
5. Other more minor changes to the assessment questions and scoring;
6. Collecting information from all programs in HMIS to be able to track open beds/units/slots and do matching and referrals in HMIS.

The workgroup met three more times during August and focused on:

- Reviewing the new work flow as now programed in the HMIS training site and identifying questions or changes;
- Discussing training needs and key messaging and making recommendations to HCSA and BitFocus for a training approach;
- Reviewing a timeline and transition plan for implementing CE 2.0.

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<sup>1</sup> Workgroup participants include representatives of the Cities of Berkeley and Oakland, HCSA and HCD; HRC supervisory staff from BACS, Abode and East Oakland Community Project, and staff from EveryOne Home and Bitfocus.

## 1. Training and messaging approach for new process steps

The work group discussed the importance of clear messaging about the new process for both clients and providers. Distinctions were made between needed messaging for those new to the CE process and those who have been involved in CE before and are likely being reencountered, reassessed, and newly or re-engaged in HPS.

The group recommends messaging that includes:

1. **Flow Diagram:** Create a simple flow diagram of the steps in the process that can be used with providers and especially with access point problem solvers.
2. **Key Messages:** Create key overall messages that include:
  - a. How to explain the steps in the process for participants and for providers, including a brief overall explanation of the information gathered at each step and how the information will be used (profile, enrollment, HPS, crisis assessment, housing assessment);
  - b. Focus attention on HPS first; setting realistic expectations about system resources and the likelihood of a resource match within a given time period;
  - c. Set clear expectations with people about what staff can help with, available time in the moment and future to work with them, and next steps in the process.
3. **Tailoring:** Having a tailored message for people familiar with the prior CE system that describes the CE changes, why they are being reassessed, and what to expect.
4. **Expectations after Assessment:**
  - a. For people added to a community queue after an assessment:
    - i. What they can expect in terms of kind and timing of referrals;
    - ii. What next steps they can take related to gathering needed documents such as identification and income verification, providing current contact info, and the best ways to stay in touch;
    - iii. What the assessor/problem solver can offer in the moment and future;
    - iv. Offer to upload important documents to HMIS for current or future use.
  - b. For people not being added to a community queue:
    - i. That they are not currently eligible for a referral to a housing crisis response system resource;
    - ii. That there are other resources that the housing crisis response system does not control that they can apply for and how to access those resources;
    - iii. That they continue to be eligible for HPS and can return if they want to explore and receive support for a housing solution.

**Next Steps:** Management Entity and Bitfocus will work on training materials and an approach that builds out these messages and incorporates them into the HMIS training as well as overall CE guidance.

## 2. Transition Plan and timeline

As with the previous CE 1.0 transition that aligned multiple different assessments and lists and created a single By Name List (BNL) across the county, this transition will involve a phased process.

Timeline:

- October 1: Finish buildout and testing of new process in HMIS by end of September and hold a “soft launch” with a few key providers;
- October 1-31: System-wide training and begin CE enrollments, HPS, and assessment/reassessments using new phased assessment process;

- November 1: Turn off old assessment;
- November 1 or after: Begin using Crisis Assessment list for certain shelter and TH referrals; Continue to use BNL for housing referrals until January 30;
- Feb 1, 2021: Complete transition of assessment process and use new approach for prioritizing and matching clients to available resources.

Transitioning to programs posting openings, making referrals, and filling slots/beds/units within HMIS will take time to establish for all key housing crisis response system programs. The Management Entity recommends starting this approach in November with a few shelters and TH programs that currently utilize CE for matching and referrals. Permanent housing programs will begin using this approach by February 1, 2021. The Management Entity estimates it could take six months to one year to bring most programs in to an HMIS matching and referral process.

### 3. Additional Issues for SCC consideration

During the workgroups process several issues, concerns or areas that need system-level attention were raised that the group did not believe were in its purview to address but wanted to bring to SCC attention as areas of concern or unmet need. These include:

1. **Rapid Re-Housing (RRH) standards:** The need for system-wide shared standards for rapid rehousing including clarity about eligibility and target populations, program design expectations, and program performance expectations.
2. **CE Integration with DV System:** The need for a clear policy and plan for how DV providers and the CE process work together to ensure victims of DV can access resources in both systems while preserving their safety and need for confidentiality.
3. **Shelter funding:** The gap in funding for services in shelters that many shelters need to comfortably accept higher needs people and to take on Housing Problem Solving practices and broader efforts to help people exit shelter for permanent housing.
4. **Design clarity:** The group identified a need for greater clarity about the specific designs and intended target populations for new program models included in the System Modeling. Basic information was used in the discussions and incorporated into the process as best as possible but more specifics will be needed to conduct matching and potentially refine the assessments for new program types such as shallow subsidies and enriched permanent supportive housing.
5. **Reporting needs:** The group recognized the need for HMIS to produce reports that support the CE process operationally, e.g., reports of open beds or people who need reassessments, and reports about the functioning of the CE process, e.g., timeliness of certain steps, demographics of those assessed/assisted, and outcomes. The group did not design custom reports for the new CE process but recommends the Management Entity and SCC determine how and where those reports will be developed.

In addition to these identified system gaps, the workgroup identified several process recommendations for future workgroups, including:

1. Increase clarity about the role of the workgroup at the outset, including specificity about what decisions it is charged with, and knowledge of prior decisions that influence the work of the workgroup;
2. Develop methods for a wider range of feedback particularly from front-line staff and people with lived experience while adhering to a specific timeline; and
3. Ensure adequate time for exploring options, making recommendations, and analyzing the potential impacts of the recommendations.