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d. List(s) quickly become out of date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

1. Initial Triage
2. Diversion
3. Intake
4. Initial Assessment
5. Potential Eligibility Assessment
6. Comprehensive Assessment

Diagram showing the 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.
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

Resources
Results of Static Prioritization

- Assisted
- Not Assisted

- Assisted
- Not Assisted

- Assisted
- Not Assisted
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.
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

Diversion/Mainstream Resources

RRH Resources

PSH Resources

Assisted
Dynamic Prioritization

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

- 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, DedicatedPlus) 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.