

## 2017 Program Review and Certification Standards

### G. Services Planning

**New requirements are in red text and do not apply for the 2017 PR&C review. These requirements will be applicable in 2018.**

**Minor adjustments and clarifications and changes to Tiers are in green text. These changes are applicable for the 2017 PR&C review.**

**Blue text describes how the revised 2017 standards correlate with the 2016 standards.**

Removed 3 standards

Standard G1	Guideline G1	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Agency staff develops individualized housing stabilization plans (IHSPs) with clients based on the initial client assessment within 5 business days of program entry. IHSPs are signed by program staff and the client and should include the following: (1) Specific goals and actions to address housing barriers (tenant screening and/or housing retention barriers), and other critical service needs; (2) Client, program staff, or community agency responsibility	<input type="checkbox"/> IHSPs clearly document client housing goals and the actions necessary to address housing barriers and other critical service needs.  <input type="checkbox"/> IHSPs include actions to access services/supports in the community that clients need and desire.  <input type="checkbox"/> Agency staff can describe the process for developing IHSPs based on a housing barriers and service needs assessment completed with clients, as well as how clients are actively engaged in creating their IHSP.  <input type="checkbox"/> Agency staff can describe the process for engaging clients in creating achievable, time-bound IHSPs upon program entry,	<input type="checkbox"/> <u>File Review</u> : CSB reviewed client files.  <input type="checkbox"/> <u>Discussion</u> : CSB discussed with agency staff.	<input type="checkbox"/> Compliant  <input type="checkbox"/> Compliant with conditions  <input type="checkbox"/> Non-compliant  <input type="checkbox"/> N/A		1	Family Shelters, RRH/ Navigator, Navigator, PSH, TH, Single Adult Shelters

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<p>for each step;  (3) Timeframes for completion of each step;  (4) Services and supports to be provided and by whom;  (5) Desired permanent housing and critical service need outcome(s).</p> <p>Agency staff assesses clients on an ongoing basis during their enrollment in the program. Agency staff updates IHSPs with the client as needed, taking into account progress, goal obtainment, and changing needs.</p> <p>Formerly standards G1, G2, G6, and G7.</p>	<p>including with clients who have experienced multiple shelter stays, long-term homelessness, and/or disabilities.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Agency staff can describe how services are delivered in an individualized manner, beginning with an initial housing barrier and service needs assessment used to develop an initial IHSP.</li> <li><input type="checkbox"/> Housing barrier assessment and IHSP development should be a top priority when clients enter shelter. There is evidence that clients receive an initial IHSP within 5 business days of entry or per timeframes established for the program and approved by CSB.</li> <li><input type="checkbox"/> PSH clients should have an IHSP that addresses ongoing or likely housing retention barriers. IHSPs are periodically updated and may address goals and actions toward more independent housing (i.e., successful move-on from PSH).</li> <li><input type="checkbox"/> Agency staff use IHSP planning tools and there is evidence that IHSPs address housing barriers</li> </ul>					
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	<p>and related income and critical service needs.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> IHSPs are signed by program staff and clients. A copy of the signed IHSP is available for review in each client file.</li> <li><input type="checkbox"/> Agency staff updates IHSPs with clients as circumstances or needs change.</li> <li><input type="checkbox"/> Program management staff regularly monitors implementation of assessment and IHSP procedures.</li> </ul>					
Discussion and Basis for Conclusion						

Standard G2	Guideline G2	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Client files include up-to-date case notes that record client and service provider contacts and client progress toward	<input type="checkbox"/> Case notes are concise, factual, relevant, and legible. Case notes include details of client progress toward IHSP goals and delineate client outcomes, including housing stabilization once clients move into	<input type="checkbox"/> <u>File Review</u> : CSB reviewed client files.  <input type="checkbox"/> <u>Discussion</u> : CSB discussed with agency staff.	<input type="checkbox"/> Compliant  <input type="checkbox"/> Compliant with conditions		1	All programs except CPOA / Homeless Hotline

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<p>obtaining and, where applicable, maintaining permanent housing.</p> <p>Formerly standards G1 and G2.</p>	<p>housing.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> All shelter advocates/navigators provide a weekly note in each client file stating progress towards housing goals.</li> <li><input type="checkbox"/> Single adult shelter staff provides 1-2 sentences documented in a case note/activity log regarding staff interactions with residents in individual shelter charts for every 7 calendar days an individual is in shelter. One can be the "Shelter Welcome" form or a note around assisting the client in coordinating a meeting with his/her Navigator.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Non-compliant</li> <li><input type="checkbox"/> N/A</li> </ul>			
<p><b>Discussion and Basis for Conclusion</b></p>						

Standard G3	Guideline G3	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
The program screens and makes referrals to appropriate supportive service and mainstream benefits	<ul style="list-style-type: none"> <li><input type="checkbox"/> The agency makes referrals to places that provide assistance with public assistance and benefits (such as Ohio Works First, Healthy Start, WIC, Public</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Discussion:</u> CSB ensured that the agency is registered with OBB.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Compliant</li> <li><input type="checkbox"/> Compliant with conditions</li> </ul>		1	PSH, TH, RRH/ Navigator, Navigator

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<p>providers relevant to addressing client housing barriers and/or critical service needs. At least one member of the program staff (TH and PSH only) is certified by the Ohio Benefits Bank (OBB) to help clients determine eligibility and complete benefit applications.</p> <p style="color: blue;">Formerly standard G4.</p>	<p>Child Care, Head Start, food stamps, Medicaid, Medicare, SSI, SSDI, etc.).</p> <p><input type="checkbox"/> <b>Other services include, but are not limited to: legal services; mediation services; employment search and retention; education and training; behavioral and physical health care services and treatment programs; transportation services; material assistance programs; adult/children's protective services; and basic financial planning.</b></p> <p><input type="checkbox"/> Agency staff is trained to use OBB and can describe how staff links clients to services.</p> <p><input type="checkbox"/> Agency staff can produce documentation of registration as an OBB site and documentation that clients routinely use this service.</p>	<p><input type="checkbox"/> <u>Discussion:</u> Agency staff explained the policy regarding service referrals.</p>	<p><input type="checkbox"/> Non-compliant</p> <p><input type="checkbox"/> N/A</p>			
<p><b>Discussion and Basis for Conclusion</b></p>						

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Standard G4	Guideline G4	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
<p>Programs complete the CSB Vulnerability Assessment form within 5 business days from entry into the program. Agency staff assesses and updates client barriers and disabilities at least every 6 months, including for persons served by Outreach programs. Housing programs use the CSB Vulnerability Assessment as part of the housing prioritization process managed through USHS.</p> <p>Formerly standard G7.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Agency staff can describe the process used to engage clients upon entry, including completion of the Vulnerability Assessment form no later than 5 business days from entry.</li> <li><input type="checkbox"/> A copy of the Vulnerability Assessment is available in each client file.</li> <li><input type="checkbox"/> A copy of the Vulnerability Assessment form is forwarded to Rapid Rehousing / Navigator and transitional housing providers.</li> <li><input type="checkbox"/> If the client has experienced either a long-term stay or movement through the system, there is evidence that the current provider has consulted and updated the Vulnerability Assessment every 6 months.</li> <li><input type="checkbox"/> It is recommended, but not required, that agency staff update the Vulnerability Assessment with each shelter,</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>File Review</u>: CSB reviewed client files.</li> <li><input type="checkbox"/> <u>Discussion</u>: Agency staff explained methods used to engage clients in a timely manner.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Compliant</li> <li><input type="checkbox"/> Compliant with conditions</li> <li><input type="checkbox"/> Non-compliant</li> <li><input type="checkbox"/> N/A</li> </ul>		1	TH, Navigator, RRH/ Navigator, Family Shelters, Outreach, Front Door

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	Rapid Rehousing/Navigator, or transitional housing stay.  <input type="checkbox"/> Housing programs demonstrate an up-to-date Vulnerability Assessment in the client files as part of the client eligibility documentation.					
<b>Discussion and Basis for Conclusion</b>						

- \* CSB staff signature for Tier 1 (annually) and Tier 2 (every 4 years)
- \* Agency staff signature for Tier 2 (when not reviewed by CSB) and Tier 3 (annually)

CSB reviews Tier 2 standards every 4 years. For years when CSB does not review Tier 2 standards, agency staff certifies compliance with both Tier 2 and Tier 3 standards in the 'Certifying Official' column.

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