



## SACRAMENTO STEPS FORWARD

Ending Homelessness. Starting Fresh.

Coordinated Entry Committee & Evaluation Committee Meeting  
Monday May 20, 2019 from 2:30-4:00 p.m.  
1331 Garden Highway, Sacramento, CA 95833

VCR Room (second floor)

Agenda Item	Presenter	Time	Item Type
1. Welcome and Introductions	Co-Chairs John & Andrew	2:30PM (5 min)	Action
2. Committee combination moving forward <ul style="list-style-type: none"><li>Attendance gaps</li></ul>	John & Andrew	2:35PM (20 min)	Announcement
3. Governance Committee update	Cindy	2:55PM (10 min)	Announcement
4. Review interim policies, transfers and case conferencing. <ul style="list-style-type: none"><li>Move to put Policy and Procedure Amendment processes, transfers, and case conferencing onto website for public comment.</li></ul>	Tristina Stewart	3:05PM (30 min)	Action
5. Provider profile document	Tristina Stewart	3:35 PM (10 min)	Discussion
6. Announcement re: HUD CES Data requirements	Tristina Stewart	3:45PM (5 min)	Announcement
7. Future agenda topics in addition to policy calendar/ draft work plan	Co-Chairs John, and Andrew	3:50PM (15 min)	Discussion

8. Adjourn	Co-Chairs John, and Andrew	4:00PM	Action
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## Draft 2019 Coordinated Entry Interim Policy Development Plan

Component/Activities	CES Phase	Start Date	End Date	Status
<i>Product/Deliverable: Recommendations to the CoC Advisory Board for interim additions to the existing CES Policies and Procedures.</i>				
<b>Case Conferencing Policy and Procedure:</b> <i>HUD expects that being unable or unwilling to complete an assessment should not bar an individual from receiving homeless services. The Case Conferencing policy was designed to address this gap in previous policies.</i>	Assessment	Feb-19	Jun-19	
<b>Transfer Policy and Procedure:</b> <i>Transfers can be initiated due to a change in household composition, poor program fit, or if a program is closing due to loss of funding. HUD expects CoCs to place priority on transfers in CES system. The transfer policy was designed to address the gap in previous policies.</i>	Prioritization	Feb-19	Jun-19	
<b>Project/Programmatic level Requirements Policy:</b> <i>Community priorities proposed in projects do not supersede funding requirements, but are overlaid with them.</i>	Access	Jun-19	Sep-19	
<b>By-Name-List &amp; Priority Queue Policy:</b> <i>The By-Name-List (BNL) is a dynamically-generated list of homeless people within the Sacramento CoC that can be exported from HMIS. The full list includes every literally homeless person in the CoC that has had a logged HMIS service or contact within the prior 90 days or is enrolled in a program.</i>	Prioritization	Jun-19	Sep-19	
<b>Sub population access site policy:</b> <i>HUD approves of sub-population access points due to the ability of the client to access wrap-around services. Currently these are staffed by, and located at SVRC and Wind Youth.</i>	Access	Jun-19	Sep-19	
<b>Required Client documents:</b> <i>Certain documentation requirements are upheld by HUD (chronic homelessness, literal homelessness, disability) and other document requirements are established by providers or property owners/managers.</i>	Referral	Aug-19	Nov-19	
<b>Referral Timeline Policy:</b> <i>There needs to be a determined amount of time before pending CES referrals are considered to be a denial.</i>	Referral	Aug-19	Nov-19	
<b>VI-SPDAT Training Requirements Policy:</b> <i>VI-SPDAT requires additional training beyond HMIS. There is best practice guidance from the assessment's which is provided by the creators of the assessment. Assessors must be trained by SSF staff in order to assure a reflective assessment score for the client.</i>	Assessment	Aug-19	Nov-19	
<b>Client Complaint Resolution Policy:</b> <i>There is currently no formal process for dealing with complaints which relate to the Coordinated Entry system. The present practice involves written letters addressed to SSF's Chief Programs Officer.</i>	Any phase	Oct-19	Jan-20	
<b>Client Complaint Policy- provider specific:</b> <i>As lead agency, SSF often receives complaints from clients related to provider services. SSF would benefit from updated copies of each agencies grievance procedures in order to help address client concerns.</i>	Any phase	Oct-19	Jan-20	
<b>Referral Denial Policy:</b> <i>In housing first communities, providers are not supposed to deny a CES referral unless there are extenuating circumstances. The 'other' denial reason should be reexamined.</i>	Referral	Oct-19	Jan-20	
<b>Dynamic Prioritization Policy:</b> <i>Prioritization of subsidies for the most vulnerable; encourage non-subsidized resolution for less vulnerable individuals.</i>	Referral	Dec-19	Mar-20	
<b>Higher Levels of Care Policy- determination guidance:</b> <i>The community has a gap in services for people needing more support than PSH can provide. CES needs a way to determine when PSH is not a viable option, and where to refer .</i>	Referral	Dec-19	Mar-20	

Policy Development Status Color Key:

CoC approved	Not yet reviewed	In Review	Comment	To Be Developed
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Policy:	Case Conferencing Appeal Policy and Procedure
Applies to:	Coordinated Entry Policy & Procedure Manual
Amends:	VI-SPDAT referral ranges page
Approved:	

## Rational

HUD expects that being unable or unwilling to complete a universal assessment should not bar an individual from receiving homeless services. The Case Conferencing policy was designed to address this gap in previous policies.

## Policy:

This Policy applies when the client, or staff working with the client determine that the VI-SPDAT score does not match the client's actual level of service need in order to maintain housing.

The policy also applies if someone is unable to consent to an assessment, or they are unwilling to participate in the assessment.

## Procedure:

1. To request Case Conferencing, providers must complete a Case Conferencing Prioritization Appeal Notification Form that is signed by supervising staff, who have knowledge of the situation.
2. The Provider shall email the form requesting Case Conferencing to the CES Referral Specialist and/or the CES Program Manager.
3. CES staff will review the form and supporting materials provided and schedule a meeting with all relevant and appropriate parties within 2 weeks from the date the request is received.
4. If supporting documentation and information demonstrates the need for an alternative level of support, and if HUD/funding requirements are satisfied, then the client will be considered for the newly determined housing intervention. CES staff will re-classify the client within HMIS as eligible for the appropriate intervention.
5. Not all Case Conferencing requests will result in score re-classification. In the event that a client or provider disputes the denial of the Case Conferencing Appeal then an explanation of the

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reasons for denial will be provided in writing, and an opportunity to provide additional information or support will be granted.

Forms: Case Conferencing Appeal Notification Form



Policy:	New or Amended Policy Adoption Procedure
Applies to:	CES or CoC Policies
Amends:	
Approved:	

**Rational:**

New or adopted Coordinated Entry System or CoC policies should have opportunities for public input and a clearly documented input and adoption process.

**Policy:**

New or amended policy proposals shall be generally first reviewed and vetted in appropriate CoC committee, then made available on SSF website for input and finally adopted by the CoC Advisory Board.

**Procedure:**

1. Committee will work with SSF staff to prioritize and review relevant policy concepts to be developed or amended.
2. Committees review and approve newly proposed or amended draft policies for public review.
3. Once approved by a Committee, the draft policy and/or procedure will be posted for public comment on the Sacramento Steps Forward website for a minimum of 2 weeks and an email sent to CoC listserv notifying stakeholders of the draft policy.
4. SSF Staff will review and discuss any modification of draft policy based on public and stakeholder comments with the appropriate Committee.
5. Upon committee approval of final draft policy, the policy will be presented to CoC Advisory Board by the appropriate committee chair and SSF staff for adoption.



Policy:	Transfer Requests
Applies to:	Coordinated Entry Policy & Procedure Manual
Amends:	VI-SPDAT referral range page 22
Approved:	

**Rational:**

HUD expects CoCs to prioritize client housing transfers in CES systems when necessary due to poor program fit for a client, changes in household composition, client preference, or other extenuating circumstance including program closure. Prioritizing transfers helps avoid a client’s unsuccessful exit from housing.

**Policy:**

Client transfers may be requested by a provider or client if either determines they cannot provide for the client’s required level of need or due to changes in household composition, client preference, or other extenuating circumstance.

**Procedure:**

1. Providers or clients may initiate a request for program transfer by emailing CES staff with a completed Transfer Request Form which documents reasons for a transfer request and actions taken for client to remain in the program or not experience a negative outcome.
2. If a transfer is initiated by a provider, an acknowledgement by client that a transfer is being requested is required. Client acknowledgement ensures a client-centered approach where the client is able to be a part of the solution, and understand the circumstances that led to the requested change.
1. CES staff will review transfer request and determine if a transfer is appropriate and necessary for the success of the client. If approved, CES staff will request the Additional Client Information form from the provider and prioritize for next opportunity that the client is eligible for.

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2. If transfer request is denied, CES staff will provide written rationale for denial.  
Requestor can appeal decision by providing additional written justification to CES Manager for review and reconsideration.

**Forms:**

Transfer Request Form, Program Transfer- Additional Client Information