

Greater Moncton
Homelessness
Steering Committee



Comité Directeur
Des Sans-abri
Du Grand Moncton

Coordinated Entry System Guide Housing Assessment Review Team (HART)



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1. Acknowledgements

This guide was developed by the Greater Moncton Homelessness Steering Committee in collaboration with the Housing Assessment Review Team (HART) and housing and homelessness stakeholders, based on the experience and support from a number of leaders in coordinated access systems across North America including the Saint John Human Development Council, Canadian Alliance to End Homelessness, Built for Zero Collaborative, OrgCode Consulting Inc., and Guelph-Wellington Coordinated Access System Guide. We wish to thank each and every group for their support in developing this guide.

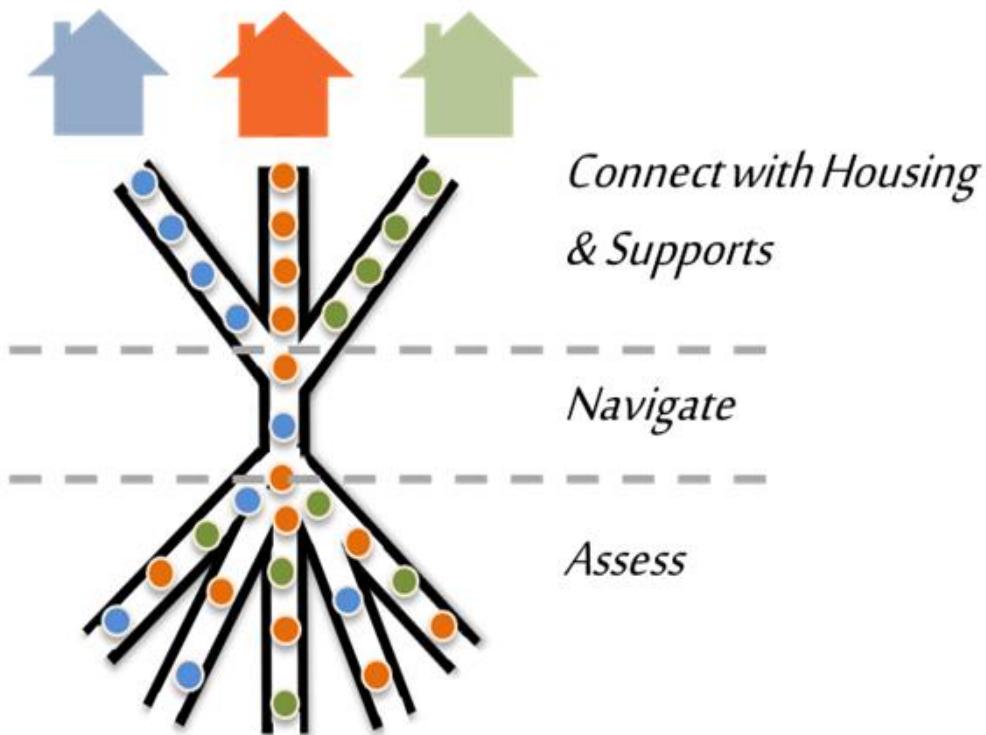
If you have any questions regarding this guide, please contact the Greater Moncton Homelessness Steering Committee at (506) 854-3499 extension 203.

2. Introduction

Coordinated Entry is a standardized approach to assessing individuals or families experiencing homelessness needs and the services they may require to achieve housing stability. Having an effective Coordinated Entry System (CES) streamlines access to housing and supports for individuals and families experiencing homelessness.

The Housing Assessment Review Team (HART) was established in 2016 to implement Coordinated Entry and improve service delivery to individuals and families experiencing homelessness in the Greater Moncton region. Service providers that make up the HART Table work together to assess people's housing-related needs, prioritize them for resources, and link those in need to housing and a range of other supports.

This guide has been developed to help Service Providers, individuals and community understand and deliver the standardized CES process, including sharing information, intake and assessment process, prioritization and by-name-list administration.



3. What is Coordinated Entry System?

Coordinated Entry is a shared and standardized method for connecting individuals or families experiencing homelessness or at risk of homelessness to the resources available within the City of Moncton.

Families and individuals are assessed using OrgCode's Vulnerability Index-Service Prioritization Decision Assistance Tool (VI-SPDAT)¹ at an HART member agency. The VI-SPDAT is a pre-screening, or triage tool that is designed to be used by all Service Providers within a community to quickly assess the health and social needs of the person experiencing homelessness. VI-SPDAT's are completed immediately with families and individuals if there has been a previous experience of homelessness. If this is the first experience of homelessness, the VI-SPDAT will be completed after 7-14 days, if they have been unsuccessful in obtaining housing on their own and within their identified resources. In this way, we can help assist individuals to become independent of the system, and allow them to problem solve on their own. Using this tactic, which we refer to as diversion, helps prevent future incidents of homelessness.

Our Coordinated Entry System is our Housing Assessment Review Team (HART), which includes: Salvus Clinic, Harvest House, Ensemble, YMCA ReConnect, SUN Moncton, Salvation Army Family Services, Crossroads for Women, House of Nazareth, YWCA, NB Housing, FACT – Horizon and Vitalite, Youth Impact/Youth Quest Central, and the Saint John Human Development Council.

Once assessed, families and individuals are added to HIFIS 4², as well as the HART By- Name list (BNL), then sorted by community prioritization factors into HART Housing Prioritization List (HPL). A By-Name List is a real-time, up-to-date list of all people experiencing homelessness in our community. BNL's allow communities to know every person experiencing homelessness by name to facilitate decisions around how best to prioritize those for housing based on the individual's needs and types of housing available.

The By-Name List will inform referrals to appropriate housing services and supports. Families and individuals that are prioritized through the Coordinated Entry System will be referred to the appropriate

¹ <https://www.orgcode.com>

² Homeless individual and families information services: A comprehensive data collection and case management system designed to better understand what is happening in your community and how to work collaboratively – <https://www.canada.ca/en/employment-social-development/programs/homelessness/hifis.html>

services and supports through HART, which again is made up of key partners in the Coordinated Entry System.

4. Guiding Principles of HART's Coordinated Entry System

HART Coordinated Entry System (CES) is guided by the principles and goals outlined in “Reaching Home: Canada’s Homeless Strategy”, a ten year housing and homelessness plan, the Built for Zero Campaign, and the philosophy of Housing First.

The benefits of the CES for our community are:

- Creation of a real-time, up-to-date BNL of all people experiencing homelessness in our community and the ability to track each person’s progress towards housing placement
- Enhanced coordination among homeless system providers
- Adoption of a Common Assessment Tool to assess clients vulnerability and needs
- Ability to prioritize services based on who needs it the most and matching them to resources that fit their needs
- Ability to better understand the inflow and outflow of clients within the homelessness system
- Provides data required to assist with future system planning and advocacy
- Reduces the number of people experiencing homelessness or at risk of experiencing homelessness

Housing First is a recovery-oriented approach to ending homelessness that centers on quickly moving people experiencing homelessness into independent and permanent housing and then providing additional supports and services as needed.³

The 5 core principles are as follows: ⁴

1. Immediate access to permanent housing with no housing readiness requirements
2. Consumer choice and self-determination
3. Recovery oriented
4. Individualized and client-driven supports
5. Social and community integration

³ Based on the Canadian Observatory on Homelessness 2017

⁴ Based on Housing First in Canada: Supporting Communities to End Homelessness 201

While these are best practices we seek to carry out in our community and through our operations, we acknowledge that our resources in housing choices are limited, and we are not always able to provide housing based on consumer choice and self-determination. It is our hope that through advocacy and community development, this will become reality.

5. Background

The Greater Moncton Homelessness Steering Committee (GMHSC) made common intake and assessment (CIA) a priority of the Greater Moncton's 5 year Community Plan to end homelessness in 2014-2019. Over the winter of 2016, a consultant was engaged to conduct a literature review and community consultation to determine a recommended model of CIA for Greater Moncton. The community believed that the landscape and services locations of this community necessitated a decentralized model where any door is the right door for an individual to access supports in finding housing and a placement committee would discuss each assessment as a group to determine which program best fits the needs of an individual. The Committee adopted using the VI-SPDAT as well as the SPDAT from OrgCode as entry into CES.

In 2016, the GMHSC became a member of the 20,000 Homes Campaign, a movement to house 20,000 individuals before the year 2020. In March 2019, after reaching the national goal of housing 20,000 individuals, the 20,000 Homes Campaign announced its re-launch as Built for Zero Canada (BFZ-C). Moncton is currently working on finalizing our prioritizations for our By Name List (BNL), and will be ready to submit quality real time data once that is complete. BFZ-C uses a structured, supportive and data-driven approach that focuses on optimizing local homeless systems, accelerating the adoption of proven practices and driving continuous improvement.

6. Adding to the BNL

In order to participate in the CES, staff at HART agencies must complete a Code of Confidentiality (Appendix A). Agencies that are using the Homeless Individuals and Families Information Sharing System (HIFIS) will be required to sign the HART HIFIS Data Sharing Protocol Agreement (Appendix B).

Consent and Confidentiality agreements allow Service Providers that make up HART to work together to find appropriate supports and housing placements for households and individuals.

7. BNL Eligibility

Each HART Agency has access to the By-Name- list in read only format. If the family or individual is already on the BNL, the Common Assessment Tool will only be updated if there has been a major life event or a change in their status that could change the previous survey results.

Staff will determine if the family or individual is experiencing homelessness in one of the following ways:

- Unsheltered : Living on the streets or in places not intended for human habitation
- Emergency Sheltered: Staying in overnight shelters for people who are experiencing homelessness, as well as shelters for those impacted by family violence
- Risk of homelessness: Referring to people who are not experiencing homelessness, but whose current economic and/or housing situation is precarious or does not meet public health and safety standards

8. Administering the Common Assessment Tool (CAT)

A Common Assessment Tool (CAT) uses a standardized scoring system to assist communities in determining the appropriate level of intervention for the individual or family experiencing homelessness. These interventions, in all cases, should result in permanent housing placement and facilitate referrals to the existing inventory of housing availability. The CAT being used for HART to add individuals and families to the BNL is the VI-SPDAT. There are three versions being used for different populations:

- VI-SPDAT : Includes individual adults over 25
- TAY-VI-SPDAT: Includes unattached youth 24 years or younger
- F-VI-SPDAT: Includes family units (households with dependents under 18)

Trained agency staff will choose the appropriate VI-SPDAT to be completed. Prior to completing the assessment, staff will review the HART Consent to Release Information form, and a pre-screening tool to gather essential information for prioritization and allow individuals to be added to the BNL even if the CAT cannot be completed at that time. The agency staff then can continue to engage the individual at a later date to complete the CAT.

9. Updating the BNL

The BNL is currently managed by the GMHSC Community Development Coordinator (CDC), also referred to as the Data Lead, in a secure Excel database. HART member agencies have access to a read-only BNL in a secure location and can provide individual status updates to the CDC. The BNL is updated bi-weekly, to ensure real-time data and to avoid delays in prioritizing individuals for service. All BNL information viewed or accessed in all forms – written, electronic, or printed, is to be treated as confidential. Work is underway to use HIFIS 4 to manage the BNL in real-time.

10. Inflow and Outflow

The BNL tracks the status change for each individual. Inflow represents the number of individuals that are currently homeless in our community. Inflow consists of individuals that have been newly identified as homeless, returned from a housing placement, or returned from inactive status. Outflow reflects the number of individuals that have found a permanent housing placement or become inactive (moved, no contact, incarcerated).

11. Inactivity Status

Removing inactive clients from the active prioritization list is important to ensuring the HART list remains a real-time priority list, and that the matching and housing support agreement processes can be completed as quickly as possible.

A conscious effort is made to identify and reach out to all individuals and families approaching the 90 day inactivity threshold, by completing 3 outreach attempts. If an individual has had no contact with HART member agencies after 90 days, and they have had no shelter stays in HIFIS 4 for the past 3 months, the individual or family will have their status changed to inactive. If an individual or family who has been moved into inactive status makes contact with a HART member agency, they will be added back on the active HART BNL as “Returned-Engaged”. An updated VI-SPDAT assessment may be required depending on the length of time and changes in their circumstances.

The Data Lead will review the HART list monthly to identify individuals approaching 90 days of inactivity and reach out to HART members for updates before changing the status to inactive.

12. Prioritization

Once an individual has been added to the BNL, they are prioritized for housing supports through the HART Prioritization List (HPL) when programme spaces become available. Programme matches are determined by the eligibility criteria for an agency, as well as community determined factors for prioritizing individuals and families. (Appendix C)

Prioritization is determined based on the following criteria and matched within a programme eligibility requirements:

1. VI-SPDAT score
2. Chronic Homelessness
3. Indigenous
4. Community decided factors (Appendix C)

While an individual is waiting to be matched, they can continue to access supports and resources in the community.

13. HART Housing Providers & Prioritization of Units

All housing provider agencies who are members of HART are required to prioritize individuals and families listed on the BNL for housing when appropriate units are available. HART recognizes that agencies who own housing have funding requirements they must also meet. In order to ensure “side doors” remain closed, and CES prioritization remains the key factor in selecting individuals and families for housing, HART Housing Agencies will allocate 90% of all available units to HART for prioritization, unless otherwise limited by core funding requirements. The following is a breakdown of Housing Agencies and their requirements.

YWCA Moncton

Onsite Housing requirements

- Single female* aged 16 - 60 (including pregnant or 1 child under the age of 5)
- New Brunswick Housing eligibility (low-income and no previous housing arrears)
- Low-acuity, minimal housing support needed
- No substance use
- Agrees to rental payment plan

Scattered site housing requirements

- 18 + single female* or single parent
- New Brunswick Housing eligibility (low-income and no previous housing arrears)

- Mid to High Acuity
- Agrees to Intensive Case Management
- Agrees to rental payment plan

Department of Justice housing requirements

- Active in sex trade and/or in the process of leaving the sex trade (sex trade is defined as escort services, prostitution, exotic dancing, etc)
- 18 + single female*
- Agrees to Intensive Case Management
- Agrees to rental payment plan

*Women is inclusive to anyone who identifies as female

Salvus Clinic

Peer Supportive Housing requirements

- Male or female* 18 + single individuals (with some exceptions made for couples)
- High Acuity (Housing First)
- Severe or persistent mental illness
- Possible addiction issues
- Must have experienced homelessness

Scattered Site housing requirements

- Male or female* 18 + single individuals (with some exceptions made for couples)
- Possible addiction issues
- Currently experiencing homeless or at risk of homelessness
- New Brunswick Housing eligibility (low-income, no previous housing arrears)
- Agrees to Intensive Case Management

*Male and female is inclusive to anyone who identifies as either male or female

John Howard Society

On-Site housing requirements

- Male-only*, age 18 – 55
- Low to mid-acuity
- Agrees to Housing Case Management

*Male is inclusive to all who identify as male

Crossroads for Women

Blossom House housing requirements

- Single Female only
- Fleeing Domestic Violence
- Mental Health Issues
- History of addictions

New Brunswick Housing

HART has a partnership with the Regional Housing Office of Social Development, also known as New Brunswick Housing, to receive five subsidies or subsidized units per month (depending on availability of units) for housing prioritization from the BNL. Once received, these units remain HART units, allowing HART to recycle the subsidies for other tenants if the unit becomes available.

14. Housing Assessment Review Team (HART)

HART is a community group of service providers that meet bi-weekly to improve the continuity of care for people experiencing homelessness with the highest complexity of needs, by coordinating access to available housing units and providing housing supports when the individual is housed. The HART meetings will foster collaboration and communication among community partners to support the individuals on the BNL.

Staff participating in HART are referred to HART by Agency they are employed with, and will be subject to adhering to their employed agency policies and procedures. They must complete an Oath of Confidentiality (Appendix A) and agree to the HART Terms of Reference (Appendix D). The main roles and responsibilities of HART are as follows:

1. Ensure the BNL is up to date
2. Address placement of people into programs with available space based on triaging those with the highest need and best match
3. Problem solve how to reduce barriers for supports and services
4. Identify gaps and barriers, provide feedback and recommendations for policy changes to HART and to the greater community

In the event of a breach of confidentiality or a conflict of interest by an Agency employee, members of HART will vote for the individual's membership removal, and the Agency the individual represents will be responsible for any additional disciplinary action.

For further information on HART, please refer to our Terms of Reference (Appendix D)

15. Role of Outreach

In order to ensure all individuals experiencing homelessness in our community are properly documented and assessed, we rely on outreach services to connect with unsheltered individuals. The role of Outreach is as follows:

- Directly engage with people where they are situated
- Create a “live map” of the City and ensure all zones are covered, with “hot spots” visited regularly
- Ensure individuals are referred and added to the BNL, and document any housing requirements needed
- Sit as an active member of HART and provide regular updates to HART on individual’s status
- Regularly update individual’s with important information and accompany to relevant appointments when necessary
- Refer individual’s to appropriate services and perform introductions to other service providers when possible

Outreach roles and responsibilities will vary within different organizations, but outreach working within coordinated access will be expected to operate with a Housing First orientation, ensuring the main focus is not offering hand outs, but moving individuals toward housing solutions. While outreach teams will work in partnership with municipalities and policing services, outreach teams aligned with coordinated access will not be responsible to enforce municipal By-Laws. The role of outreach teams will always remain focused on the needs of the individuals being served, as well as documenting and collecting data.

16. Dispute Resolution

If a systemic or case specific dispute arises, the following procedures will be used to resolve them.

Examples of case specific disputes are:

- Accuracy of assessment score
- Prioritization on the BNL
- Program Placement

Disputes of this nature will be addressed using the following steps:

1. Members of HART will discuss the issue during their meeting and seek resolution.
2. If a resolution is not achieved during step 1, the Chair will bring the issue forward to the Community Development Coordinator. The Community Development Coordinator will involve other managers and the GMHSC Leadership Council as necessary depending on the issue to seek resolution
3. If steps 1 and 2 are ineffective, it will be brought forward to the Saint John Human Development Council and/or Built for Zero Improvement Advisor to recommend a solution.

Examples of systemic disputes are:

- Administrative or procedural differences
- Differences in service philosophy, principles or politics

Disputes of this nature will be addressed using the following steps:

1. Staff will identify the nature of the dispute and discuss with their manager
2. Managers identified as part of the dispute will discuss the issue to seek a resolution
3. If a resolution is not achieved during steps 1 and 2, the Community Development Coordinator will bring the issue forward to the Saint John Human Development Council and/or Built for Zero Operations Committee to recommend a strategy to resolve the issue.

Appendix A

**Housing Assessment Review Team (HART)
Confidentiality Statement**

I, _____, of _____
(name of organization)

am aware that as a service provider member/guest of The Housing Assessment Review Team (HART) I will have access to confidential information for the purposes of assessing appropriateness of applicants for housing services. I agree to protect the privacy of applicants/clients and abide by the privacy policies of my organization with respect to access, storage and sharing of client information.

In particular, I will:

- Treat all client data as confidential, and only engage in discussion of such information as required in the course of my professional duties
- Not release, or otherwise provide access to such information to another person, agency or body without the required prior authorization by the client and/or the HART
- Ensure that confidential information is kept in a secured location at all times
- Equally ensure that any personnel information I am entrusted with remains confidential and secure
- Ensure all information related to data entered into HIFIS 4, whether client based or organization based, will remain confidential

I acknowledge a responsibility to report any instances of breaches of privacy or confidentiality, or if information appears to be misused to cover actions that might be fraudulent, unethical or criminal in their intent. I accept that HART will treat such reports in confidence and will protect me from negative sanctions if such reporting was taken without malicious intent on my part. I also understand that improper disclosure of client information may be cause for the HART to recommend my removal from the placement committee.

Signed: _____

Date: _____

Witness: _____

Date: _____

Appendix B

Housing Assessment Review Team

Consent to Release Information and Service Agreement

The Housing Assessment Review Team (HART) is a team of agencies working together to match people with housing that best meets their needs. This form explains how the HART works and how your information will be shared with others, if you agree to the service.

This form will be reviewed carefully with you. You can ask questions if you do not understand any part of it.

Client Name (Print)

Date of Birth:

Best way to contact:

I UNDERSTAND THAT:

- If I choose to share information with the HART it will be voluntary. If I do not agree to share information with the HART, it will limit my access to some housing options. Not agreeing to share means that the HART cannot work *together* for me however individual agencies can offer services to assist me in my housing search should such a program be available.
- I may agree to the sharing of personal information on behalf of minor children or other people that are in my care legally.
- I have a right to see a current list of Agencies on the HART. I understand that other agencies may join the HART at any time, and that these agencies will sign confidentiality agreements prior to having any information shared with them.
- I have a right to see a copy of my personal information that HART members have collected about me.
- This agreement does not have an end date. My consent will remain active unless I no longer agree to have my information shared with HART and complete the Termination of Consent Form. Then no new information about me will be able to be collected or shared.
- I hereby allow HART to use and share with each other personal information from my client file. I have been told about the pros and cons of allowing my personal information to be shared.
- I understand I am required to follow up with any HART agency for updates and to keep my status as "Active". Failure to keep in contact means after 90 days, my information will be moved into an "Inactive" status.

HART may also contact these people or agencies who are also important supports in my life:

PLEASE NOTE: By signing this consent form you are agreeing to have HART service providers communicate and share the relevant information pertaining to health, finances and housing history about you.

Use and Disclosure of Personal Information:

I UNDERSTAND THAT:

- Personal information that is collected will only be used to help find the best match in housing for you.
- The HART does keep statistics about the services it provides. This information is kept to help develop policies, report to funders, and identify service gaps and needs in the community. Information used in this way will not identify you or information about your personal situation.
- HART members use a shared electronic database called HIFIS (Homeless Individuals and Families Information System) to enter and save information about you.
- HART may disclose your personal information without your consent when it is permitted or required by law to do so. For example, HART may use and disclose personal information in the following circumstances:
 - You are in serious danger of harming yourself
 - You know about another person who is in danger of being harmed
 - You will harm another person
 - A child (age 0-18) is being abused, neglected or is a witness of abuse
 - A dependent adult is being harmed or abused
 - If your file is subpoenaed.

Dated and effective as of _____ (Day/Month/Year)

Signature of Client

Print Client’s Full Name

I believe that the person signing this form understands what is involved in the HART program and voluntarily agrees to participate.

Signature of Witness

Print Witness’s Full Name

Appendix C

Priority List for Individuals Experiencing Homelessness in Moncton

Clients will be organized and served in this order:	CHRONIC *FUNDING PRIORITY*	INDIGENOUS *FUNDING PRIORITY*	SLEEPING ROUGH OR UNSAFE COUCH SURFING	MENTAL, PHYSICAL OR SUBSTANCE USE DISORDER (TRI-MORBID)	USING SHELTERS	PREGNANT / EXPECTING	UNDER 24 OR OVER 60
1 st Served	🏠	🏠	🏠	🏠	🏠	🏠	🏠
2 nd Served	🏠	🏠	🏠	🏠	🏠	🏠	
3 rd Served	🏠	🏠	🏠	🏠	🏠		
4 th Served	🏠	🏠	🏠	🏠			
5 th Served	🏠	🏠	🏠				

THE ABOVE CAN THEN BE FILTERED BY VI-SPDAT SCORE Now imagine we have a unit come available that is appropriate for Supportive Housing/Housing First or Intensive Case Management Clients and we need to match clients to that unit. We will take all clients from the HART list who hit all the categories and fall in the **1st Served Group** and that list of clients will be given to the Housing Provider. At this point, all things are relatively equal for the clients of the 1st Served Group, so the Housing Provider is free to choose any client from that list. If that list happens to be too large (10 or more names), we will apply the below additional filtering so that 1st Served Group is prioritized in the order that the Moncton community agreed upon.

1 ST SERVED GROUP PRIORITIZED IN THIS ORDER:	CHRONIC	LOCATION	VI-SPDAT
1	YES	SLEEPING ROUGH OR UNSAFE COUCH SURFING	13+
2	YES	SLEEPING ROUGH OR UNSAFE COUCH SURFING	9-12
3	YES	SHELTERED	13+
4	YES	SHELTERED	9-12

Alternatively, if there are no clients on the HART list that match all the categories for the 1st Served Group, then we move down to the 2nd served group and continue the process. This dynamic prioritization method will not only allow us to focus on housing clients in a more strategic order but will also give Housing Providers more choice than if we were to just give them 1 or 2 names each time a unit comes available.

Appendix D

Housing Assessment Review Team (HART) Terms of Reference 2020

Background

The Greater Moncton Homelessness Steering Committee (GMHSC) has made Coordinated Access a priority of the Greater Moncton's 5-year Community Plan to end homelessness 2014 – 2019. Over the winter of 2016, a consultant was engaged to conduct a literature review and community consultation to determine a recommended model of Coordinated Access for Greater Moncton. The community believed that the landscape and service locations of this community necessitated a decentralized model where any door is the right door for an individual to access support in finding housing and a placement committee would discuss each assessment as a group to determine which program best fits the needs of an individual.

These Terms of Reference define the purpose, process, and structure of this committee.

1. Term

The term for this committee is ongoing with an annual review at the end of each fiscal year (March 31).

2. HART

HART is a process for people experiencing homelessness to access housing services that is designed to meet the needs of the most vulnerable first by assessing their acuity and the capacity of HART agencies ability to meet their needs.

3. Defining Acuity

HART uses the Service Prioritization Decision Assistance Tool (SPDAT) and the Vulnerability Index SPDAT (Vi-SPDAT) to assist in determining the level of acuity of individuals seeking service. The committee will focus on individuals who meet the Community Prioritization List criteria (please refer to the Coordinated Entry System Guide for more information). While the primary focus of this committee will be to place those at highest acuity first, a variety of factors may be considered in client placement such as, but not limited to: housing arrears, ability to get NB power in a person's name, location of offered units and individual's preferences. HART will make every effort to be transparent in its prioritization process.

	Vi-SPDAT	SPDAT
Low acuity / No-intervention	0-3	2-12
Mid acuity – Transitional, moderate support	4-8	13-29
High acuity / Housing First	9+	30+

(Based on Region of Waterloo Community Services *SPDAT to Vi-SPDAT Formula Calculation for PATHS Youth and Adults*)

4. Committee Membership

Membership of HART is drawn from the staff of a wide range of agencies that serve homeless clients across the acuity spectrum with priority given to those who provide direct housing and/or support to individuals experiencing homelessness.

The intent of the membership is:

1. For partner agencies to add individuals to the HART By Name List (BNL)
2. For housing providers to acquire tenants from the HART BNL for their program
3. For housing providing and frontline agencies to cooperate around shared clients to assist them in obtaining services that best meet their needs

HART member agencies are:

- Crossroads for Women
- Ensemble
- FACT Horizon
- FACT Vitalite
- Greater Moncton Homelessness Steering Committee
- Harvest House
- House of Nazareth
- John Howards Society of SENB
- Salvation Army Family Services
- Salvus Clinic
- Social Development
- SUN Moncton
- Youth Quest Central
- Youth Impact
- YMCA of Greater Moncton – ReConnect
- YWCA of Greater Moncton

Guests:

HART agencies will use the discretion of the committee when extending invitations to relevant Guests. Guests are individuals who play a key role in the case management of a client and who are attending to provide additional information on that client. Guests will sign a confidentiality form and participate only in the discussion for the individual with which they are involved. Placement students may attend for full meetings depending on space and their placement role.

5. Membership Roles and Responsibilities

Data Lead

The Data Lead is responsible for the planning and facilitation of each meeting, according to the Terms of Reference and address any issues or matters in an orderly, efficient manner.

In addition, the Data Lead will follow these general guidelines:

- Ensure the Terms of Reference are up to date and reflect the purpose and vision of the group.
- Ensure the structure of the meeting is followed and time is respected.
- Guide the group through the prioritization process
- Keep the committee engaged, celebrating successes, and cultivate collaboration
- Responsible for completing all the client notes during the meeting.
- Ensure the completeness, timeliness, accuracy and consistency of placement notes and data collection related to the placement process.
- Document program gaps, identify needs of the team and identify questions around agency capacity. The GMHSC will use the information for informed decision-making, advocacy work and future planning.
- Ensure the standards set in the MOU are adhered to and provide background support by providing administrative support, scheduling, Terms of Reference documentation, ensuring the meeting rooms/facility are available, emailing the committee for meeting updates, providing technical support and managing the BNL.

General Membership:

- The roles and responsibilities of each member are outlined in the MOU.
- Members will accept referrals as per the triage model.
- Members will report to the group on the status of the referral.
- To the best of their abilities, members will review and update the status of clients on whom they have done intakes for and who have not yet been referred on to another provider
- Members will provide feedback on policies, process and operations to be included in the updates to the TOR.
- General members may be asked to facilitate a meeting in the event that the Data Lead is unable to attend.

6. Goals of the Committee

- To source housing and support for those that are chronically and episodically homeless.
- All members of HART will follow the process for housing and program placement (refer to Coordinated Entry System Guide) ensuring timely and efficient service delivery. All members of HART participate ethically in good faith, with respect and integrity towards the common goal of ending homelessness with a client centered approach.
- HART will document learnings on an ongoing basis and ensure operating procedures reflect these learnings.
- HART will work towards collecting and disseminating data regarding case management issues, service gaps, and clients who do not fit into HART criteria. The Data Lead, along with the Community Development Coordinator and the Greater Moncton Homelessness Steering Committee Leadership Council will prepare all information for presentation to the proper sources

for advocacy and policy change.

- HART operates under the principle that sharing of client information is necessary to ensure effective provision of services, continuity of care and efficient use of resources. For further information, please see HART Confidentiality Statement.

7. Meetings

HART will meet every second Tuesday from 1:00PM to 3:00PM. Communication for meetings will be via email. To request addition to the email distribution, please email the GMHSC System Planner: moncton.homelessness@gmail.com

If an agency is unable to attend a meeting, they are expected to email the Chair and Vice-chair to inform them. They can request referrals via email in their absence and for transparency, update the committee on the next meeting of the results of the client referral.

Meeting Preparation:

- Team members are to review their open cases, add client information to HIFIS 4, and send pertinent updates to the Data Lead by 4pm the Friday before the scheduled meeting.
- For new intakes: Completed Client Needs summary sheet sent to the Data Lead by 4pm the Friday before the scheduled meeting.
- Upon referral completion, the intake agency will connect with the individual and make introductions to Housing Provider or referral agency when possible.

Example of Meeting Agenda:

- Introductions (If required)
- Placements for housing- Review previously prepared prioritized list (dependent on housing stock available)
- Review BNL to ensure data is current – update active, inactive, and who is aging into chronicity
- Updates on program placements (if necessary)
- Celebrating Success – reporting on which clients have been housed and special success stories
- Trainings
- Other items
- Meeting close

8. Triaging & Program Matching

In ideal conditions, the focus of the committee will be to refer the most acute and vulnerable clients to programs with open spaces that are best suited to meet their needs. HART will document cases where clients do not meet HART criteria, and forward all documentation to the Community Development Coordinator.

The By Name List (BNL) helps determine appropriate selection of individuals for housing when a unit becomes available. Prioritization is based on Vi-SPDAT score, community identified priorities, and appropriateness of the unit. The committee will determine the individual who is the most appropriate match

for the unit based on their prioritization ranking, acuity, current known factors affecting their case and support services available at that time.

9. Placement Process

When a match is proposed, the intake agency will attempt to connect with the client and make introduction to the accepting agency within two days. Within seven days, the agencies will attempt twice to contact the client, each time using all of the means of contact provided by the client. Agencies will document all efforts made to notify the client in HIFIS.

The staff member accepting the referral will report to the team on all efforts made to engage the client.

Clients may refuse the program or programs may refuse the clients. There are several reasons why a placement may be rejected; regardless of the reason, notes must clearly articulate why the referral was not accepted.

Should they decline the housing referral, the client's status will remain active on the BNL. Consideration for client preference for program placement informs referrals, but due to acuity and available space, their preference may not be available. Reasons for program placement are communicated and discussed with clients so that they understand the reasons for the committee's decision.

10. Inactivation of Individuals

A conscious effort is made to identify and reach out to all individuals and families approaching the 90-day inactivity threshold. If an individual or family has had no contact with HART access points for 90 days, and they have had no shelter stays in HIFIS for the past 3 months, the individual or family will have their status changed to "Inactive" on the BNL.

If an individual or family appearing as "Inactive" on the BNL makes contact with a HART access point, their status on the BNL will be updated from "Inactive" to "Returned from Inactive". An updated Vi-SPDAT assessment may be required depending on length of time and changes in their circumstances.

The Data Lead will review the HART BNL monthly to identify individuals approaching 90 days of inactivity and contact HART members for updates before changing the status to inactive.

11. HART Housing Subsidies

HART has a partnership with the Regional Housing Office of Social Development, also known as New Brunswick Housing, to receive five subsidies or subsidized units per month (depending on availability of units) for housing prioritization from the BNL. Once received, these units remain HART units, allowing HART to recycle the subsidies for other tenants if the unit becomes available.

All HART agencies who provide housing will refer to the BNL for housing placements, and will notify HART when a unit becomes available. Each agency has their own unique requirements for housing, which will

determine who is prioritized for the available units. Please refer to the Coordinated Entry System Guide for further information.

Supporting Agency Responsibilities for HART Units and their tenants:

1. Ensure tenants of HART units sign the *HART Unit Service Agreement*
2. When setting up a tenant with a new subsidy agencies must follow the protocol provided by NB Housing in their document “You’ve found an apartment! – WHAT COMES NEXT?”
3. Ensure the Data Lead has the address and property owner information for the apartment unit.
4. Update HART as soon as you become aware that the unit will become available again so prioritization can begin for a new tenant.

12. Graduation from Supports

Clients in a HART unit who obtain and maintain a level of stability in their housing may discuss Graduation from Supports. If the housing support provider and the tenant agree that they no longer require supportive services, the support provider may request that the tenant graduate out of the program. Once determined, the housing support worker will request the transfer of the unit from the HART portfolio to the tenant. The following process will be required for this to become official:

1. Agency will present the case to the HART table.
2. If no further information is presented by other committee members and all agreed with the housing support provider’s recommendation, the System Planner will inform NB Housing of this decision in writing.
3. NB Housing will replace this subsidy with another as one becomes available.

13. Grievances and Appeals

In the event that a client presents a grievance with the placement process (their treatment by members or procedural issues) that cannot be resolved internally, a neutral mediator will be consulted to assist the parties in coming to a resolution. Please see the Coordinated Access System Guide for further instruction.

14. Governance & Reporting

The Committee seeks consensus on all decisions. Difficult issues requiring meaningful dialogue and decisions are referred to the Strengthening HART working group. Members can volunteer to participate in this working group. The working group will report to the team on identified solutions and recommendations. The committee will implement the recommendations of the working group.

Members Signature

Date

Housing Assessment Review Team (HART) Applicant Needs Pre-Screening Tool

Is the individual currently housed? Y/N * IF YES DO NOT MOVE ON

Agree to have a supportive housing team? Y / N

All documents added to HIFIS 4? Y / N HIFIS ID:

Client information:

Chronic:

Chronic: 6+months homeless in past year – not consecutively OR 18+ months in 3 years – not consecutively

Full Name:

Date of Birth:

Age:

Identified Ethnicity:

Indigenous: Y/N

Identified Gender:

Veteran Status: Y / N

Pregnant: Y / N N/A

Pets: Y / N

Current Sleeping arrangements:

Existing family or community supports:

SD Information and Consent

VI-SPDAT Score: _____ SPDAT Score: _____ SPDAT DATE: _____

Social Development Consent Form Expiry Date: _____

NB Housing Arrears: Y / N

If yes, Amount? _____ Confirmed? Y / N

Date Confirmed:

Name of NB Housing agent:

Ability to Get NB Power: Y / N

If no, Amount? _____ Confirmed? Y / N

Tri-Morbidity

Physical Health:

Mental Health:

Addictions:

Housing requirements

Smoking / Non-Smoking:

Housing requirements:

Does individual have mobility issues, will they have issues with basement or ground floor units

Is client Document Ready for Housing?

*Does client have income tax returns, bank statements, need Government Issued ID to get approved for social assistance, open a bank account, obtain a criminal record check. Does client agree to housing support team? Is client on wait list, has arrears been confirmed, can they have power in their name? These questions need to be confirmed for yes to be selected. If no, document what needs to be worked on, and it will be updated on the BNL

Additional Notes:

Program Recommendation:

Completed By: Agency Name: _____ Employee: _____

**Please forward this along with signed SD / HART Consent forms to
moncton.homelessness@gmail.com or by fax - (506) 854-2057**

HART Coordinated Entry System - Door Agency Checklist

Before Administering the Common Assessment Tool (VI-SPDAT)



Determine if the family or individual is experiencing homelessness in one of the following ways:

Unsheltered: Living on the streets or in places not intended for human habitation

Emergency Sheltered: Staying in overnight shelters for people experiencing homelessness, as well as shelters for those impacted by family violence

Provisionally Accommodated: Those whose accommodations is temporary or lacks security of tenure (e.g. couch surfing)

Risk of Homelessness: Referring to people who are not homeless, but whose current economic and/or housing situation is precarious or does not meet public health and safety standards (e.g. Rooming house set to close by order of fire marshal, or house with no utilities like power, heat and water.



Review and sign the HART Release of Confidentiality Statement

Please read and check all the boxes pertaining to this statement, and have the individual or family sign once they understand



Review and sign Social Development Consent Forms

Administer the correct Common Assessment Tool (CAT)



Complete the Housing Assessment Review Team (HART) Applicant Needs Pre-Screening Tool



Determine if the family or individual is already on the current By- Name List

A copy of the HART Prioritization list is available through the Drop Box, but HIFIS 4 will be our By-Name List. Please ensure individual or family is added to HIFIS 4.



Determine if the family or individual wants Supportive Housing.

Please be sure to explain in full detail what supportive housing is and what it isn't. If the individual declines supportive housing, please ensure they are still added to HIFIS 4, and they are added to the NB Housing list.



Make sure the correct CAT is being administered

TAY-VI-SPDAT: Independent youth, 16-24 Years old

VI-SPDAT: Individual adults, 25 years and older, or a couple with no children (Please administer a VI-SPDAT for each individual)

F-VI-SPDAT: Parent/Guardian with dependent children under 18 years old

After administering the Common assessment tool:



Ensure client's name is added to the NB Housing list by calling 1-866-426-5191 with the client. Document time of call, agent name, and confirm any arrear amounts



Verify any NB Power arrears with client by calling NB Power at 1-800-663-6272



Verify if the individual or family needs access to Government Issued Photo ID in order to apply for Social Assistance, obtain a bank account, or obtain a criminal record check. If yes, please do a warm referral to YMCA ReConnect



Send Pre-Screening Summary sheet by fax or email to the Community Development Coordinator, the Friday before the HART meeting, no later than 4 P.M. (FAX 506-854-2057 EMAIL: moncton.homelessness@gmail.com)



Please ensure all relevant documents, including signed consent, have been uploaded to HIFIS 4. If you do not use HIFIS 4, please keep all original documents either in a locked filing cabinet, or in a scanned and password protected folder.

**MEMORANDUM OF AGREEMENT BETWEEN
HOUSING ASSESSMENT REVIEW TEAM (HART) STAKEHOLDERS**

This Memorandum of Agreement is entered on this ____ day of _____ 20__ by and between the community stakeholders listed below. This is a non-binding agreement that all parties have entered into in good faith.

- **BACKGROUND.** The Greater Moncton Homelessness Steering Committee (GMHSC) has made common intake and assessment (CIA) a priority of the Greater Moncton’s 5-year Community Plan to end homelessness 2014 – 2019. Over the winter of 2016 a consultant was engaged to conduct a literature review and community consultation to determine a recommended model of CIA for Greater Moncton. The community believed that the landscape and service locations of this community necessitated a decentralized model where any door is the right door for an individual to access support in finding housing and a placement committee would discuss each assessment as a group to determine which program best fit the needs of an individual.
- **GOAL AND OBJECTIVE.** To connect community stakeholders and execute the vision of establishing a unified partnership of collaboration with the common purpose of providing a system of care that ensures that individuals experiencing homelessness are referred to the agency best situated to meet their housing needs and are prioritized for housing through Coordinated Access System.
- **ROLES AND RESPONSIBILITIES.** HART stakeholders agree to the following:
 - Meetings. Attend regularly scheduled meetings.
 - Confidentiality. The HART process acknowledges that the sharing of information is important in ensuring that clients receive the best level of service to meet their needs. In order to safeguard and respect the integrity of the individual, the private and confidential information will only be disclosed to personnel that are identified in writing by the stakeholders in this agreement, and as per conditions described in the HART Consent form.
 - HART members will also keep confidential sensitive information shared in stakeholder discussions related to organizations and personnel.
 - Stakeholders further agree that during their time with the HART and after their possible departure, they shall not disclose to any person confidential information whatsoever of which they became aware of during their time with the HART.
 - Breach of Confidentiality. Where one of the stakeholders has reason to believe that another is in breach of its obligations in regard to maintenance of confidentiality, it will immediately communicate the concern to the Chair to discuss and identify a resolution. Upon investigation and review, action will be taken based on the severity of the breach. (Stakeholders to identify possible courses of actions/consequences).
- 4. **DURATION OF AGREEMENT AND TERMINATION PROCESS.** This Memorandum of Agreement is at-will and may be modified or amended at any time with the mutual consent of the stakeholders.
- 5. **SIGNED CONSENT TO THIS MEMORANDUM OF AGREEMENT BETWEEN HART STAKEHOLDERS.**

Representative & Title	Organization	Signature	Date