Coordinated Assessment Work Group Minutes
May 14, 2015
1:00-3:00pm
The Health Trust – 3180 Newberry Drive, San Jose CA

Attendees:
Chad Harris (Sacred Heart Community Service), Trang Van (The Health Trust), Leah Gronlund (Santa Clara Adult Ed), Consuelo Collard (Catholic Charities), Laura Foster (Bill Wilson Center), Bob Russell (Community Technology Alliance), Michelle Covert (City of San Jose), Allison Ulrich (VA), Jennifer Knapp (VA), Maggie Miller (Office of Supportive Housing), Erin Stanton (Office of Supportive Housing), Hilary Barroga (Office of Supportive Housing)

1. **Welcome and Introductions**

2. **CoC Updates**
   a. ***Housing Inventory Count (HIC) and Point-in-Time (PIT) Count*** – Community Technology Alliance, Applied Survey Research, the San Jose Housing Department, and the Office of Supportive Housing are in the process of preparing the HIC and PIT for submission to HUD by the extended deadline of May 15th. The complete report on the 2015 Homeless Census and Survey will be available in June.
   b. ***CoC Registration*** – The Office of Supportive Housing completed Santa Clara County's CoC registration. This is the first step in the HUD NOFA competition and ensures that Santa Clara County is eligible to apply for CoC funds.
   c. ***CoC Board Updates*** – The CoC Board accepted the recommendations of the NOFA Committee for the scoring tools and local priority listing process for the upcoming NOFA competition. Also, the CoC Board approved a Delegation of Authority Table that clarifies roles and responsibilities of the CoC Membership, Board, Executive Committee, Collaborative Applicant, and HMIS Lead.
   d. ***Performance Management Work Group*** – Meets the 3rd Thursday of the month at the same time and place as this meeting. The group is finalizing communitywide performance measures that are based on the 2014 HUD System Performance Measures. HUD recently released further guidance on programming specifications for their measures.
   e. ***TA Visits*** – HomeBase is conducting Technical Assistance visits with HUD CoC grantees this month. These visits help grantees make sure their CoC programs and grant management are strong in anticipation of the upcoming CoC NOFA competition.
   f. ***HMIS Transition*** – The CoC Board approved Bitfocus, Inc.'s Clarity Human Services software to be the new HMIS software for Santa Clara County. The Office of Supportive Housing is working with Bitfocus to develop an implementation timeline and updating various documents associated with HMIS. The transition is on track to implement the new HMIS in October.

3. **Review of Work to Date**

To date, the Coordinated Assessment Work Group has:

- Agreed to a community vision for coordinated assessment: "that we have a fully engaged coordinated assessment system with centralized assessment and all emergency shelter, transitional housing, permanent supportive housing, and rapid rehousing placements made through the system."
- Agreed to start with coordinated assessment for permanent housing placements (and add transitional housing and emergency shelter in a later phase).
- Agreed to use VI-SPDAT and SPDAT tools (see www.orgcode.com to learn more).
- Agreed to year one goals, dates may be subject to change based on the timeline for the HMIS transition.

4. **Coordinated Assessment System Overview**

A brief overview of HUD's vision of coordinated assessment was shared, highlighting the following:

- The primary purpose of coordinated assessment is making quick and effective matches for housing needs regardless of a person's location.
- Access process: one entry process for the system (not program to program). The system will be able to identify among all the options in the community what will be the best fit.
    - Santa Clara County's model will have multiple access points but into the same system.
- Assessment: standardized assessment, just an initial assessment for placement, common for all clients
    - Santa Clara County's model will use the VI-SPDAT
- Referral: effective, consistent, participatory, accurate, seamless, informed, and electronic referrals to housing and services.
    - Referrals will create a prioritized wait list for housing.
    - We need to think of subpopulations (domestic violence survivors and youth) and how can we protect their information and safety.

The group brainstormed desired outcomes from implementing a coordinated assessment process in Santa Clara County. Desired outcomes included:
- More effective matching between the household and the intervention leading to better housing outcomes
    - Clients will no longer get the run around to get services
    - People get connected to the right intervention the first time they enter the system
    - Programs are fully and efficiently utilized
    - Objective decision making
    - Fewer people fall through the cracks

- User Friendly System
    - No wait time or minimum wait time from referral to assistance
    - Those most needy get served and not overlooked
    - People don't need to provider shop
    - No matter the point of entry all participants have the same access to programs and referrals

- Improved collaboration across the system of care
    - True collaboration among all agencies that are part of the system
    - Social ministry and faith based programs also participating
    - Consistency among users of VI-SPDAT, and training for new users.

- Better information that informs more strategic efforts
    - Greater understanding of need because of categorized waiting list
    - Data provides accurate account of life cycle of what it takes to successfully house a household
    - Ongoing review of how or whether the system is working and if it needs adjustment
    - Data is reliable enough to provide gap analysis. What is needed to house everybody?

The group also brainstormed concerns that need to be taken into account during the planning process. Concerns included:

- Collaboration is challenging
    - Getting everyone to participate
    - Different agencies operate differently. Will it be coordinated?
    - Providers don't buy in and go solo
    - Translation between government agencies

- Training
    - How to make sure the person doing the assessment is properly trained
    - Training of new employees
    - Errors on assessment

- Lack of resources, especially housing to meet the need
    - People get a sense of false hope
    - People have to stay on the registry for a long time because they are lower need
    - Having another experience of great idea but with so few resources nothing changes
    - Youth may not be seen as in need comparing to other populations

- How changes will impact the existing system
    - How will existing waitlists be impacted or integrated
    - Time it takes to administer assessment
    - How access points will be implemented

5. **Framework for Policies and Procedures**

The group brainstormed policies and procedures that will be needed to implement coordinated assessment. While brainstorming, they also discussed key decisions that will need to be made in order to create policies and procedures and who we will need to seek input from in order to make those decisions. Policies and procedures will need to cover:
- Assessments

- Prioritized List
- Making Housing Placements
- HMIS
- Communication
- Access Points
- Training
- Confidentiality
- Outreach

Following the meeting, input from the policies and procedures brainstorm will be used to begin drafting policies and procedures and to develop questions for soliciting input from clients, point of entry providers, and permanent housing providers. Key decisions will be discussed at future Work Group meetings and the Work Group will review and revise draft policies and procedures.

Laura Foster shared that there may be a youth focused VI-SPDAT in the works. A youth VI-SPDAT would provide an assessment targeted to the experiences of transition age youth that provides a score for youth that is comparable to the standard VI-SPDAT.

6. **Proposed Work Plan**

According to the Coordinated Assessment Work Plan agreed on at an earlier Work Group meeting, the next three months are focused on soliciting input, especially from three key groups: clients, point of entry providers, and permanent housing providers. June's meeting is intended to focus on client input. The group discussed effective methods for soliciting input and decided to utilize existing client meetings at a range of organizations to request feedback. Office of Supportive Housing staff will draft an overview of the coordinated assessment process and a list of questions for soliciting input. The Work Group will review and provide feedback on the draft the last week of May. During the month of June, Work Group members will solicit client input at their own organizations and reach out to colleagues at other organizations to do the same. Input will be brought to the July meeting to be shared.

7. **Check Out**

The June Work Group meeting will be canceled to allow more time for Work Group members to solicit client input. A conference call will be held instead to check on progress.

The July Work Group meeting will be Thursday, July 9th from 1-3pm at The Health Trust. This meeting will focus on Point-of-Entry considerations.