Strategies for Evaluating and Monitoring Coordinated Entry

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Learning Objectives

We hope you leave this session with…

- An understanding of HUD requirements and best practices around evaluating and monitoring coordinated entry,
- Some examples of coordinated entry evaluation and monitoring currently occurring in the field, and
- Ideas on what data you want to collect and analyze to evaluate and monitor your own coordinated entry system.

Evaluation vs. Monitoring

For this session, we define these terms as:

- **Evaluation**: an (at least) annual comprehensive analysis of the CoC's coordinated entry system; and
- **Monitoring**: frequent (e.g., monthly) and regular overview of coordinated entry data to allow for tracking of progress and identification of issues.

Is your community evaluating, monitoring, both, or neither?

Why?

Evaluating and monitoring your coordinated entry is important because:

- **It's a HUD requirement.** Coordinated entry notice requires an annual evaluation.
- **We need to know whether coordinated entry is operating as intended.** Does our system meet HUD requirements, follow the intended coordinated design and our policies and procedures?
- **We want to know how to make our system better.** Monitoring and evaluation allow us to identify our successes and challenges.

Approaches

Evaluations can focus on different aspects of coordinated entry, such as:

- **Compliance:** evaluates whether the CE process meets HUD's requirements and the CoC's design.
- **Effectiveness:** evaluates how effective their CE process is in connecting people experiencing homelessness to appropriate referrals.
- **Process:** evaluates how the CE process has been implemented and whether it is currently operating in accordance with the CoC's established policies and procedures.

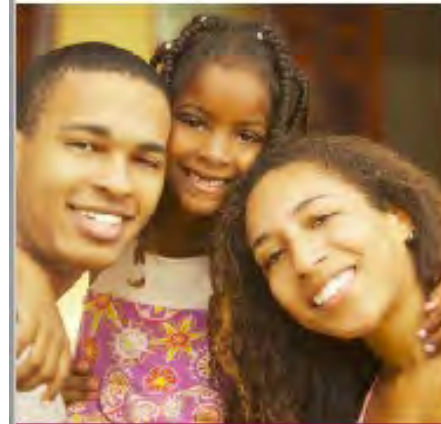What approach does your evaluation take?

Evaluation Plan

Plan should describe:

- Which aspects of the effectiveness of the coordinated entry process will be measured
- Which aspects of the coordinated entry process will be evaluated for fidelity to local policies and HUD's coordinated entry requirements
- How data and required stakeholder input will be gathered
- How partners (e.g. ESG or SSVF grantees) will be included in the evaluation process to ensure consistency in data and analysis
- How the CoC will (or will not) use evaluation results to inform other aspects of system monitoring and planning, including whether the community has too much or too little of specific housing and/or service intervention types

Evaluation Plan

- Note that the coordinated entry management entity cannot perform the annual evaluation

- [Coordinated Entry Management and Data Guide](#) provides insights on how to craft an evaluation plan and carry out the evaluation

Data Sources

The annual evaluation should rely on multiple sources:

- Participant interviews and focus groups (required)
- Projects participating in coordinated entry (required)
- Call center or intake data
- Screening and/or assessment tools and results
- Policies and procedures and other governance documents
- Observation of the assessment process
- Interviews with key stakeholders
- Cost and resource data
- HMIS data, and/or data from other CE management systems

Examples: Evaluation

Early coordinated entry evaluations:

- [Los Angeles](#)
- [Seattle/King County](#)
- [Dayton/Montgomery County](#)
- [Southern Nevada](#)
- [Grand Rapids](#)
- [San Francisco](#)

Evaluation recommendations: Dayton/Montgomery County

Improve Governance:

- Develop CoC-wide written standards and update written policies and procedures that document Coordinated Entry is implemented
- Make improvements to the Intake and Comprehensive Assessment Tool

Strengthening System Performance:

- Implement more targeted diversion strategies prior to entry into shelter
- More fully integrate RRH into the Coordinated Entry process

Evaluation recommendations: Southern Nevada

Improve Access:
- Develop strategies to better inform and promote access for clients in remote areas and other populations that utilize coordinated entry at lower rates
- Ensure staff at all access points are regularly trained on identifying the signs of DV so they can more quickly refer survivors to DV-specific providers

Assessment and Prioritization:
- Develop an orientation packet for clients that contains information about what to expect and what is expected after the assessment is complete
- Set policy on how to prioritize clients who were assessed using previous assessment tools
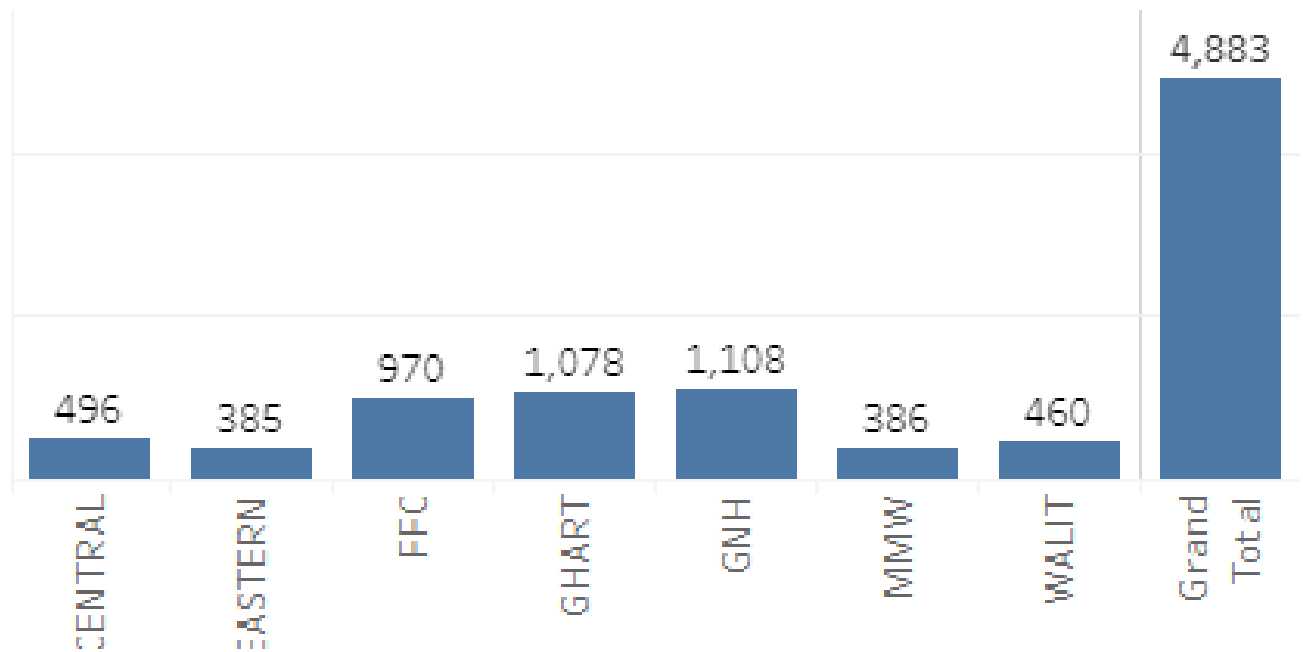
Examples:
Monitoring: Connecticut

CT Coordinated Access Data Dashboard

Report Start Date	Report End Date	Household Type	CAN
4/1/2019	6/30/2019	(All) ▾	(All) ▾

Number of Calls for All Household Types to 211

	Month of Call Date			
CAN	April 2019	May 2019	June 2019	Grand Total
CENTRAL	456	490	516	1,462
EASTERN	652	639	635	1,926
FFC	1,092	1,177	1,094	3,363
GHART	1,784	1,722	1,658	5,164
GNH	1,171	1,128	1,203	3,502
MMW	433	379	363	1,175
WALIT	594	526	613	1,733
Grand Total	6,182	6,061	6,082	18,325

Examples:
Monitoring: Connecticut

Age Ranges

25+ 87%	18-24 13%

Appointment Outcomes

Attended 3,091 63%	No Show 1,554 32%	

Household Type

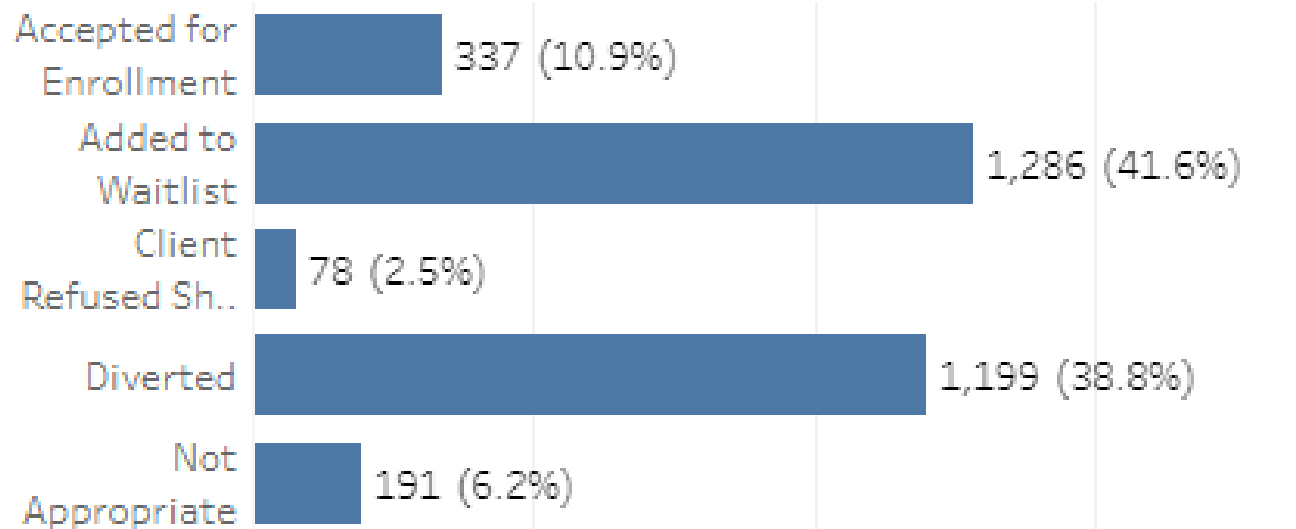| INDIVIDUAL 3,618 74%	FAMILY 1,265 26%

Gender

Female 681 56%	Male 541 44%
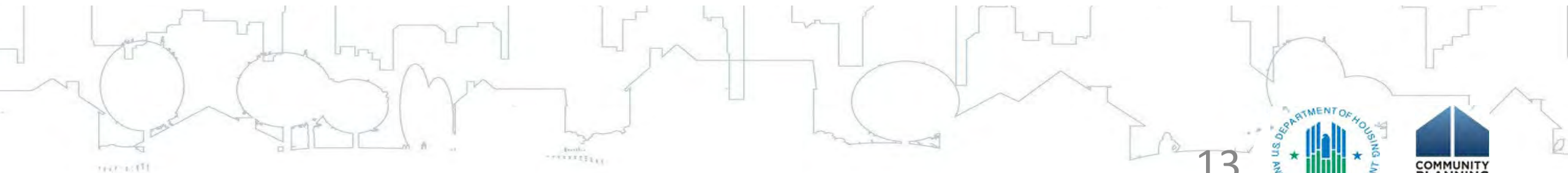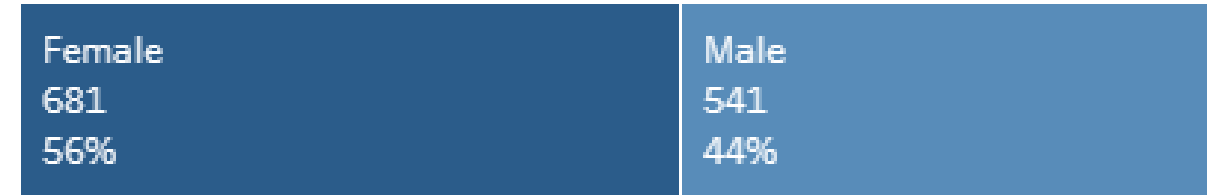
Examples: Monitoring: Connecticut

Appointments

496	385	970	1,078	1,108	386	460	4,883
CENTRAL	EASTERN	FFC	GHART	GNH	MMW	WALIT	Grand Total

Outcomes of Attended Appointments

Accepted for Enrollment	337 (10.9%)
Added to Waitlist	1,286 (41.6%)
Client Refused Sh..	78 (2.5%)
Diverted	1,199 (38.8%)
Not Appropriate	191 (6.2%)
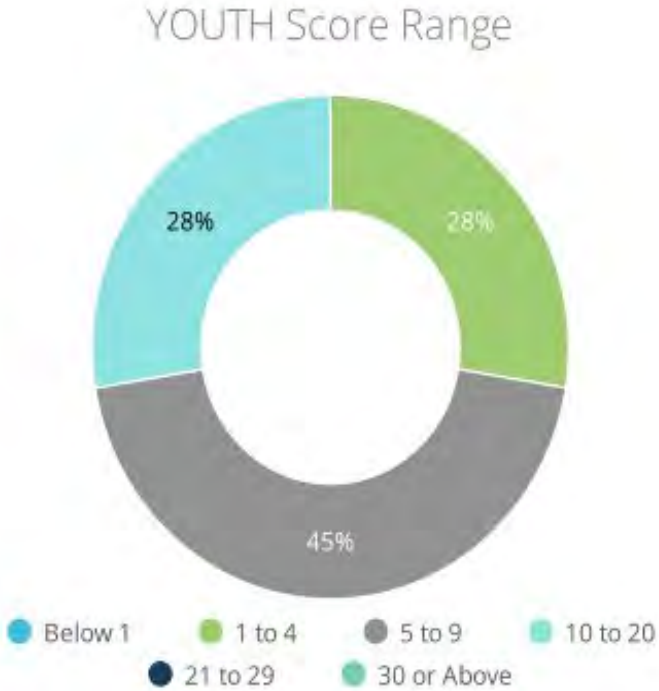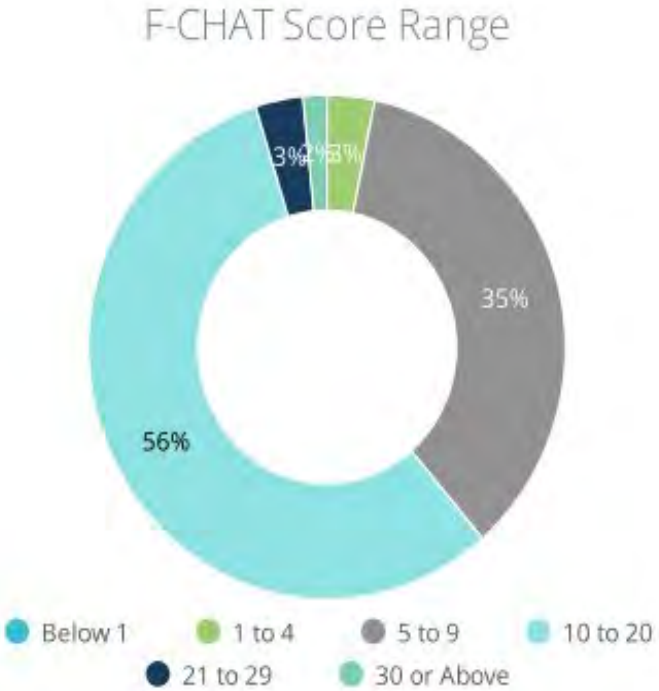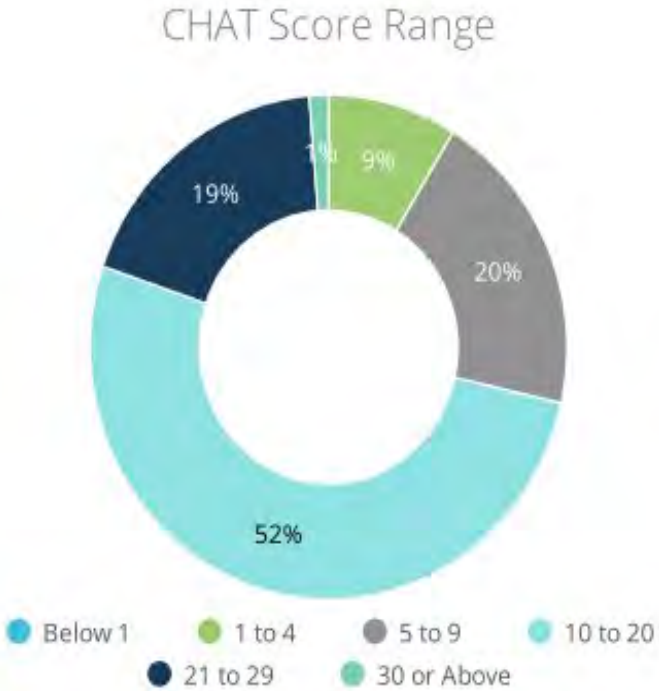
Activity

- Break into three groups around room based on current progress of CE evaluation:

    Planning   In Process   Completed / Close to completion

- Each group will discuss: needs, barriers experienced, strategies for getting beyond the barriers, and next steps

- Each group has a scribe and a reporter

- Regroup to share reflections for last 5 minutes

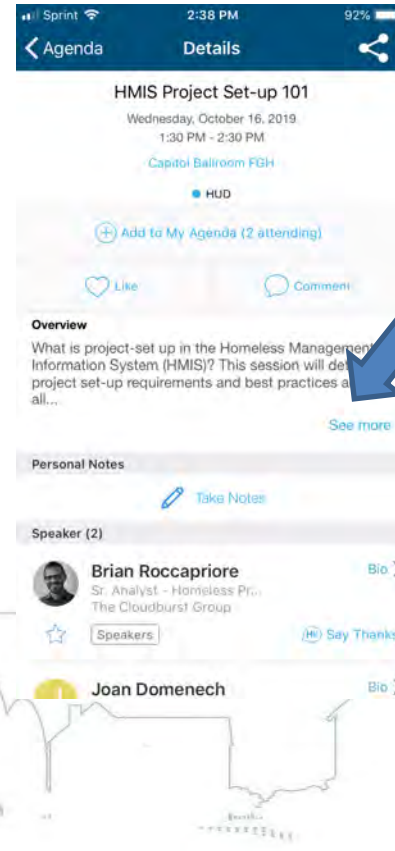- Take photos of final lists to bring home

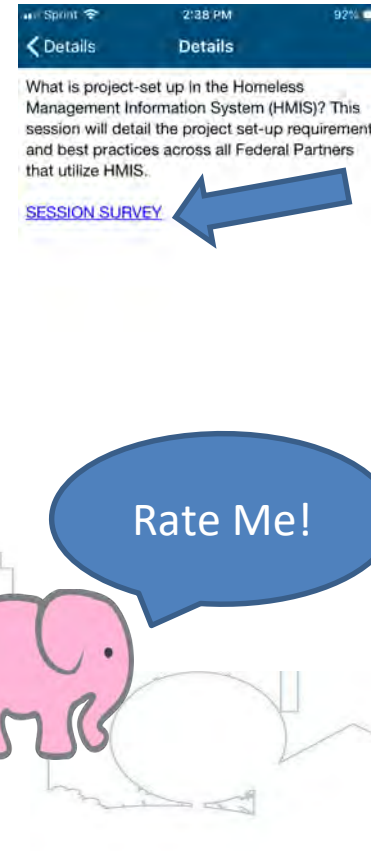# Evaluate This Session on Your Conference App!
(It takes 5 minutes to complete)
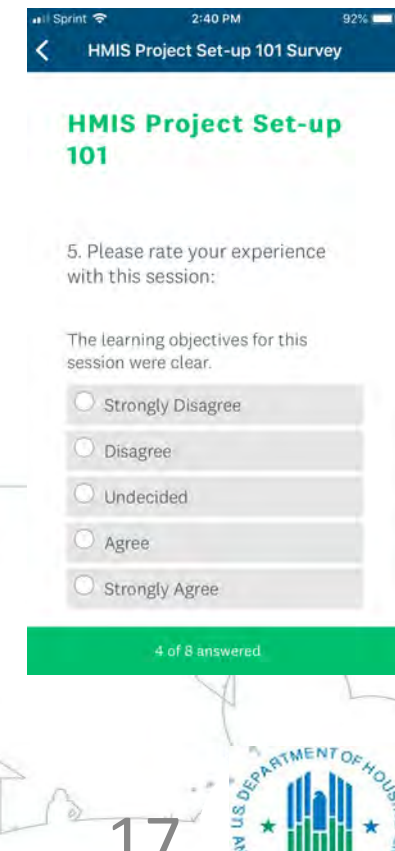
1) Select the name of the session from the agenda tab.
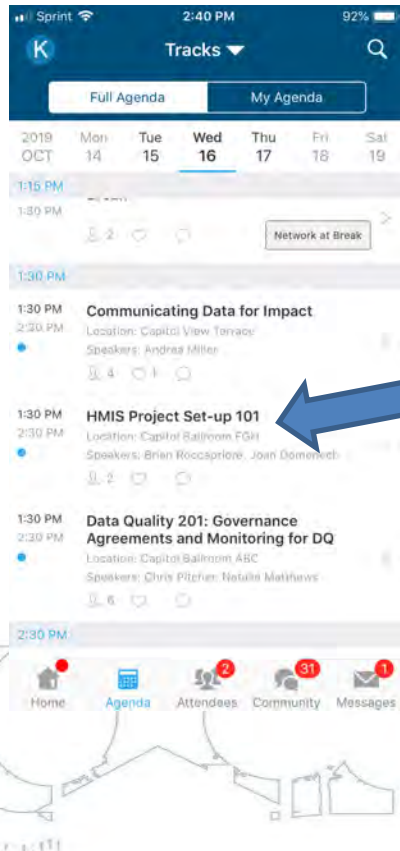
2) Select "See More" under the Overview.

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4) Complete the Evaluation and Select "Done".

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