Program Review and Certification Standards
G. Services Planning

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 and needs. IHSPs are signed by the program or service provider staff and client and may include the following: (1) Service, income and housing goals and specific steps to achieve each goal; (2) Client, program staff or community agency role or responsibility for each step; (3) Timeframes for completion of each step; (4) Services and supports to be provided and by whom; (5) Desired outcomes.	☐ IHSPs document staff assisting clients achieving service, income and housing goals, help clients access needed services/supports in the community, teach problem solving skills, and promote client self-sufficiency. ☐ Agency staff can describe IHSP planning procedures and content. ☐ Agency staff use IHSP planning tools and there is evidence that IHSPs address service, income, and housing needs. IHSPs are signed by program staff and clients. ☐ The program design includes a plan to measurably assist tenants in recovery and achieving greater wellness. ☐ There is evidence that agency staff updates IHSPs as circumstances or client needs change. ☐ Program management staff regularly monitors implementation	☐ CSB discussed with agency staff and reviewed client files.	☐ Compliant ☐ Compliant with conditions ☐ Non-compliant ☐ N/A		1	All programs

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Agency staff assesses clients on an ongoing basis during their enrollment in the program. Agency staff maintains and updates IHSPs with the client as needed, taking into account client progress, goal obtainment, and changing or emerging service level needs.	of the IHSP procedure. ☐ Up-to-date case files record client or service provider contacts and client progress. ☐ Case notes are concise, factual, relevant and legible. Case notes include details of client progress toward IHSP goals and delineate client outcomes, including addresses when clients move into housing. ☐ All shelter advocates/navigators provide a weekly note in each client file stating progress towards housing related goals. ☐ Agency staff must document any variation to this guideline in the client's IHSP and appropriately reflect client service level need. ☐ Single adult shelters must provide one or two sentences documented by shelter staff on a case note/activity log regarding staff's interactions with the resident in his/her individual shelter chart for every 7 calendar days an individual is in shelter. One can be the				

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	"Shelter Welcome" form or a note around assisting the client in coordinating a meeting with his/her navigator.					

Discussion and Basis for Conclusion

Standard G2	Guideline G2	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Programs identify and provide individualized service and housing planning assistance to all clients within 5 business days from entry into the emergency shelter or Rapid Rehousing/Navigator programs.	☐ Agency staff can describe the criteria and process used to identify and provide assistance to clients upon entry into the emergency shelter system or Rapid Rehousing/Navigator programs, including clients who have experienced multiple shelter stays, long-term homelessness, are disabled, and/or have other special needs. ☐ The program can describe how services are delivered in an individual manner, beginning with the development of an IHSP (e.g. individual clients	☐ Agency staff explained how IHSPs are created and tailored to client needs. ☐ CSB reviewed client files.	☐ Compliant ☐ Compliant with conditions ☐ Non-compliant ☐ N/A		1	Navigator, RRH/ Navigator, First time homeless, Family Shelters

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	actively participate in developing their IHSP and services are tailored to individual needs).				
	☐ The development of a client's IHSP should be a top priority when clients enter the shelter, and there is evidence that clients receive their IHSP within 5 business days from entry.				
	☐ A copy of the IHSP, signed by the client, is available for review in each client file.				

Discussion and Basis for Conclusion

The program type changed on this standard to add First time homeless and remove Front Door.

Standard G3	Guideline G3	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Agency staff maintains up-to-date housing and employment information and	☐ There is evidence that agency staff maintains up-to-date housing and employment information and referral resources.	☐ CSB discussed with agency staff how information is kept up-to-	☐ Compliant ☐ Compliant with		1	All programs

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referral resources to assist clients in meeting income and housing goals. Supportive housing programs identify and assist tenants who are willing and able to move to and maintain more independent housing.	☐ Agency staff can describe how information is kept up-to-date. ☐ For supportive housing, agency staff can describe how staff periodically assesses tenants and facilitates moves to more independent housing.	date. ☐ Agency staff described how tenants are periodically assessed and how moves are facilitated.	conditions ☐ Non-compliant ☐ N/A			
Discussion and Basis for Conclusion						

Standard G4	Guideline G4	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
The program will encourage and make referrals to appropriate supportive service providers. At least one member of the program staff is certified by the Ohio Benefits Bank (OBB) to help clients determine eligibility and complete applications	☐ The agency makes referrals to places that provide assistance with public assistance and benefits (such as Ohio Works First, Healthy Start, WIC, Public Child Care, Head Start, food stamps, Medicaid, Medicare, SSI, SSDI, etc.). ☐ Other services include, but are not limited to: employment	☐ CSB ensured that the agency is registered with OBB. ☐ Agency staff explained the policy regarding service referrals.	☐ Compliant ☐ Compliant with conditions ☐ Non-compliant ☐ N/A		1	PSH, TH, Navigator, RRH/ Navigator, Prevention, Family Shelters, CPOA/ Homeless Hotline for

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for benefits.	opportunities, education and training; medical, health care and mental health services; transportation services; alcohol and drug treatment programs; assistance to secure long-term housing; material assistance programs; adult/children's protective services; and basic financial planning. ☐ Agency staff is trained to use OBB and can describe how staff links clients to necessary supportive services. ☐ Agency staff can produce documentation of registration as an OBB site and documentation that clients routinely use this service.				family diversion, Outreach

Discussion and Basis for Conclusion

The program type changed on this standard to add Outreach.

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Standard G5	Guideline G5	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
The agency maintains a timely and responsive line of communication upon initial contact with clients.	☐ Program staff can describe the following: how calls are answered in person, rather than by voice mail; the process for identifying and responding to priority requests in the same day they are received; the process for ensuring telephone backlogs do not exceed 2 days; how waiting times for appointments is 2 days or less.	Voluntary self-certification	☐ Compliant ☐ Compliant with conditions ☐ Non-compliant ☐ N/A		Vol	All programs

Discussion and Basis for Conclusion
Agency signed in separate packet.

Standard G6	Guideline G6	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
The agency encourages client accountability for progress on IHSPs. Clients who do not work toward self-sufficiency are asked to exit emergency shelters.	☐ Agency staff maintains constant communication and documentation regarding a client's progress toward his/her IHSP. If the client has not made any progress within 20 days of IHSP receipt, the client will receive an additional 10 days to make progress. If after the additional 10 days the client still did not make any documented progress, the client will be asked to leave the	☐ CSB reviewed client files. ☐ CSB discussed in conjunction with Standard G2.	☐ Compliant ☐ Compliant with conditions ☐ Non-compliant ☐ N/A		1	Navigator, Shelters

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	emergency shelter. ☐ The program can provide documentation demonstrating adherence to these deadlines and documentation outlining client progress completing IHSPs.			

Discussion and Basis for Conclusion

The program type changed on this standard to add the Navigator program.

Standard G7	Guideline G7	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Programs identify and assess each client's barrier to housing within 5 business days from entry into the emergency shelter, Rapid Rehousing/Navigator programs, or transitional housing programs, including the completion of the CSB Vulnerability Assessment form. Agency staff routinely assess and update client barriers and disabilities (if	☐ Agency staff can describe the process used to engage clients upon entry into the emergency shelter, Rapid Rehousing/Navigator programs, or transitional housing programs, including completion of the Vulnerability Assessment form no later than 5 business days from entry. ☐ A copy of the Vulnerability Assessment is available for review in each client file.	☐ Agency staff explained agency methods to engage clients in a timely manner. ☐ CSB reviewed client files.	☐ Compliant ☐ Compliant with conditions ☐ Non-compliant ☐ N/A		1	PSH, TH, Navigator, RRH/ Navigator, Family Shelters, Outreach, Front Door

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applicable) 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.	☐ A copy of the Vulnerability Assessment form is forwarded to Rapid Rehousing / Navigator and transitional housing providers. ☐ 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 six months. It is recommended, but not required, that agency staff update the Vulnerability with each shelter, Rapid Rehousing/Navigator, or transitional housing stay. ☐ Outreach programs complete a Vulnerability Assessment. ☐ Housing programs demonstrate an up-to-date Vulnerability Assessment in the client files as part of the client eligibility documentation. ☐ The Vulnerability Assessment must be completed not more than 6 months prior to entry into				

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housing.					
Discussion and Basis for Conclusion					

* CSB staff initials for Tier 1 and Tier 2

*Agency staff signature for Tier 3 and Voluntary

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CSB certifying official signature   Date

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CSB certifying official legibly printed name

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