

## 2021 Program Review and Certification Standards

### G. Services Planning

**New requirements are in red text and do not apply for the 2021 PR&C review. These requirements will be applicable in 2022.**

**Minor adjustments and clarifications and changes to Tiers are in green text. These changes are applicable for the 2021 PR&C review.**

**Bold are requirements that now apply for the 2021 PR&C review.**

Standard G1	Guideline G1	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Staff develops individualized housing stabilization plans (IHSPs) with clients within 5 business days of program entry. IHSPs are signed by staff and the client and include: (1) Specific goals and actions to address housing barriers and other critical service needs; (2) Client, staff, or community agency responsibility for each step; (3) Timeframes for each step; (4) Services and supports to be provided and by whom;	<input type="checkbox"/> IHSPs clearly document client housing goals and the actions necessary to address housing barriers and other service needs.  <input type="checkbox"/> Staff can describe the process for developing IHSPs and how clients are actively engaged in creating an achievable, time-bound IHSP at program entry.  <input type="checkbox"/> 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, including with clients who have experienced multiple shelter stays, long-term homelessness, and/or disabilities.  <input type="checkbox"/> Staff assess clients on an ongoing basis and IHSPs are updated at least annually, but preferably	<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	All programs except Maryhaven Safety, CPoA, Diversion, Single Adult Overflow, CARR Team, and Prevention for households that just need financial assistance and no services.

Agency:

Date of Review:

**2021 Program Review and Certification Standards**  
**G. Services Planning**

<p>(5) Desired housing and service need outcome(s).</p>	<p>quarterly, to adjust housing and service goals and actions.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> For YHDP programs, at youths' discretion, IHSPs should include an employment and education goal.</li> <li><input type="checkbox"/> Staff and clients sign IHSPs. A copy of the signed IHSP is available for review for each client .</li> <li><input type="checkbox"/> Family shelter staff update IHSPs with conditions if a household is re-entering within 90 days.</li> </ul>					
<p><b>Discussion and Basis for Conclusion</b></p>						

Standard G2	Guideline G2	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
<p>Client files include up-to-date case notes that record client and service provider contacts and client progress toward obtaining and, where applicable, maintaining permanent housing.</p> <p>RRH and Prevention programs assess clients monthly for</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Case notes are concise, factual, relevant, and legible. Case notes include details of client progress including housing stabilization once clients move into housing.</li> <li><input type="checkbox"/> All shelter and TH advocates provide a weekly note in each client file stating progress towards housing goals.</li> <li><input type="checkbox"/> CARR Team should document engagement as youth are contacted or monthly at minimum.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>File Review</u>: CSB reviewed client files.</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>		<p align="center">1</p>	<p>All programs except CPOA / Homeless Hotline</p>

Agency:  
Date of Review:

**2021 Program Review and Certification Standards**  
**G. Services Planning**

<p>financial assistance needs and at least quarterly to increase or decrease the amount, type and duration of assistance, including to determine whether housing stability has been achieved and case closure is indicated.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Street Outreach should attempt to locate and confirm open clients are still unsheltered via direct contact with client at minimum once per month (i.e., an outreach 'contact'). Multiple monthly contacts may be documented on a single contact record in CSP or case notes in the client case file.</li> <li><input type="checkbox"/> Shelter staff provides 1-2 sentences in a case note or activity log on staff interactions with clients and progress towards housing goals in individual client files for every 7 calendar days a client is in shelter. One can be the Housing Assistance Screening Tool or a note on assisting the client in coordinating a meeting with their RRH case manager.</li> <li><input type="checkbox"/> Diversion, Prevention, and RRH case notes should show progress toward obtaining and, where applicable, maintaining permanent housing. Client files should demonstrate bi-weekly engagement for Prevention and monthly engagement for RRH at a minimum.</li> </ul>					
---	---	--	--	--	--	--

Agency:  
Date of Review:

**2021 Program Review and Certification Standards  
G. Services Planning**

	<ul style="list-style-type: none"> <li><input type="checkbox"/> For RRH and Prevention, the program uses the Homelessness Prevention and Rapid Re-Housing Case Review and Closure Checklist tool <b>or other case note documentation at least quarterly</b> to guide service amount, type and duration, including exit determinations.</li> <li><input type="checkbox"/> PSH documents engagement attempts quarterly at a minimum, with a goal of monthly engagement attempts. The regularity and intensity is dependent on client needs, barriers, and preferences to ensure clients retain housing and receive services.</li> </ul>					
<b>Discussion and Basis for Conclusion</b>						

Standard G3	Guideline G3	Monitoring Method	Conclusion	Certifying Official*	Tier	Program Type
Agencies screen and make referral to appropriate supportive service and mainstream benefits providers relevant to addressing client housing barriers	<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 Child Care, Head Start, food stamps, Medicaid, Medicare, SSI, SSDI, etc.).</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Discussion:</u> Staff explained the process for service referrals and what systems they use.</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> </ul>		1	All programs

Agency:  
Date of Review:

**2021 Program Review and Certification Standards  
G. Services Planning**

<p>and/or critical service needs. Staff helps clients determine eligibility and complete benefit applications.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Other services may 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.</li>   <li><input type="checkbox"/> The agency makes referrals to places that provide targeted services to represented sub-populations including, but not limited to: Youth (under 25), LGBTQ+, New Americans, Pregnant Women, Persons of Color, Survivors of Human Trafficking, Former Foster Youth (under age 22), Veterans, and Restored Citizens.</li>   <li><input type="checkbox"/> Agency staff is trained to use or access SOAR resources and can describe how staff links clients to services, if applicable. YHDP programs must have SOAR-</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <u>File Review:</u> Documentation that YHDP programs have SOAR-certified staff.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> N/A</li> </ul>			
--	--	--	--	--	--	--

Agency:  
Date of Review:

**2021 Program Review and Certification Standards**  
**G. Services Planning**

	trained staff, per HUD requirements.					
<b>Discussion and Basis for Conclusion</b>						

<b>Standard G4</b>	<b>Guideline G4</b>	<b>Monitoring Method</b>	<b>Conclusion</b>	<b>Certifying Official*</b>	<b>Tier</b>	<b>Program Type</b>
Programs use applicable screening and prioritization tools at client entry in compliance with Homeless Crisis Response System (HCRS)* Policies and Procedures (P&Ps).	<input type="checkbox"/> Staff can describe the process for engaging clients upon entry, including completion of the applicable screening and prioritization form no later than 5 business days from entry.  <input type="checkbox"/> Shelters (except Maryhaven Safety program) and CARR Team staff complete the Housing Assistance Screening Tool (HAST) for each client within 5 business days of program entry, submit it to the entity according to HCRS P&Ps, and upload it to the head of household's record in CSP or securely sends it to the RRH program to which the client is referred and accepted, to document prioritization. If the client has a break in shelter stays greater than 7 days, complete a new HAST.	<input type="checkbox"/> <u>File Review</u> : CSB reviewed client files.  <input type="checkbox"/> <u>Discussion</u> : Staff explained methods used to engage clients in a timely manner.  <input type="checkbox"/> <u>File Review</u> : PSH is monitored through USHS. CSB will review any selected PSH client files that pre-date agency participation in USHS.	<input type="checkbox"/> Compliant  <input type="checkbox"/> Compliant with conditions  <input type="checkbox"/> Non-compliant  <input type="checkbox"/> N/A		1	Shelters (except Overflow), CARR team, Outreach, RRH, PSH /USHS, TH

Agency:  
Date of Review:

**2021 Program Review and Certification Standards**  
**G. Services Planning**

	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Maryhaven Safety program completes the HAST when possible for clients requesting services.</b></li> <li><input type="checkbox"/> Outreach staff completes the Verification of Street Homelessness form.</li> <li><input type="checkbox"/> For RRH and TH/RRH, the client file <b>must have</b> confirmation that the client was referred to the RRH or TH/RRH program (e.g., email or other documentation from the entity managing the prioritization pool).</li> <li><input type="checkbox"/> For PSH, a copy of the Severe Service Needs Assessment is available in each client file as part of the housing prioritization process managed through USHS.</li> </ul>					
<p><b>Discussion and Basis for Conclusion</b></p>						

\*Homeless Crisis Response System (HCRS) Policies & Procedures - <https://www.csb.org/providers/csb-hearth>

CSB reviews Tier 1 standards annually and 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.

Agency:  
Date of Review: