

CoC Self-Assessment Tool

The intent of this self-assessment is for the agency to honestly evaluate the current state of their own organization in several key areas such as participation in coordinated entry, verification of chronic homelessness, utilization of data, and services provided. The information will be used by the agency and CHSP to generate a technical assistance (TA) plan that will be an effective resource for the agency. Possible types of technical assistance that could be included in the plan are as follows: referrals to workshop or training opportunities, sample tools or templates, HMIS guidance, and referrals to articles and outside experts.

The estimated time it may take to complete this survey is 30 minutes, although this will likely vary from agency to agency. Generally speaking, the more time invested in completing the self-assessment and reflecting on responses, the more you can receive from the process in terms of a responsive and helpful TA plan. Due to the range of topics covered in the self-assessment, more than one staff person may be needed to complete the form so it is recommended to review the list of sections and plan accordingly.

Each agency that is monitored will complete one survey. Most of the questions relate to agency-level practices, but some are project-specific. For agencies with only one project, please write 'not applicable' in the appropriate fields.

The deadline for submission is day 15 of the monitoring window. During the on-site client file review, which occurs between days 20-35, 30 minutes will be set aside for agency staff and CHSP staff to address any questions or clarifications regarding the self-assessment submission. A conference call is scheduled between days 37-40 to discuss the self-assessment and the monitoring report. During the call there will also be time to develop a technical assistance (TA) plan. TA activities can be scheduled for immediate revision or for future dates as necessary.

* Required

Coordinated Entry

1. This project utilizes the Coordinated Entry System (CES) to fill all unit openings: (Multiple projects: select all that apply) *

Check all that apply.

- 100% of the time
- 90% - 99% of the time
- 80% - 89% of the time
- Less than 80% of the time

2. For those with multiple projects, please clarify the percentages for each project here: *

3. Please explain any barriers that prevent the agency from utilizing CARS for openings 100% of the time. *

4. Upon receiving referrals, which tools does the agency use to locate the client: (select all that apply) *

Check all that apply.

- Reaching out to current providers the client is enrolled with
- Reaching out to client's alternate contact
- Reaching out to the client via means other than phone and email

Other: _____

5. What percentage of matches are declined by the participant or rejected by your program? (Multiple projects: select all that apply) *

Check all that apply.

- 100%
- 90% - 99%
- 80% - 89%
- Less than 80%

6. For those with multiple projects, please clarify the percentages for each project here: *

7. Please explain the most common reasons for match refusals. *

8. Please rate how well the agency adheres to the standard of updating needs status within 3 days of receiving initial match. *

Mark only one oval.

- Very well (i.e., this always occurs)
- Average (i.e., this occurs regularly but not always)
- Low (i.e., this does not occur frequently)

9. Please rate how well the agency adheres to the standard of updating the needs status once the referred participant is deemed eligible or ineligible for the program. *

Mark only one oval.

- Very well (i.e., this always occurs)
- Average (i.e., this occurs regularly but not always)
- Low (i.e., this does not occur frequently)

10. Please answer Yes or No to the following questions: *

Mark only one oval per row.

	Yes	No	Not Applicable
We are aware of how and when to request a transfer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We are aware of how and when to request a bridge unit (PSH projects only)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. If you would like to make any technical assistance requests related to coordinated entry, please explain. *

Homeless and Chronic Homeless Definitions/Record-keeping

12. Please rate the overall level of staff knowledge on the homeless definition as written in the HEARTH Act. *

Mark only one oval.

- Very good (i.e., staff understand the definition and rarely need to seek help from others)
- Average (i.e., staff understand some parts of the definition but often have questions)
- Low (i.e., staff have a high need for additional training)

13. Please rate the level of staff knowledge on the protocols for documenting homelessness (for programs that serve participants who are not chronically homeless). *

Mark only one oval.

- Very good (i.e., staff understand the criteria for acceptable documentation and rarely need to seek help from others)
- Average (i.e., staff understand some parts of the criteria for acceptable documentation but often have questions)
- Low (i.e., staff have a high need for additional training)
- N/A (i.e., staff work in program(s) that only serve participants meeting the chronic homeless definition)

14. Please rate the overall level of staff knowledge on the definition of chronic homelessness. *

Mark only one oval.

- Very good (i.e., staff understand the definition and rarely need to seek help from others)
- Average (i.e., staff understand some parts of the definition but often have questions)
- Low (i.e., staff have a high need for additional training)

15. Please rate the overall performance of staff on collecting information and answering the chronic homeless determination questions accurately. *

Mark only one oval.

- Very good (i.e., staff apply the definition accurately a high percentage of the time)
- Average (i.e., staff sometimes have difficulty applying the definition accurately)
- Low (i.e., staff have a high need for additional training)

16. Please rate the level of staff knowledge on the protocols for verifying chronic homelessness. *

Mark only one oval.

- Very good (i.e., staff understand how to obtain verification, the time frames for verification, and rarely need to seek help from others)
- Average (i.e., staff understand some parts of the verification process but often have questions)
- Low (i.e., staff have a high need for additional training)
- N/A (i.e., staff work in a program that is not required to verify chronic homelessness)
- Option 2

17. This project ensures all new participants meet the definition of chronic homelessness, if applicable: (Multiple projects: select all that apply) *

Check all that apply.

- 100% of the time
- 90% - 99% of the time
- 80% - 89% of the time
- Less than 80% of the time
- Not applicable

18. For those with multiple projects, please clarify the percentages for each project here: *

19. Tools this agency uses in the process to verify chronic homelessness include: (select all that apply) *

Check all that apply.

- HUD's Chronic Homelessness Flow Chart
- CHSP's Chronic Homelessness Verification Form
- Training on the chronic homeless definition

Other: _____

20. If you would like to make any technical assistance requests related to the homeless or chronic homeless definitions or record-keeping requirements, please explain. *

Enrollment

21. Does the agency have any questions about who can be served in any of its projects? *

22. To what extent do you agree or disagree with the following statement: This agency expedites the admission process to the greatest extent possible and makes it person-centered and flexible. *

Mark only one oval.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

23. In practice, how well do you feel this agency eliminates barriers to entry (i.e., screening in versus screening out)? *

Mark only one oval.

- Very strong
- Strong
- Average
- Weak
- Very weak

24. If you would like to make any technical assistance requests related to enrollment, please explain. *

Housing Please rate the agency on the following questions using a scale from 1 to 5, where 1 is the lowest and 5 is the highest.

25. How would you rate the agency in promoting participant choice in housing? *

Mark only one oval.

	1	2	3	4	5	
Lowest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highest

26. How would you rate the agency in providing education to participants about their lease or occupancy agreement terms? *

Mark only one oval.

	1	2	3	4	5	
Lowest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highest

27. How would you rate the agency in helping participants build relationships and connections to their community (to help foster housing stability)? *

Mark only one oval.

	1	2	3	4	5	
Lowest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Highest

28. Please explain any high or low ratings in the previous three questions. *

29. How does the agency inform participants of the right to request reasonable accommodations related to disabilities? *

30. What kind of support may participants expect from program staff in their search for housing? Select all that apply. *

Check all that apply.

Participants do not have a choice of units because the project has established buildings or units

Staff locate potential units for participants

Participants receive help from dedicated housing department staff

Participants locate their own units

Participants have access to a computer lab for housing research

Staff counsel or train participants on methods to use in the housing search process (such as websites to visit, etc.)

Staff prepare or support participants in meeting and interviewing with landlords

Other: _____

31. If you would like to make any technical assistance requests related to housing, please explain. *

Eviction Prevention

32. Tools this agency uses to help participants avoid eviction include: (select all that apply) *

Check all that apply.

- Relocation to another unit
- An in-house Eviction Prevention program
- Regular meetings involving property management and clinical services staff
- Assisting tenants with obtaining a payee
- Offering multiple payment plan options to tenants
- Transfers to another program/agency when necessary to avoid eviction

Other: _____

33. How often does a participant at this agency lose their housing due to not making rent payments? *

Mark only one oval.

- At least once a month
- At least once every two months
- At least once every three months
- At least once every six months
- At least once a year
- Less than once a year or never

34. In cases where all efforts to avoid eviction are unsuccessful, please share the most common reasons that participants are evicted. *

35. If you would like to make any technical assistance requests related to eviction prevention, please explain. *

Data Collection/Quality and Performance Improvement

36. Does your agency have an internal process for on-boarding new employees into HMIS (i.e., helping them understand who the ATA is, what project types they need to be trained on, how to sign up for training, etc.) *

Mark only one oval.

Yes

No

37. Does your agency have a system preserving institutional knowledge of your internal HMIS procedures? *

Mark only one oval.

Yes

No

38. What personnel primarily enters participant universal data elements in HMIS?
(select all that apply) *

Check all that apply.

- Agency Technical Administrator (ATA)
- Program Managers
- Supervisors
- Case Managers
- Interns or Temporary Staff

Other: _____

39. Once a participant is entered into HMIS and the universal data elements are completed, what personnel primarily maintains the record in HMIS (i.e., such as entering client level updates)? Select all that apply. *

Check all that apply.

- Agency Technical Administrator (ATA)
- Program Managers
- Supervisors
- Case Managers
- Interns or Temporary Staff

Other: _____

40. How many databases does this agency input program/service-related participant data into? Does the agency experience any challenges related to data accuracy or timely data input stemming from multiple database usage? *

41. How often does this agency utilize the HMIS Help Desk: (select one) *

Mark only one oval.

- Daily
- Weekly
- Monthly
- Other: _____

42. What does the agency most frequently use the HMIS Help Desk for? *

43. How often does this agency review participant data and evaluate outcomes: (select one) *

Mark only one oval.

- Monthly
- Quarterly
- Bi-annually
- Annually
- Other: _____

44. Please explain any ways in which this agency utilizes HMIS data in program planning. *

45. If you would like to make any technical assistance requests related to data collection/quality and performance improvement, please explain: *

Staff Development and Training

46. In what content area(s) is there the greatest need for staff training or development at this agency? *

47. If you would like to make any technical assistance requests related to staff development and training, please explain: *

Policies and Procedures

48. This agency has Human Resource policies in place regarding the following: (select all that apply) *

Check all that apply.

- Sexual harrassment
- Non-discrimination
- Whistle blower
- Employee code of conduct
- Employee grievance procedures
- Confidentiality
- Conflict of interest
- Explanation of employee benefits
- Employee expectations
- Safety/evacuation procedures

49. Please explain the methods used by the agency to inform and/or train employees on the policies mentioned above. *

50. Please rate the agency on the Violence Against Women Act (VAWA) implementation. *

Mark only one oval.

- Very good (i.e., agency understands VAWA requirements and has procedures and forms)
- Average (i.e., agency understands VAWA requirements but there is progress to be made)
- Low (i.e., agency has a high need for assistance related to VAWA requirements)

51. If you would like to make any technical assistance requests related to policies and procedures, please explain: *

Service Provision

52. Supportive services at our agency: (select all that apply) *

Check all that apply.

- Are voluntary and are not a requirement for tenancy
- Focuses on helping tenants create a plan for obtaining or maintaining housing
- Are developmentally appropriate for youth needs
- Are developmentally appropriate for family needs
- Take safety into account when orienting new clients
- Incorporate conversations about harm reduction when talking about tenant behavior
- Utilize the goal planning process to review and set short-term goals
- Utilize the goal planning process to review and set long-term goals
- Review and update goal plans annually
- Review and update goal plans every six weeks
- Review and update goal plans quarterly
- Review and update goal plans monthly

53. How do agency staff engage with SOAR to help connect individuals with cash benefits? *

54. How do agency staff connect participants to employment or workforce development opportunities? *

55. What is the typical caseload ratio? (For multiple projects, please list the ratios for each.) *

56. What strategies does the agency use to encourage participation in services without making participation a requirement? *

57. If you would like to make any technical assistance requests related to service provision, please explain: *

Grant Management

58. The agency has a tracking system in place that tracks the following: (select all that apply) *

Check all that apply.

- Technical submission
- Grant agreement
- Development activities
- Start of operations
- End of operations
- Amendments
- Renewal
- APR deadlines
- Audits/monitoring

59. What practices does the program utilize to monitor spending and identify ways to spend funds in order to avoid unnecessary recapture of funds? *

60. If you would like to make any technical assistance requests related to technical assistance, please explain: *

General Summary Questions

61. Please identify whether the agency would like to request any additional feedback or technical assistance related to areas that were flagged as "pass with findings" in the Intent to Renew. *

62. Please identify whether the agency would like to request any technical assistance related to questions in which low scores were received in the Local Evaluation. *

63. What assistance or guidance would help the agency improve in any of the areas covered in this self-assessment? For areas in which you would like assistance, what is the highest priority for you at this time? *

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