

## Coordinated Assessment Action Plan Checklist

- Decide which group is charged with leading the development of the coordinated access system.** Assembling a small group to make decisions and take action will move the conversation from the backroom to the front door.
- Identify implementation steps based on an established “Go Live” date.** Setting a date establishes urgency. It is important, however, to make sure that the “Go Live” date is sufficiently realistic so as not to have the reverse effect of paralyzing champions and disillusioning those less committed.
- Compile a detailed list of homelessness projects, referral agencies, and mainstream programs whose cooperation is required.** Refer to the community analysis of stakeholders and compile your findings into an organized list of providers and their respective target populations, program dynamics, facility and bed capacities, locations, and contact information. The list will help the leadership refine the implementation and development strategy. It can also provide the basis for the creation of a working referral database.
- Create a report of client demographics, system inventory, and utilization patterns.** Refer to the community analysis of client demographics, inventory, and utilization to create an organized report of your current client base and physical resources.
- Create a report of current access, assessment, and referral client flow.** Refer to the analysis of the current assessment system’s client flow and draft a detailed flow chart. The flow chart will be of great use to the leadership.
- Create a report of current access, assessment, and referral data entry and operations work flow.** Refer to the analysis of the current assessment system’s work flow and draft a detailed flow chart. The flow chart will be of great use to the governance committee.
- Define guiding principles and shared values.** Guiding principles and shared values will be unique to each community and will emerge from one-on-one conversations between stakeholders, from small-group meetings, and from CoC-wide conversations.
- Identify the coordinated assessment structure and location (if applicable).** Define the access and assessment structure. Agreement on the structure and location of the process will then allow the group to focus on important details that are heavily reliant on the number of locations, the type of managers at each location, and the types of co-located services.
- Establish clear system participation expectations for all CoC providers.** Refer to the decisions made regarding access, assessment, and referral and the work flow that each partner will be required to follow. Agree to and record a detailed policy that as many parties as possible may sign immediately. Remember – all CoC and ESG funded recipients and subrecipients must use the coordinated assessment system.

- Develop a community plan with mainstream providers.** Refer to the analysis of community stakeholders, the relationships between/among mainstream providers, and the decisions regarding connections to mainstream services. The act of drafting a community plan with mainstream providers will encourage community buy-in and participation, enrich the possibilities for collaborations, and support the overall efficiency gains of a coordinated assessment system.
- Determine the role of HMIS and data systems in management, monitoring, and evaluation.** As mentioned, the more open and efficient data systems operation, the more efficiently the coordinated assessment system will operate. Create an ideal flow chart of how data will move from one step of the process to the next and then map the types of systems currently used and the systems that will need to be augmented or changed. HMIS may be a major part of a system; therefore, it may be important to include the HMIS provider in these discussions as well as the provider of any other central data system currently in use. Finally, convert the map and flowchart into a data management policy for endorsement by the governance committee.
- Develop a coordinated assessment–specific financial plan.** A coordinated assessment system promises significant long-term cost savings; however, there are upfront costs to consider. Financial plans will be highly localized and will depend on existing resources, committed private funders, and HUD funding of the CoC and ESG programs, among other factors. It is important that coordinated intake is considered one of many interventions in a community’s united effort to prevent and end homelessness. Costs should be considered with the entire CoC in mind, particularly as costs relate to HUD resources, and should be considered when discussing ESG allocations, CoC program applications, CoC reallocation processes, CoC planning dollars, CoC committee dues, CoC State and local funding, and other CoC-wide funding sources. Draft and approve a formal plan with the consent of the governance committee and of as many stakeholders as possible.
- Develop a monitoring and evaluation plan.** Developing a monitoring and evaluation plan will go a long way to meeting stakeholder demands for transparency. Detail a plan that the governance committee can endorse. Make sure to plan for upfront, short-term monitoring and evaluation, which will decline in frequency with project maturity.
- Identify a managing body for the assessment process.** Refer to the analysis of the community’s authority environment. Reach an agreement with the leadership regarding the agency, group, or committee charged with managing the assessment process. That body will be responsible for all future referrals and referral reconciliations and should be an entity that has earned the community’s respect and trust.
- Create a resource development strategy.** The community analysis identified current resources, needed resources, and resources in need of further development. Formally articulate a plan to acquire and develop resources, particularly the human resources needed to carry out access interviews and assessments, make referrals, operate new data systems, and monitor and evaluate the coordinated assessment system.
- Develop access, assessment, and referral policies and procedures manual as a staff resource.** Develop a model for all of the steps from initial client interaction through post-referral follow-up and all of the various scenarios along the way. Identify potential areas of

conflict between/among organizations and outline a process for conflict resolution. In the event of a case counseling model, explain the process in detail. Compile policies and procedures into a staff-oriented manual or guidebook that can be used as a training tool and reference for on-the-job challenges.

- Identify and train access, assessment, and referral staff.** Identify and train staff by using the staff policy and procedure guidebook. Staff members will be charged with turning the idea of a coordinated assessment system into reality. Therefore, they must be well trained in the CoC's intent and goals for the coordinated access system, as well as in all of the specific policies and procedures developed to operationalize the selected access model and all associated data systems. Have procedures in place for continued training on the system.
- Develop a public communication plan and promotional material.** Identify where clients currently seek services and where the community at large learns about new projects. Develop a plan that leverages existing communication networks and conveys a consistent message about system access across several channels. Given the likelihood that several agencies and mainstream providers will be involved in the coordinated assessment system, it will be important to include such participants in the plan's development. Formal and informal networks should be leveraged, just so long as people know how to access the system for themselves or for someone in need.
- Begin implementation.**