Terms of Reference

Coordinated Access and Assessment (CAA)
Family Placement Committee (FPC)

# Background

Throughout 2012 and 2013 the Calgary Homeless Foundation (CHF) engaged in a thorough community consultation plan regarding Coordinated Access and Assessment (CAA); the community was vocal about participating in the placement of *participants* (individuals experiencing homelessness who access homeless serving agencies) in their housing programs. In order to respect agency autonomy over participant program placements, the concept of Placement Committees was developed. The committees would allow for dialogue, discussion and placements to be made in a group rather than one agency making the decisions in silo.

Much of the policy, process and practices are outlined in the CAA Manual. These Terms of Reference help define the purpose, process, and structure of this committee.

# Purpose

The CHF has a defined System of Care with a spectrum of funded services available for individuals experiencing homelessness (<http://calgaryhomeless.com/content/uploads/SSPF_V116_2017-03-15.pdf>). The goal is to develop an integrated system of care with CAA at the centre.



The primary purpose of this Family Placement Committee (FPC) is to match “Family” participants as defined within the ToR, into the most appropriate housing and/or services available through the agencies represented at the Committee. This is done through a triage process as agencies dialogue, and discuss participants’ needs as found on the CAA NSQ and Housing Plan.

# Term

The term for this committee is from 2018 to 2023. The Last update is September 2018.

# Defining Families served at CAA

For the purposes of this Terms of Reference (ToR) and the committee, Family is defined as ones primary social group. Families with **dependent children** are a group of people affiliated either by lineage, affinity (by marriage or any other relationship like sibling families, inter-generational etc.), including informal significant support relationships, where individuals identify as family members that form families within a community that is fluid. Women who are pregnant and expecting to parent or a parent whose children are in temporary care by foster or kinship.

# Prioritization

In order to best match families to the most appropriate services and available housing, CHF utilizes several data points including the Needs and Services Questionnaire (NSQ) with Chronicity of Homelessness and Engagement being prioritized with 50% of available placement spots being dedicated to families currently housed in shelters and 50% dedicated to persons not currently residing in a shelter.

For the purposes of this Terms of Reference and the committee the area that prioritization will primarily focus on is split into two categories as defined below.

|  |  |
| --- | --- |
| Data Sets | Indicator |
| Chronicity | Chronic Shelter/Self-Report Data |
| Engagement  | Last Check In Date with Housing Strategist |

Families with completed NSQs are maintained in CHF’s Homeless Management Information System (HMIS) system and a list of these families with these prioritization factors will be brought to the FPC (known as the CAA triage Spreadsheet) for triaging and placement purposes. Agencies with programs that serve families with the corresponding indicators will then pick up families based on the triage methodologies contained within this ToR.

In the event that two families have similar background and present similarly with chronicity and Engagement then the Length of time on triage list will be used to help prioritize a housing placement.

### Exceptions

While the primary focus of this committee will be prioritizing Chronicity and Engagement, a variety of factors can be considered upon participant placement which can be considered.

For example, programs that attend FPC and can operate outside of these prioritization indicators include Non-Market Housing programs such as Calgary Housing Company (Bridging the Gap) and CUPS Graduated Rent Subsidy, Graduate Housing Program or CUPS Community Development Program. These programs have their own Terms of Reference (TOR) that better define their participant requirements and intake processes (please refer to Post Case Management Programs Terms of Reference).

In addition, niche programs who support families with less intensive needs including Children’s Cottage Society Rapid Rehousing program will utilize different service prioritization factors such as VI-SPDAT of 10 or lower, experience of Transitional Homelessness and/or preventing Chronic Homelessness, and Income.

# Committee Membership

Membership of the FPC will be drawn from the staff of a wide range of homeless serving partner agencies that focus on families (as defined above). The intent of the membership is for agencies to have representation to support the acquisition of families into their program or to provide support to other agencies for this matter.

The Placement Committee will ask their management to attend if there are issues needing to be resolved that cannot be addressed with the current membership.

Current partner agencies that form the membership of the FPC include:

|  |  |  |
| --- | --- | --- |
| Logo | Agency | Program |
| H:\Communications\01_CHF BRAND RESOURCES\LOGO\FOR SCREEN\PRIMARY\PNG\chf_logo_primary_PMS-200.png | Calgary Homeless Foundation | System Planning |
| Image result for distress centre calgary | Distress Centre | CAA |
|  | Trellis | Sustainable Families |
| \\chf-fps.calgaryhomeless.ad\Data$\Shared\Communications\08_COMMS RESOURCES\02_RESOURCES\GRAPHICAL Resources\Community & Partner Logos\ChildrensCottageSocietyLogo.png | Children’s Cottage Services | HomeLinksRapid RehousingAdaptive Case Management |
| Closer to Home Community Services | Closer to Home | Home Again |
| Image result for CUPS calgary | CUPS | Graduated Rent Subsidy & Graduate Housing ProgramCommunity Development |
| \\chf-fps.calgaryhomeless.ad\Data$\Shared\Communications\08_COMMS RESOURCES\02_RESOURCES\GRAPHICAL Resources\Community & Partner Logos\DiscoveryHouseLogo.jpg | Discovery House | Community Housing ProgramAdaptive Case Management |
| \\chf-fps.calgaryhomeless.ad\Data$\Shared\Communications\08_COMMS RESOURCES\02_RESOURCES\GRAPHICAL Resources\Community & Partner Logos\Inn-from-the-Cold-SocietyLogo.jpg | Inn From the Cold | Housing with Intensive SupportAdaptive Case Management |
| Metis Calgary Family Services  | Metis Calgary and Family Services | Rainbow Lodge |

### FPC -System Partners & Guests

System Partner Guests are welcome to attend Placement Committee as long as they understand the purpose and goals of the committee and are respectful of the process. The committee can decide to prohibit guests from attending if the common goals are not respected, understood or followed. If a member would like to invite a guest, please notify the Chair or Co-Chair by email prior to the meeting. Members have a responsibility to help manage their guests’ expectations; if they are attending to advocate for an individual they may not get picked up that meeting dependent on the ToR prioritization and available spaces. The guest will be introduced and the goals of the committee (Terms of Reference) should be reviewed by the guest prior to attending. If a guest would like to advocate for an individual there will be time at the beginning of the meeting and they do not need to stay for the entire meeting to protect individuals’ confidentiality.

They will be asked to sign a confidentiality form. A considerable amount of sensitive information can be shared at the meetings and should not be recorded or shared by System Partners once they leave the meeting.

If a System Partner is a regular guest it is requested that there is consistent representation from each agency/system partner to ensure that there is a consistent understanding of the rules, roles and responsibilities to ensure the effectiveness of the table and to help protect information shared at the table. Regular guests are welcome at the placement table as they provide collateral and assist with participant connections.

# Membership Roles & Responsibilities

Membership is agency based and not necessarily program based. To fulfill the goals of the FPC representation must be appropriate, the regular attendee should be able to speak to multiple programs under one agency, or in the case that an agency has several programs at FPC one person from each program could attend under one agency.

Regular attendance isn’t tied to an individual’s position or title, what is important is the individual’s knowledge to speak to persons who may be discussed for placement, and how to screen/pick up appropriate referrals and transfers on the list for the program. It is also expected that regular attendees are familiar with the different types of programs that exist throughout each sector, there is a CHF Resource Guide to assist with this, and programs speak regularly at each meeting to enhance knowledge.

### Expectation of Participation

The placement process is a collaborative one and committee members are expected to attend meetings regardless of whether or not their program has spaces available. If an agency is unable to attend a meeting, they can request referrals via email in their absence and for transparency, update the committee at the next meeting of the results of the participant referral. Regular attendees for an agency/program are expected to be present at each meeting limiting side conversations, stay for the entire meeting, and engage in conversation outside their placement that require the committee to work together on a solution. A contact list will be shared by CHF to all regular attendees.

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| --- | --- |
| Role | Responsibilities |
| FPC Chair | This Committee will be Chaired and Co-Chaired by CHF System Planners. * Ensure the structure of the meetings is followed and time is respected.
* Guide the group through difficult decisions; if consensus cannot be achieved items will be tabled for the next meeting or specific plans will be implemented to find resolution on contentious issues (i.e. Agency leadership consulted).
* Ensure the Placement Term of Reference is followed
 |
| FPC Co-Chair | The Co-Chair is responsible for completing all the family HMIS notes. It is important the notes make sense to people that are not in attendance at the meetings. * All referrals and exits will be documented, completed and entered into HMIS.
* Prepare spread sheets and complete necessary set up for meetings.
* In accordance with the Data Quality Plan the Co-Chair will ensure: completeness, timeliness, accuracy and consistency of placement notes and data collection related to the placement process.
* The Co-Chair will document learnings from each meeting and ensure the CAA Manual reflects these learnings.
* Ensure the Terms of Reference are up to date and reflect the purpose and vision of the group.
* Designated Co-chair will communicate any changes in meetings via email or telephone to the committee.
* In conjunction with the Co-Chair, CHF Staff will work to collect and disseminate data regarding families who do not fit into the System of Care. This information should be shared with partners from other systems and outside our system of care (health, justice, treatment centres) in the form of briefing notes provided by CHF. The CHF team will share these documents with the committee prior to distribution for feedback and approval.
 |
| General Membership | Members will:The roles and responsibilities of each member are outlined in the CAA Manual and MOU. * The Placement Committee is authorized to make referrals to housing programs with open spaces as indicated by program staff and Service Point data.
* The Placement Committee will only address placement of people into programs with available space based on triaging those with the highest need and program criteria.
* All case management activities within the housing programs are not in the scope of this committee.
* The Placement Committee will provide feedback on policies, process and operations to be included in the updates of the CAA Manual.
* Inform the group of how many placement spots they have available.
* Accept referrals as per the triage model.
* Report back to the group on the status of the referral.

Provide insight on participant/program fit, respectfully challenging the table when required and appropriate.* Respect agency and program autonomy.
 |
| Calgary Homeless Foundation  | The CHF will send a member from the System Planning Team to observe placement committee meetings and fill the role of Co-Chair. In addition to Co-Chair, their role at the meetings is to document program gaps, identify needs of the committee and identify questions around agency capacity. The CHF will use the information data and for informed decision making, advocacy work and future planning. In addition, the CHF will provide background support by providing administrative support, HMIS support, community communications, and coordination efforts of the CAA program.  |

# Goals of the Committee

1. The Placement Committee will help ensure housing programs within the System of Care maintain a minimum of 95% occupancy as per CHF KPIs.
2. All members of the Placement Committee will follow the process for program placement (as stated in this Terms of Reference) ensuring timely and efficient service delivery as defined in the Standard Operating Procedures.
3. All members of the Placement Committee will participate in good faith, with respect, integrity and ethically towards the common goal of ending homelessness with a participant centered approach.
4. The Placement Committee will document learnings from each meeting and ensure the Standard Operating Procedures reflects these learnings.
5. The Placement Committee will work towards collecting and disseminating data regarding individuals who do not fit into the System of Care. This information should be shared with partners from other systems and outside our system of care (health, justice, treatment centres) in the form of briefing notes provided by CHF.
6. Placement Committee operates under the principle that sharing of participant information is necessary to ensure effective provision of services, continuity of care and efficient use of resources.

# Meetings

|  |
| --- |
| The APC will meet: |
| Date: | every Tuesday |
| Time: | 9:00AM to 10:00AM |
| Location: | Virtual |

**Note:** Communication for meetings will be via email and in person. If a new staff would like to be added to the email distribution list they must email Calgary Homeless Foundation: CAA@calgaryhomeless.com

# Meeting Agenda

|  |
| --- |
| Agenda Item |
| 1. Introductions (if required)
 |
| 1. Agency updates
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| 1. Updates on program placements:
	1. “Leave on one week”
	2. “Exit success”
	3. “Return to Triage List”
	4. “MIA”
	5. “Needs Contact Info”
	6. “Needs Update”
 |
| 1. Celebrating Success – this is the time during the meeting program will report which participants have been intake into the program
 |
| 1. Transfers
 |
| 1. NSQ (VI-FSPDAT) reviewed and through collaboration and available program spaces matches will be made by the group.
 |
| 1. Other agenda items as required
 |
| 1. Committee meeting end
 |

**Note:** In the case that there are no participant spaces in the system of care, the committee can elect to have the option to meet and use this time to discuss housing options outside CHF funded programs or other discussions as necessary. The committee will meet to make recommendations to CHF on funding based on gap analysis.

In the case that the meeting needs to be cancelled, it is the Chair and Co-Chair’s responsibility to inform the group of the cancellation with minimum of one hour notice through email.

Triaging & Program Matching

In ideal conditions, the focus of the committee will be to refer individuals experiencing chronic homelessness. The Committee will try not to refer families whose needs exceed the program’s services.If a family does not have children in their care, the committee may decide to de-prioritize them and offer the program placement to the family with children in their care.

* For all families without children in their care, collateral with Children’s Services will be preferred, and thus should be completed upon intake into CAA by the original Housing Strategist. Based on the collateral information regarding reunification, a placement may or may not be prioritized at the committee’s discretion. The committee may also unanimously vote to transfer the family to the Single Adult Placement Committee.
* Vulnerabilities for each family are determined on an individual basis. The placement committee has developed triage questions (Appendix A) to support in determining a placement between families of the same or similar acuity scores. The following are specific vulnerability factors to be considered (as reflected in the triage questions):

|  |
| --- |
| Category |
| Chronicity  |
| Safety factors |
| Current shelter situation |
| Physical/mental health conditions |
| Pregnancy and due date |
| Children’s Services involvement (children in care) |

Families that are highly engaged and checking-in with outreach staff or SORCe on a regular basis will be considered for placement above individuals who have no level of engagement (so long as other triage factors are the same as comparative individuals).

There are several examples of why individuals are not accepted in programs; individuals may refuse the program or programs may refuse the individuals. Regardless of the reason, HMIS notes must clearly articulate why the referral was not accepted.

The participant should be given the option to be placed back on the triage list. Participant choice for program placement or preference should always be respected; it should be considered but it does not mean they will get into the program due to triage factors and open spaces.

If a participant is no longer in need of a match they will be removed from HMIS. If they re-connect, their NSQ should be updated in HMIS in order for their assessment to be reviewed at the next Placement Committee.

Families are deemed MIA if staff members have attempted contact more than three times. This is done case by case; the participant is given a minimum of three weeks to make contact before they are deemed MIA. Once a participant makes contact, an HMIS note will be made and their CAA status will be changed and they will be put back on the triage list.

# Placement Process

Once a family is matched to an agency & program at FPC, the participant is then referred to the agency & program through HMIS.

**Terminology**

The agency is responsible for reporting on the outcome of the participant placement back to the APC using the following standard language:

# **Transfer**

The purpose of CAA is to match participants to programs where they will experience the highest level of success. The CAA also recognizes that participants require different levels of support at different times in their life; they may need more support or less support than their current program can offer. As a guiding principle, CAA should always work to ensure participants do not return to homelessness if possible. This means that CAA must provide efficient and effective avenues for participants to transfer to more appropriate supports that may be available in the System of Care as outlined below:

**Transfer Principles:**

* Informed consent, including knowledge about the housing and services available from the potential receiving programs, is a prerequisite of the transfer process.
* All potential transfers must be reviewed by CAA placement table, if deemed an appropriate transfer then the required supporting process and procedures to flag transfer in 'Program Transfers' in HMIS is completed.
* All transfers must be done through "Warm Transfer", this means that the program who is requesting the transfer will provide continued support to the participant until the new program has appropriately and fully accepted the participant into the program and is actively supported (up to 3 months as outlined in the Case Management Standards that can be accessed here).
* Expectation of a warm transfer is that there will be a meeting with both caseworkers and the program participant. A transition case plan will be created to reflect current goals and warm transfer. This will be aided by the Warm Transfer Summary which is to be completed by the referring program once a transfer referral has been made.

**Sector Transfers:**

* The CAA encompasses the Adult, Youth, and Family sectors, which form the System of Care as a whole.
* If a participant is flagged for transfer to another CAA sector, the current CAA sector table will review the transfer and rationale will be required to determine what supports are available that the current sector cannot provide, prior to placing the participant on the requested CAA sector list. If deemed an appropriate transfer then the required supporting process and procedures to flag transfer in 'Program Transfers' in HMIS is completed.
* Once HMIS process is complete for sector transfer, a representative from the participant transfer agency may (recommended) present participant at the receiving sector placement table.
* If the receiving agency has sound rationale proving they are unable to support the participant in their program, the transferring program will work with the participant to find an alternate solution.

**Warm Transfer Summary:**

Once a transfer referral is made at any of the three placement tables it is expected that the referring agency complete the Warm Transfer Summary in HMIS to assist with a warm transfer to the intaking agency.

The Transfer Process

Unique Sector Supports

Each sector within the System of Care (Adults, Youth, and Family) is made up of a portfolio of agencies and programs that provide services and supports that are tailored to the unique needs of Adults, Youth, and Families. For a detailed overview of what supports and programs are available, please see the Resource Guide (<http://calgaryhomeless.com/content/uploads/ResourceGuide_FamilySector_2018_07_19.pdf>).

# Grievances & Appeals

Grievances should be a standing item on the agenda, so we can work out particularly for practice details.

There are two types of grievances related to CAA. For simplicity’s sake, the participant has been directed to bring any grievances forward to the CAA team at SORCe. The CAA team at SORCe should direct the participant as appropriate to their type of grievance per the descriptions below:

|  |
| --- |
| Grievance Processes for Participants Presenting at SORCe |
| Type | **Examples** | **Subcategory** | **Process to Follow** |
| CAA General | * Participant thinks their confidentiality has been breached at placement.
* Participant wants to withdraw from CAA but is informed that their electronic record will continue to exist (locked).
* Participant is frustrated they have not been placed yet.
* Participant thinks a decision was made that did not comply with CAA Policies or Standard Operating Procedures.
* Participant feels that their assessment is not reflective of their situation.
 | * CAA Processes and Protocols at SORCe
 | * CAA staff at SORCe will follow Distress Centre protocols for addressing participant grievances.
* If participant still unsatisfied with grievance procedure, can pursue grievance with CHF per the grievance process for CHF participants with grievance against CHF funded agency that has not been resolved at the agency level.
 |
| * CAA Processes and Protocols at Another Agency
 | * CAA staff at SORCe will document the details of the grievance and work collaboratively with CHF to determine next steps.
* If necessary, CHF will engage the agency to enact their grievance process and correct gaps in process.
 |
| * CAA Placement or HMIS
 | * CAA staff will document the details of the grievance and work collaboratively with CHF to determine next steps.
* CAA staff will communicate the outcome to the participant.
* If participant still unsatisfied with grievance procedure, can pursue grievance with CHF per the grievance process for CHF participants with grievance against CHF funded agency that has not been resolved at the agency level.
 |
| Housing Strategist | * Participant feels they were not treated fairly by the Housing Strategist
 | * CAA Housing Strategist at SORCe
 | * CAA staff at SORCe will follow Distress Centre protocols for addressing participant grievances.
* If participant still unsatisfied with grievance procedure, can pursue grievance with CHF per the grievance process for CHF participants with grievance against CHF funded agency that has not been resolved at the agency level.
 |
| * CAA Housing Strategist at Another Agency
 | * CAA staff will document the details of the grievance and work collaboratively with CHF to determine next steps.
* CAA staff will communicate the outcome to the participant.
* If participant still unsatisfied with grievance procedure, can pursue grievance with CHF per the grievance process for CHF participants with grievance against CHF funded agency that has not been resolved at the agency level.
 |

# Governance & Reporting

The Committee seeks consensus on all placement decisions and Terms of Reference policies.

For difficult issues requiring meaningful dialogue and decisions, working groups will be formed. Members can volunteer to participate in working groups. The working group will report back to the committee on identified solutions and the committee will implement the decisions. Working groups must document their findings to be included in the Terms of Reference Appendices.

The Committee Reports to:

* Each representative on the Committee will report to their own agency’s leadership.
* The Committee representatives will report back from our respective agencies to the group.
* If an agency cannot send a member to a meeting an email to the Chair and/or Co-Chair should be sent.
* If attendance is not at all possible for one or several members (i.e. due to weather), the meeting will continue without them; at the agency’s request placement decisions will be made and forwarded to the agency not attending. The Co-Chair will contact the agency with a follow-up.
* Co-Chair will make decisions if there is an emergency referral and no one can attend. Appendix A

**Triage Questions – Family Placement Committee**

**Principles**

1. Families must meet program and table criteria. Where family or homeless status is in question or likely to change, further information is considered.
2. Families who are most vulnerable with the longest history of homelessness are prioritized. Between participants with similar acuity, those whose safety is more threatened by their housing status are prioritized.

**Triage Questions**

Principle 1

* Are there dependent children in their care?
	1. If Children’s Services (CS) is involved (or pregnant with previous PGOs), is there collateral information from CS regarding status, timeline, and likelihood of return?
	2. If children are in others’ care without CS status, is there a plan for their return? Is the situation formal or informal?
	3. If pregnant, when is the participant’s due date? Priority is given to participants who are closer to giving birth and women who have a high-risk pregnancy.
* Homelessness status
1. If couching, how safe is the couching situation? How likely to break down? Is their stay putting the host’s housing at risk?
2. If in transitional housing, how long can they stay?
3. Will housing status impact family reunification?

4. Is there history of DV affecting the current state of homelessness?

5. Does the family require case management?

Principle 2

* What factors may make staying in the homeless situation especially risky, or less risky for families?
	1. E.g. cognitive capacity, mental health, addictions, ESL, physical health, presence of and age of children
	2. Does the family have a history of chronic, frequent, or recent homelessness?
	3. Are natural or formal supports present? Are there other resources available to the family that increase their likelihood of being able to exit homelessness without case management?