



2018 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, staff training, policies, and services provided. There is no punitive consequence to low self-evaluation in any of these areas. The information will be used by the agency and All Chicago 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 include referrals to workshop or training opportunities, sample tools or templates, feedback to help strengthen the agency's tools, templates, or policies, HMIS guidance, and referrals to articles and outside experts.

Your Name: _____

Your Title: _____

Your Email: _____

Your Phone Number: _____

Agency & Project Name: _____

Intake/Termination Procedures

1. Our agency utilizes Coordinated Entry System (CES) to fill all unit openings: (select one)

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

2. Please write a narrative to explain any barriers that prevent you from utilizing the CES for openings 100% of the time.

3. Please write a narrative to explain any barriers to rapidly housing CES referrals.

4. Tools our agency uses in the CES matching process include: (select all that apply)

- Reaching out to current providers the client is enrolled with
- Reaching out to the skilled assessor when we can't locate a client
- Reaching out to client's alternate contact
- Reaching out to the client via means other than phone and email
- Reaching out to the outreach team when we can't locate a client



- Regularly updating a client's need status in HMIS
- Assisting a client with obtaining documentation to ensure access to housing
- Uploading client documentation into HMIS
- Having a skilled assessor on staff
- Having a housing locator on staff
- Having case managers who are able to assist with obtaining documents
- Having case managers who are able to assist with housing location
- Other - Write In: _____

5. Our project ensures all new clients meet the definition of chronic homelessness: (select one)

Please answer this question according to the project that is being monitored. If your agency is being monitored for more than one project, answer this question according to your PSH project.

- 100% of the time
- 90% - 99% of the time
- 80% - 89% of the time
- Less than 80% of the time
- Not Applicable - Please Explain: _____

6. Please write a narrative to explain any barriers to verifying chronic homelessness.

7. Tools we use in the process to verify chronic homelessness include: (select all that apply)

- Chicago's Chronic Homelessness Verification Packet
- HUD's Chronic Homelessness Flow Chart
- All Chicago's Housing History Tool
- Trainings on the chronic homeless definition
- Other - Write In: _____

8. Are tenants provided information on Fair Housing laws upon intake?

- Yes
- No

9. Please write a narrative to explain any steps the client must take prior to completing an intake with your program(s).



10. Please write a narrative to explain any barriers that could impact a client's ability to enroll with your program(s).

11. Tools we use to help clients avoid eviction include: (select all that apply)

- Transfers to another program/agency when necessary to avoid eviction
- 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
- Other - Write In: _____

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

13. Please add any additional narrative to explain the current challenges faced by the organization or areas where the agency believes they can improve related to this section (questions 1-12). This space can also be used to outline any steps the agency is already taking to develop solutions. Please consider highlighting system level barriers, agency level barriers, or project level barriers.

Data Collection/Quality and Performance Improvement

14. Does your agency participate in the Homeless Management Information System (HMIS)?

- Yes
- No

15. Does your agency have an internal data quality plan that is reviewed and updated regularly?

- Yes
- No

16. What personnel primarily enters your clients' universal data elements in HMIS? (select all that apply)

- Agency Technical Administrator (ATA)
- Program Managers
- Supervisors



- Case Managers / Frontline staff
- Interns or Temporary Staff
- Other - Write In: _____

17. Once a client is entered into HMIS and the universal data elements are completed, who primarily maintains the client record in HMIS (i.e., such as entering client level updates)? (select all that apply)

- Agency Technical Administrator (ATA)
- Program Managers
- Supervisors
- Case Managers / Frontline staff
- Interns or Temporary Staff
- Other - Write In: _____

18. How many databases does your organization input client data into?

19. How often does your agency utilize the HMIS Help Desk: (select one)

- Daily
- Weekly
- Monthly
- Other - Write In: _____

20. How often does your agency review your data and evaluate outcomes: (select one)

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

21. Please write a narrative to explain the types of data your agency reviews.

Examples may include, but are not limited to the following data points: move-ins, exit destinations, income outcomes, etc.



22. Please write a narrative to explain how your agency utilizes HMIS data in program planning.

23. What staff are included in your data quality review processes? (select all that apply)

- Senior Leadership
- Directors
- Program Managers
- Case Managers
- Frontline Staff
- Other - Write In: _____

24. Please add any additional narrative to explain the current challenges faced by the organization or areas where the agency believes they can improve related to this section (questions 14-23). This space can also be used to outline any steps the agency is already taking to develop solutions. Please consider highlighting system level barriers, agency level barriers, or project level barriers.

Staff Development and Training

25. Does your agency provide regular internal training opportunities for your staff?

- Yes
- No

If yes, which topics has your agency provided trainings on within the last year?

If no, why was your agency unable to provide trainings?

26. Has your agency sent staff to external training opportunities in the last year:

- Yes
- No

If yes, which topics has your staff received trainings on externally within the last year?

If no, please explain why not?

27. Those that have access to trainings include: (select all that apply)

- Board of Directors
- Senior Leadership
- Program Managers
- Case Managers



- Frontline Staff
- Volunteers
- Participants
- Outside Stakeholders
- Other - Write In: _____

28. Please add any additional narrative to explain the current challenges faced by the organization or areas where the agency believes they can improve related to this section (questions 25-27). This space can also be used to outline any steps the agency is already taking to develop solutions. Please consider highlighting system level barriers, agency level barriers, or project level barriers.

Policies and Procedures

29. Our agency has written policies regarding the following: (select all that apply)

- Compliance with HUD's Equal Access Rule
- Housing First
- Program transfers
- Tenant-driven voluntary services
- Reasonable accommodation requests for tenants with disabilities
- Ensuring that families with children under 18 are not separated or denied admission into housing

30. Please add any additional narrative to explain the current challenges faced by the organization or areas where the agency believes they can improve related to this section (question 29). This space can also be used to outline any steps the agency is already taking to develop solutions. Please consider highlighting system level barriers, agency level barriers, or project level barriers.

Service Provision

31. What is the typical caseload ratio?

32. Supportive services at our agency: (select 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 tenants
- 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 months
- Review and update goal plans quarterly
- Review and update goal plans monthly

33. Service staff provide on-site or refer to the following: (select all that apply)

Workforce development agencies

- On-site
- Refer
- Not provided on-site or through referral
- N/A

SOAR trained staff to connect individuals with benefits

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Legal services

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Medical Services

- On-site
- Refer
- Not provided on-site or through referral
- N/A



Assessing service needs

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Moving assistance

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Case management

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Child care

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Education services

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Food

- On-site
- Refer
- Not provided on-site or through referral
- N/A



Housing search and counseling

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Life skills

- On-site
- Referral
- Not provided on-site or through referral
- N/A

Mental health

- On-site
- Refer
- Not provide on-site or through referral
- N/A

Outreach services

- On-site
- Refer
- Not provided on-site or through referral
- N/a

Substance abuse treatment

- On-site
- Refer
- Not provided on-site or through referral
- N/A

Transportation

- On-site
- Refer
- Not provided on-site or through referral
- N/A



Utility deposit assistance

On-site

Refer

Not provided on-site or through referral

N/A

Add any other categories that would be helpful: _____

34. Please add any additional narrative to explain the current challenges faced by the organization or areas where the agency believes they can improve related to this section (questions 31-33). This space can also be used to outline any steps the agency is already taking to develop solutions. Please consider highlighting system level barriers, agency level barriers, or project level barriers.

General Summary Questions

35. Based on your local evaluation scorecard, please develop a plan to improve your score for the following year. Write a narrative outlining the areas in which you did not receive full points and describe the plan, if applicable, to make improvements.

36. Based on completing this self-assessment, please identify areas of technical assistance you believe your agency could benefit from. Write a narrative to outline areas of TA you are interested in.