



*4.07 Coordinated Entry: Dynamic Prioritization and Real-Time Data Management*

2018



# Learning Objectives

- Understand the key differences between assessment and prioritization
- Understanding the concept of phased assessment
- Understand the concept of dynamic prioritization
- Understand how to determine if a CoCs prioritization policies are dynamic or static
- Understand how to put dynamic prioritization into practice



# Key Assessment and Prioritization Challenges

**Are any of these problems arising in your community?**

- a. Long list of people but few people are being assisted
- b. Not enough of the specific resource(s) we need to help everyone who scores for it.
- c. Routinely skipping over the highest need people without a plan to ensure they receive assistance.



# Key Assessment and Prioritization Challenges

**Are any of these problems arising in your community?**

- d. List(s) quickly become out of date
- e. Spend too long trying to locate people after assessment, or jump priority order to get to the people we can locate
- f. Stakeholders (providers, funders, CE operator) don't have confidence in what the assessment score is indicating



# Key Assessment and Prioritization Challenges

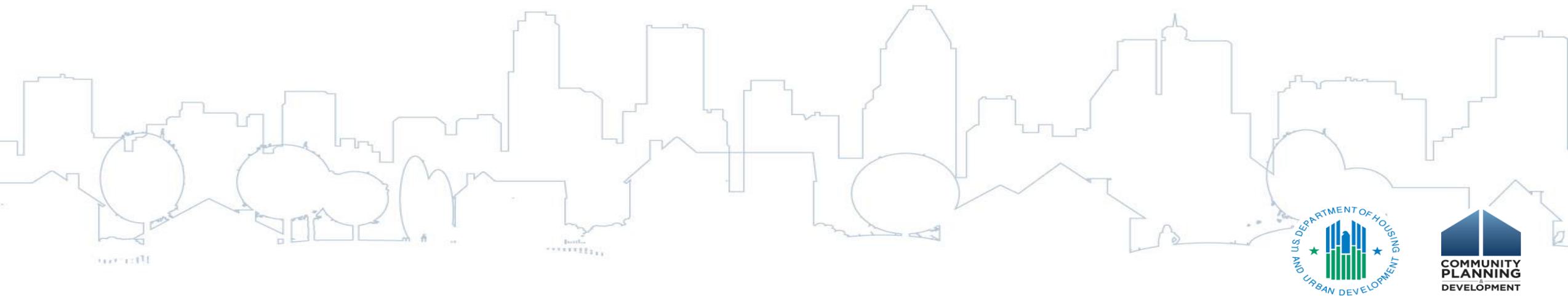
**Are any of these problems arising in your community?**

- g. The assessment process doesn't capture what is needed for eligibility – some people aren't eligible for the programs they are referred to
- h. People are not prioritized because they are not document ready
- i. People referred to housing tend to be more organized/resourceful; highest need persons fall through the cracks



# What do these challenges have in common?

These challenges often occur as a result of conflating the assessment and prioritization processes—two distinct elements of coordinated entry



# Assessment versus Prioritization

**Assessment:** the process of documenting participant needs and strengths, identifying barriers to housing, and clarifying participant's preferences and goals

***What does the person need?***

**Prioritization:** the process of identifying *which households*, among all those assessed, have the greatest needs and will therefore receive accelerated assistance to available housing and services within the CoC system

***Who should the CoC serve first?***



# Closer Look at Assessment

The core function of assessment is to determine a client's:

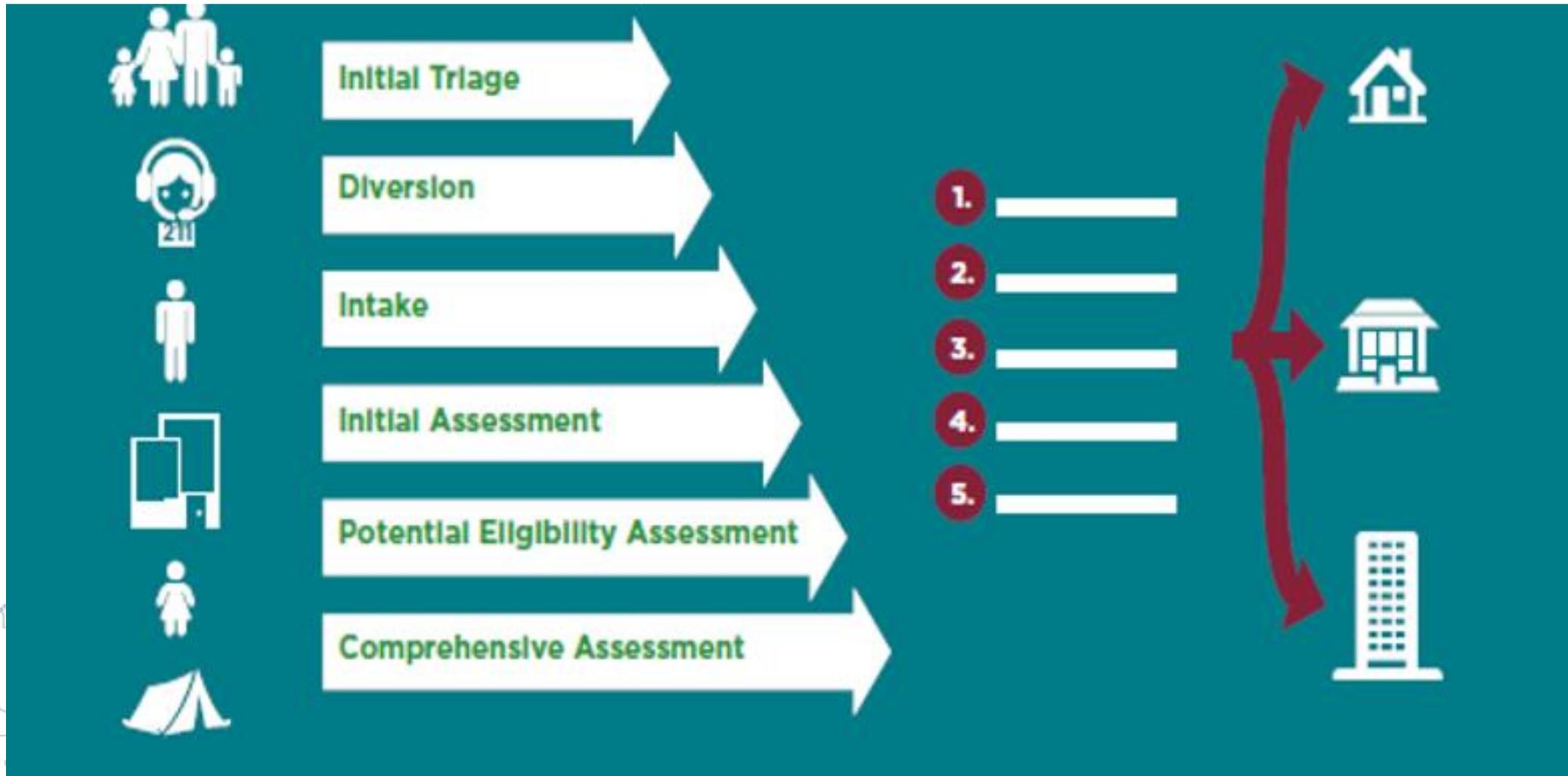
- Vulnerabilities
- Needs
- Preferences
- Strengths/assets, and
- Housing barriers, including homeless history

This information is used to:

- understand service and housing needs
- determine a strategy to resolve the client's housing crisis – ***housing plan***



# Phased Assessment Example



# Closer Look at Historical Prioritization Practices

- All systems prioritize, even if unintentionally
- Historically, homeless system prioritization was typically based on first-come first-served, luck, persistence, adherence to program rules, or perceived “readiness” for housing. Problems with this approach:
  - ✓ highest need persons not served first
  - ✓ unused capacity – beds/programs held for people who qualified for them
  - ✓ CoC management is resource-based rather than client-based; not building a comprehensive picture of true need



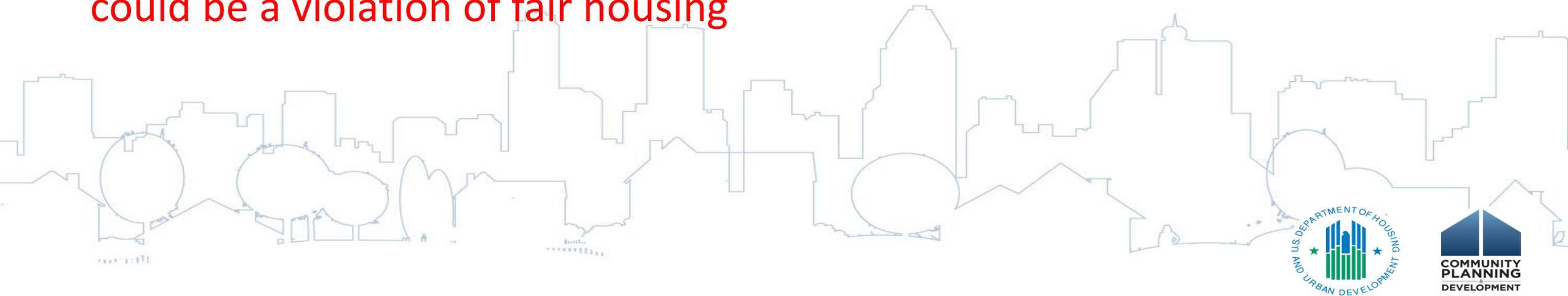
# Developing Prioritization Criteria

- HUD has provided parameters for prioritization factors
  - ✓ length of time homeless
  - ✓ being unsheltered
  - ✓ Vulnerability
  - ✓ service utilization
  - ✓ local goals
- Prioritization will likely consider factors collected during the assessment process



# Prioritization and Scored Assessment Tools

- If a community uses an assessment tool that generates a score (e.g. a vulnerability score), that score should **not** be the only factor used to assign service strategies or make prioritization decisions
- **Caution: Remember that prioritization cannot be based on specific disability type; if an assessment score weighs certain disabilities over others, this could be a violation of fair housing**



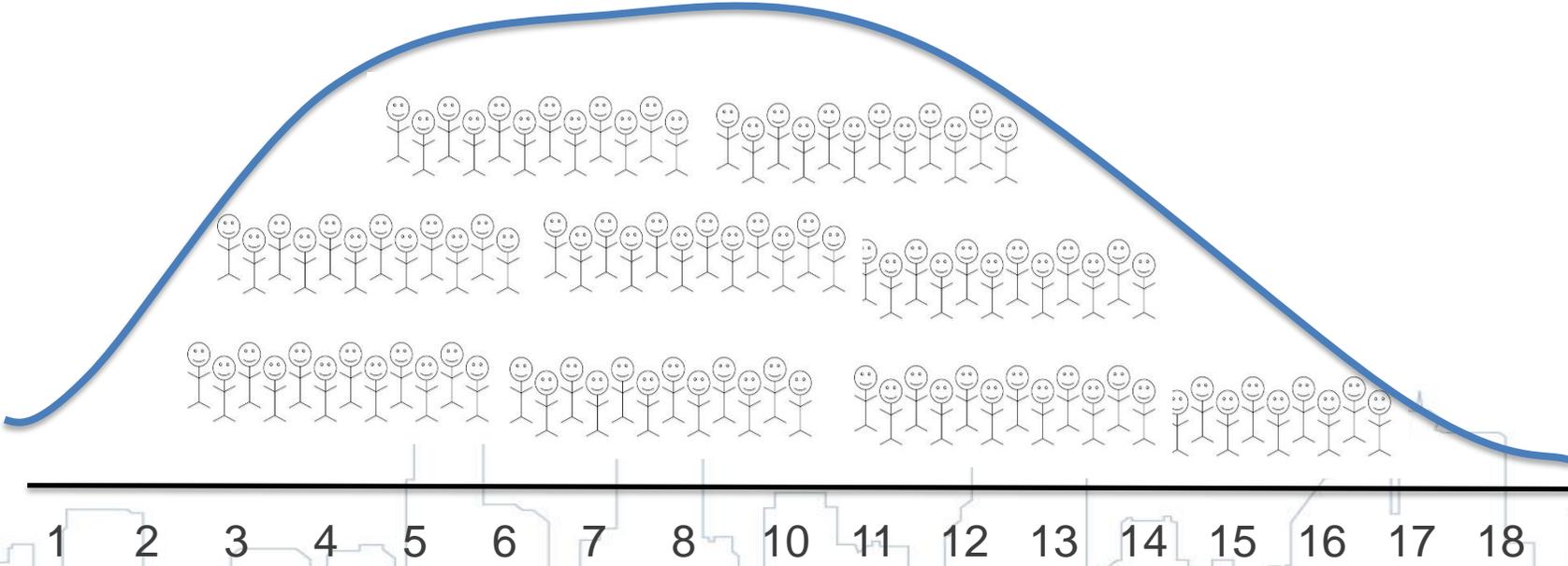
# Common Practice: Static Prioritization

## Static prioritization (“bucket approach”)...

- uses scores from initial assessment to determine the “most appropriate” intervention for that household and places person in queue for that intervention type
- People are placed in a static order on a “wait list” for a referral to an intervention type based on that score
- does not consider resource availability; “matches” people to one specific intervention, often resulting in most vulnerable waiting the longest for housing



# Sample: Prioritization Score Distribution

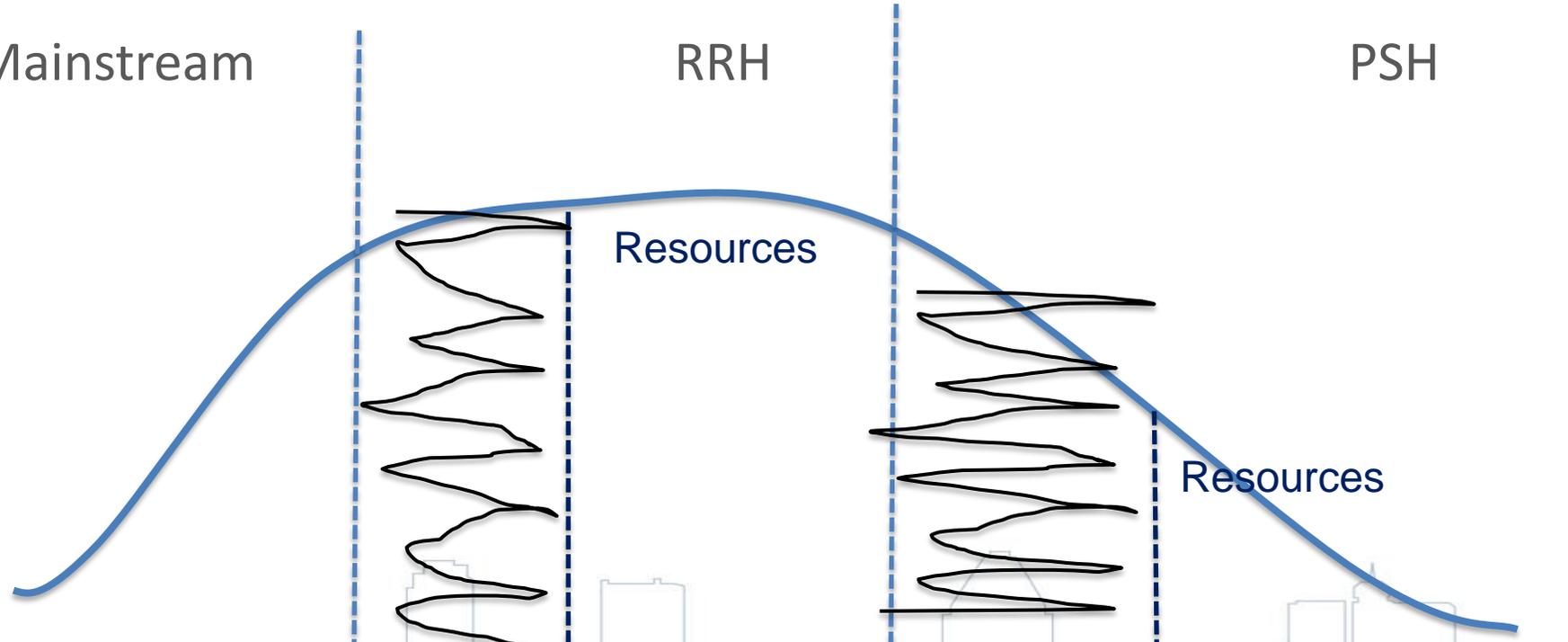


# “Matching” to Specific Intervention Type

Mainstream

RRH

PSH



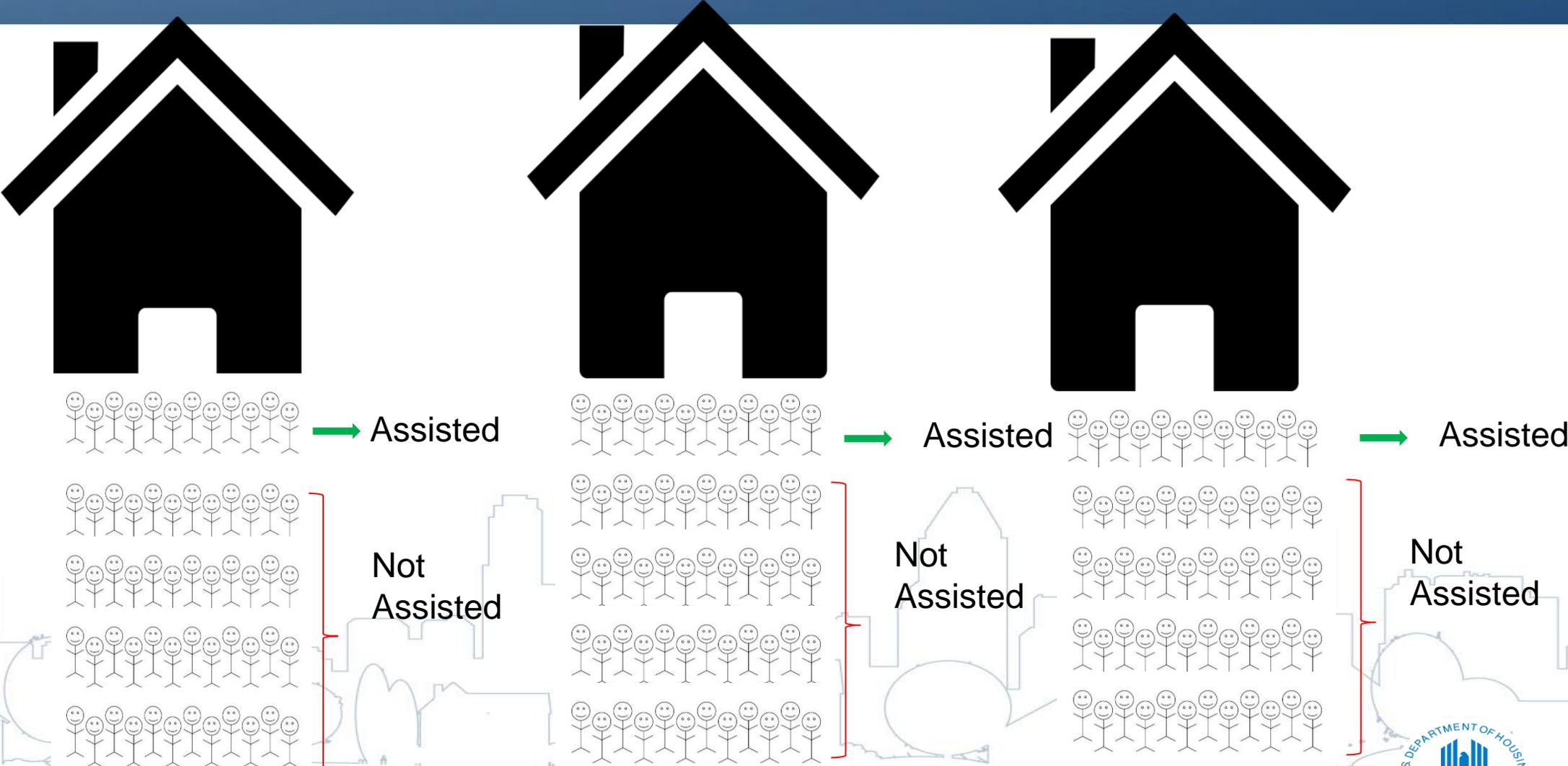
Assisted

Assisted

Assisted



# Results of Static Prioritization



# Dy-nam-ic

(of a process or system) characterized by constant change, activity, or progress

Synonyms: Charismatic, Effective, Productive, Progressive, Aggressive

Antonyms: Fruitless, Idle, Passive, Unproductive, Ineffective



# What *is* Dynamic Prioritization?

A dynamic process that uses prioritization criteria (i.e., assessment result, unsheltered status, length of time homeless) to identify the most vulnerable (preferably through a case conferencing process) based on the number of anticipated housing placements *across all resources* that will occur in the next XX days



# New Concept: Dynamic Prioritization

## Dynamic prioritization realities...

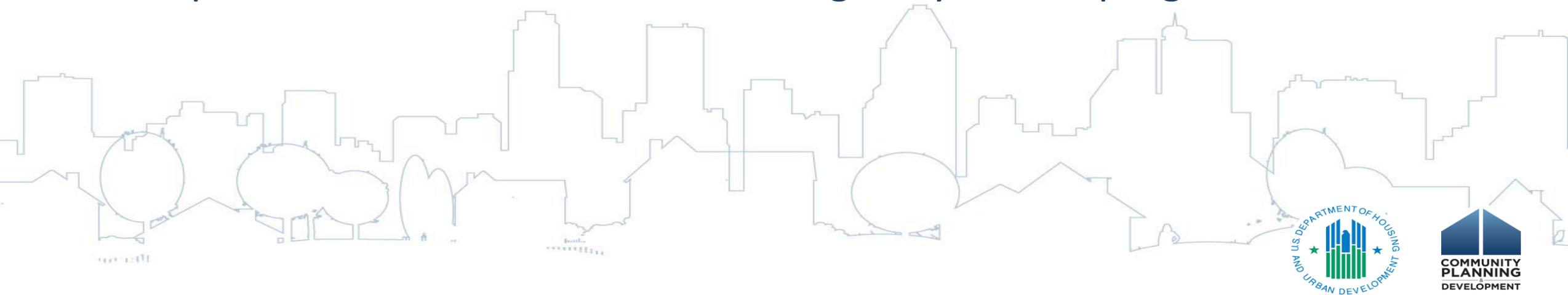
- ***Circumstances change*** – the highest need person today may not be the same person tomorrow
- ***No single pathway out of homelessness*** – maximizes all available resources
- ***Leverage the resources you have*** – effective prioritization requires CES to know anticipated availability of CoC resources within a certain timeframe (e.g., 60 days) to facilitate rapid movement for those with highest needs



# Using Dynamic Prioritization for Referral

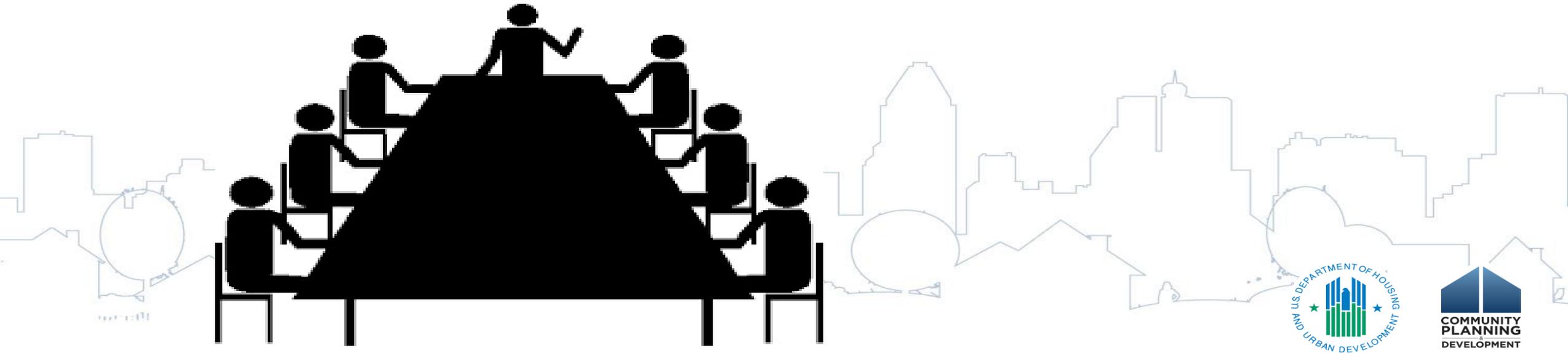
When there is a vacancy, the CoC uses all available information to:

- identify the person with the highest needs at that point-in-time in the prioritized group
- determine if referral is appropriate based on household needs, preferences and considers their eligibility for the program

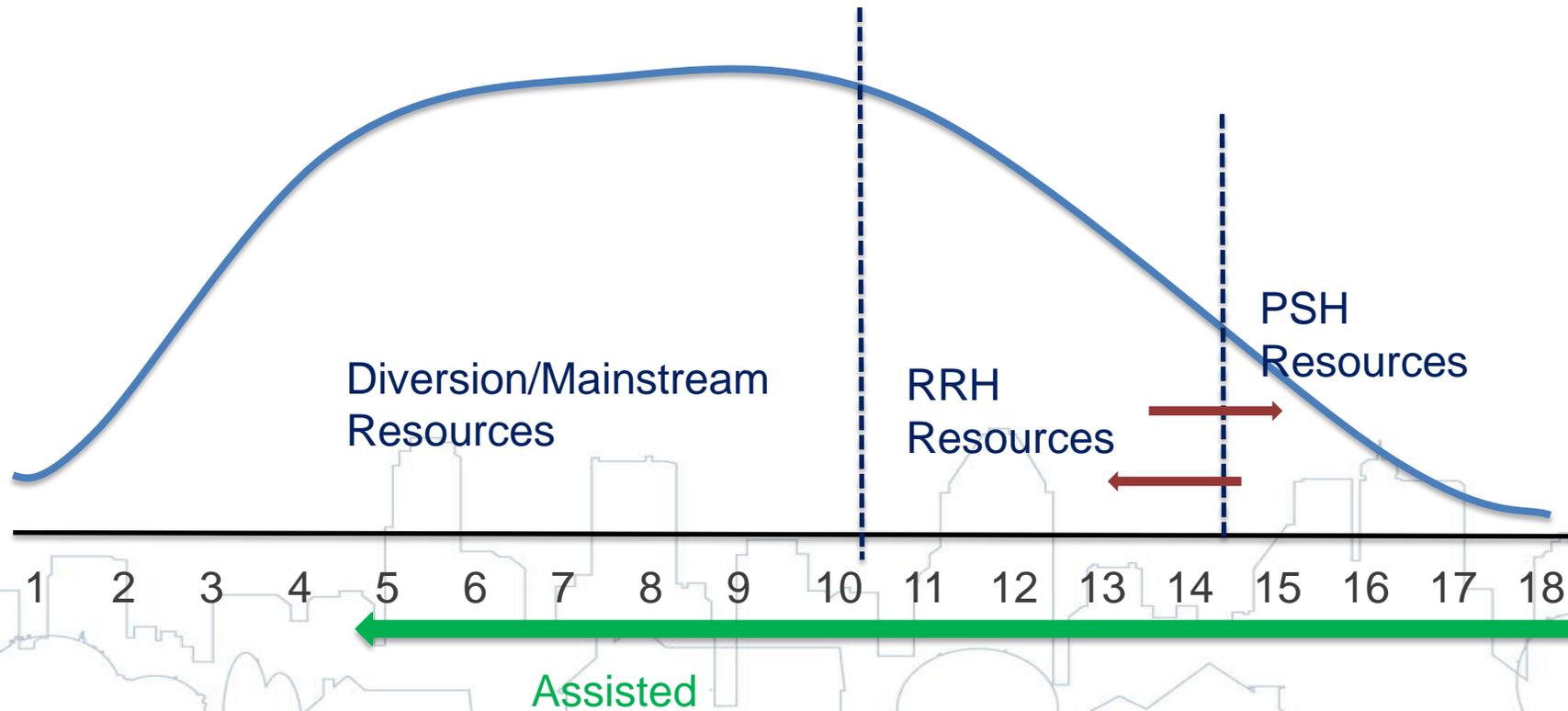


# Dynamic Prioritization and Case Conferencing

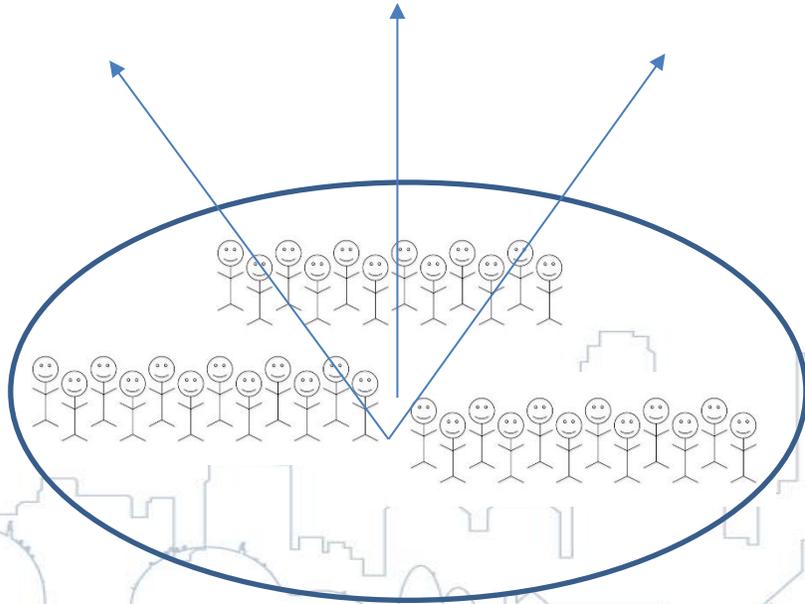
- Prioritization can't always be entirely automated
- **Case conferencing** allows for human element
- Transparent decision-making to fill vacancies using current information about persons in the prioritized group



# Result of Dynamic Prioritization



# Dynamic Prioritization



Prioritized Group

## Use case conferencing to discuss:

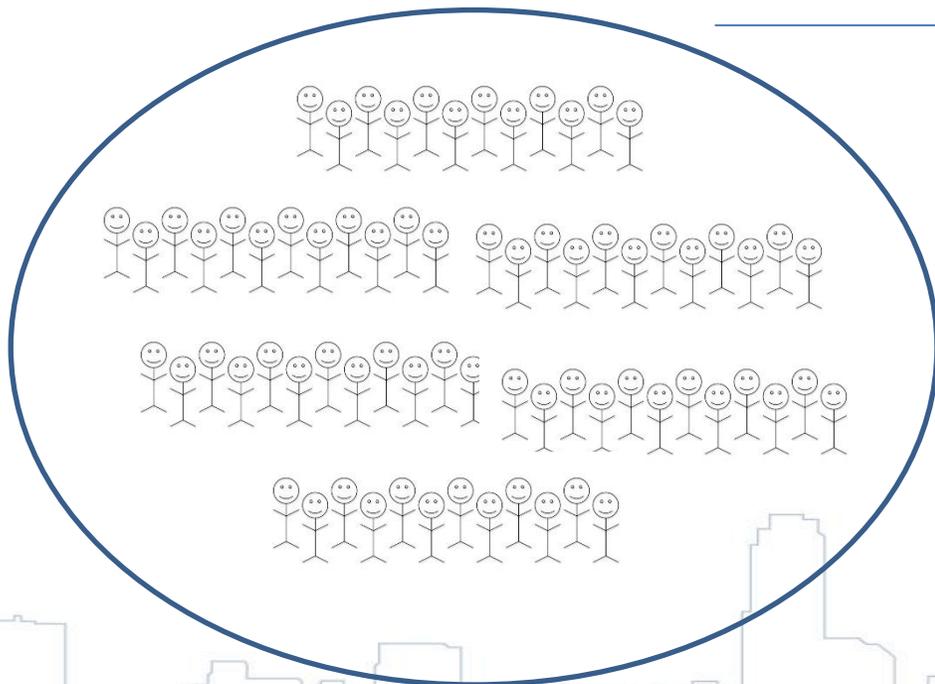
- What is vacant?
- Who is 'ready'?
- Of those 'ready', who is highest need and eligible for vacancy?
- If multiple openings, make best referrals possible considering needs and client choice
- Follow up on what happened to last set of referrals

# What about those who are not prioritized?

- Dynamic prioritization should not mean that those who are not prioritized for referral are simply ignored
- Although not prioritized for a system intervention, these households should be offered
  - ✓ problem-solving,
  - ✓ diversion,
  - ✓ help with self-resolution
  - ✓ referrals and supports to use mainstream services
  - ✓ Shared housing, family reunification, flexible housing accommodations

# Dynamic Prioritization

## Non-Prioritized Group



S  
H  
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L  
T  
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R

→ Diversion attempted before shelter entry

→ Continue self-resolution strategies

→ No assessment until in shelter for at least XX days; no promise of future assistance besides continued diversion attempts

→ After set number of days in shelter, consider lightest touch progressive engagement

# Key Components of Dynamic Prioritization

- Adjust the size of the prioritized group to the available inventory
- Account for changes in people's situations or in information available
- Organize CE decisions closer to “real time” rather than managing lists and trying to locate and find people “when their name comes up”
- Encourage the use of diversion/problem solving strategies and connection to mainstream resources for everyone else



# Should your CoC consider Dynamic Prioritization?

- Any community that has more persons experiencing homelessness than there are available resources could benefit from adopting prioritization policies that are dynamic, especially if the following are true:
  - Many people who are referred to an opening are not eligible
  - High priority people wait longer than 90 days for a referral to less available resource
  - Your HUD system performance measures, particularly on lengths of time homeless and on exits to permanent housing, are not improving



# What's Needed to Implement Dynamic Prioritization?

An analysis of your overall homeless population

- **Demand** – Review PIT and HMIS data to project anticipated inflow by subpopulation to understand actual need within CoC

An analysis of your available inventory and turnover rate in programs within a defined period

- **Supply** – Review HIC and HMIS data to understand asset inventory and turnover rate to understand how many people the CoC will be able to house each month



# Determining *who* will be prioritized

The CoC will need to determine what factors will be considered for prioritization *based on* analysis of population data

The CoC should specifically look at:

- Extent of unsheltered homelessness
- Extent of chronic homelessness
- Rate of recidivism
- Length of time homeless



# Establishing the Prioritized Group

Once the CoC has determined *who* will be prioritized among all others, the CoC will look at available resources

- Size the priority group or cohort based on how many housing placements are likely in the next 60 or 90 days
- Include some cushion to account for the fact that some people in the cohort will self-resolve or disappear
- Refresh pool frequently; but don't spend inordinate staff time maintaining pool of people who are unlikely to be assisted



# Prioritize Across All Resources—Not by Intervention Type

PSH is typically the least available resource

- Chronically homeless persons should continue to be prioritized
- PSH stock should be flexible (dedicated, non-dedicated, Dedicated*Plus*) to ensure access for persons that do not meet HUD CH definition

RRH should be the most flexible available intervention that can accommodate persons with higher needs

- Provide RRH as an alternative for persons experiencing CH when PSH resources not immediately available—use RRH as a bridge
- A progressive engagement model may be ideal when dynamically prioritizing
- Develop a range of RRH intensity and duration options



# Dynamic Prioritization Requires a Shift in Thinking

- Policies and procedures should clearly address how the CES will work with the households that are not in the prioritized group to identify an alternative solution
  - Diversion strategies that help households seeking assistance to self-resolve are critical
  - Use phased assessment
  - Do not assume that there is a single pathway out of homelessness; case management to help persons self-resolve should continue after shelter entry



# Going from Static to Dynamic Prioritization Practices

- ✓ Document your decision process and use your data to see if the results are what you anticipated
- ✓ Examples of how to look at your data:
  - Do people we have identified as highest need secure housing? How quickly? Is our priority group list the right length?
- ✓ Always ask the question, “who is getting stuck and why?”
- ✓ Create policies and procedures for how the CE will assist persons that are not going to be prioritized; in many communities this will be a larger group—at least initially—than the prioritized pool
  - This will likely require some thought around staffing

