

Performance Management Cheat Sheet

A quick and easy review of the expectations each program

SHELTER/TRANSITIONAL HOUSING PROGRAMS						
PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT <i>FAM/EMPath</i>	GOALS <i>Housing Stability Plan</i>	OTHER OUTCOMES
Compass Family Shelter	<p>1x/week engagement for 60 minutes total</p> <p>Engagement Type =</p> <ul style="list-style-type: none"> • Case Management • CAC Engagement 	<p>Intake</p> <ul style="list-style-type: none"> • Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> • Facility = Compass Family Shelter <p>Program Exit</p> <ul style="list-style-type: none"> • Living situation when exiting program 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>At intake</p> <p>Update quarterly</p>	<p>At intake</p> <p>Update quarterly or when goals are completed</p>	12 month follow up calls
Clara House	<p>1x/week engagement for 60 minutes total</p> <p>Engagement Type =</p> <ul style="list-style-type: none"> • Case Management 	<p>Intake</p> <ul style="list-style-type: none"> • Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> • Facility = Clara House <p>Program Exit</p> <ul style="list-style-type: none"> • Living situation when exiting program 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>At intake</p> <p>Update quarterly</p>	<p>At intake</p> <p>Update quarterly or when goals are completed</p>	12 month follow up calls
CUAV	<p>1x/week engagement for 60 minutes total</p> <p>Engagement Type =</p> <ul style="list-style-type: none"> • Case Management • Room Check • Wellness Check 	<p>Intake</p> <ul style="list-style-type: none"> • Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> • Facility = Name of hotel/motel <p>Program Exit</p> <ul style="list-style-type: none"> • Living situation when exiting program 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>At intake</p> <p>Update quarterly</p>	<p>At intake</p> <p>Update quarterly or when goals are completed</p>	12 month follow up calls

HOUSING PROGRAMS

PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT <i>FAM/EMPath</i>	GOALS <i>Housing Stability Plan</i>	OTHER OUTCOMES
C-Cares FLEX POOL	<p>At referral/intake:</p> <ul style="list-style-type: none"> • 1st outreach within 5 days • Intake w/i 10 days of 1st client engagement <p>First 90 days housed:</p> <ul style="list-style-type: none"> • 1x/week outreach • 1x/month home visit <p>After 90 days housed:</p> <ul style="list-style-type: none"> • 2x/month outreach • Quarterly home visit <p>Engagement Type =</p> <ul style="list-style-type: none"> • Initial Outreach – <i>only at referral/intake</i> • Intake – <i>only at referral/intake</i> • Case Management • Home Visit • Recertification 	<p>Intake</p> <ul style="list-style-type: none"> • Living situation when entering program <p>Enrolled [HoLo]</p> <ul style="list-style-type: none"> • Living situation when client secures housing (or moves while in program) • Living Situation = Rental by Client, subsidized or below market rate <p>Program Exit</p> <ul style="list-style-type: none"> • Living situation when exiting program (if client exits) 	<p>At intake - Certification</p> <p>Update annually – Recertification or if income changes</p>	<p>At intake – <i>abbreviated</i></p> <p>When housed</p> <p>Update quarterly</p>	<p>When housed</p> <p>Update quarterly or when goals are completed</p>	<p>12 month follow up calls <i>(for any exited clients)</i></p>
C-Cares HOUSING LADDER	<p>At referral/intake:</p> <ul style="list-style-type: none"> • 1st outreach within 5 days • Intake w/i 10 days of 1st client engagement <p>First 90 days housed:</p> <ul style="list-style-type: none"> • 1x/week outreach • 1x/month home visit <p>After 90 days housed:</p> <ul style="list-style-type: none"> • 1x/month outreach • 1x/year home visit <p>Engagement Type =</p> <ul style="list-style-type: none"> • Initial Outreach – <i>only at referral/intake</i> • Intake – <i>only at referral/intake</i> • Case Management • Home Visit • Recertification 	<p>Intake</p> <ul style="list-style-type: none"> • Living situation when entering program <p>Enrolled [HoLo]</p> <ul style="list-style-type: none"> • Living situation when client secures housing (or moves while in program) • Living Situation = Rental by Client, subsidized or below market rate <p>Program Exit</p> <ul style="list-style-type: none"> • Living situation when exiting program (if client exits) 	<p>At intake - Certification</p> <p>Update annually – Recertification or if income changes</p>	<p>At intake – <i>abbreviated</i></p> <p>When housed</p> <p>Update annually</p>	<p>When housed</p> <p>Update annually or when goals are completed</p>	<p>12 month follow up calls <i>(for any exited clients)</i></p>

PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT <i>FAM/EMPath</i>	GOALS <i>Housing Stability Plan</i>	OTHER OUTCOMES
C-Home	<p>At referral/intake:</p> <ul style="list-style-type: none"> 1st outreach within 5 days Intake w/i 10 days of 1st client engagement <p>First 90 days housed:</p> <ul style="list-style-type: none"> 1x/week outreach 1x/month home visit <p>After 90 days housed:</p> <ul style="list-style-type: none"> 2x/month outreach 1x/month home visit <p>Engagement Type =</p> <ul style="list-style-type: none"> Initial CM Outreach – <i>only at referral/intake</i> CM Intake – <i>only at referral/intake</i> Case Management Home Visit Recertification Exit Planning 	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled [HoLo]</p> <ul style="list-style-type: none"> Living situation when client secures housing (or moves while in program) Living Situation = Rental by Client, subsidized or below market rate <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake - Certification</p> <p>Update quarterly – Recertification or if income changes</p>	<p>At intake – <i>abbreviated</i></p> <p>When housed</p> <p>Update quarterly</p>	<p>When housed</p> <p>Update quarterly or when goals are completed</p>	<p>12 month follow up calls</p>
CHLS	<p>Pre-housing search:</p> <ul style="list-style-type: none"> 1st outreach within 5 days Intake w/i 10 days of 1st client engagement <p>During housing search:</p> <ul style="list-style-type: none"> 1x/week outreach <p>Engagement Type =</p> <ul style="list-style-type: none"> Initial HoLo Outreach – <i>only pre-housing search</i> HoLo Intake – <i>only pre-housing search</i> Housing Search Lease up 	<p>For SF Home Cases Enrolled</p> <ul style="list-style-type: none"> Living situation when client secures housing (or moves while in program) <p>For CHLS Cases Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit <p>ALL During Housing Search</p> <ul style="list-style-type: none"> Housing Application for each application submitted 	<p>At intake</p>	<p>N/A</p>	<p>N/A</p>	<p>12 month follow up calls</p>

PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT <i>FAM/EMPath</i>	GOALS <i>Housing Stability Plan</i>	OTHER OUTCOMES
The Margot	<p>6 CM sessions within first 6 months</p> <p>Engagement Type =</p> <ul style="list-style-type: none"> Case Management 	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> Facility = 1321 Mission <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake - certification</p> <p>Update quarterly – recertification or if income changes</p>	<p>At intake</p> <p>Update annually</p>	<p>At intake</p> <p>Update annually or when goals are completed</p>	<p>12 month follow up calls <i>(for any exited clients)</i></p>
AFT	<p>1x/month engagement for 60 minutes total</p> <p>2x/month outreach</p> <p>Engagement Type =</p> <ul style="list-style-type: none"> Case Management 	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> ONLY if client moves while in program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>At intake</p> <p>Update quarterly</p>	<p>At intake</p> <p>Update quarterly or when goals are completed</p>	<p>12 month follow up calls</p>
CCAP	N/A	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> ONLY if client moves while in program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	N/A	N/A	N/A	<p>Financial Transaction to log Problem-Solving Funds</p> <p>12 month follow up calls</p>

PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT <i>FAM/EMPath</i>	GOALS <i>Housing Stability Plan</i>	OTHER OUTCOMES
C-Rent <i>(Eviction Prevention + Move-In)</i>	N/A	Intake <ul style="list-style-type: none"> • Living situation when entering program Enrolled <ul style="list-style-type: none"> • ONLY if client moves while in program Program Exit <ul style="list-style-type: none"> • Living situation at exit 	At intake	N/A	N/A	Financial Transaction to log assistance provided 3 and 12 month follow up calls
C-Rent <i>(Financial Counseling)</i>	N/A	N/A	N/A	N/A	At intake At exit or when goals are completed	Intervention Tracker

SELF-SUFFICIENCY PROGRAMS

PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT	GOALS	OTHER OUTCOMES
FRC <i>(Case Management Only)</i>	<p>1x/month engagement for 60 minutes total</p> <p>Engagement Type =</p> <ul style="list-style-type: none"> Case Management 	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> ONLY if client moves while in program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>FAM</p> <ul style="list-style-type: none"> At intake Update quarterly 	<p>At intake</p> <p>Update quarterly or when goals are completed</p>	N/A
CCSS	<p>After assignment to CM:</p> <ul style="list-style-type: none"> 1x outreach at 7 days 1x outreach at 30 days 1x outreach at 60 days <p>First year:</p> <ul style="list-style-type: none"> Quarterly outreach <p>2nd year + beyond:</p> <ul style="list-style-type: none"> Biannual or annual outreach 	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> ONLY if client moves while in program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake</p> <p>Update quarterly or if income changes</p> <p>If Primary Program ONLY</p>	<p>FAM/EMPath</p> <ul style="list-style-type: none"> At intake Update quarterly <p>If Primary Program ONLY</p>	N/A	Childcare Tracker for each placement
CCC <i>(Case Management Only)</i>	<p>1x/month engagement for 60 minutes total</p>	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> ONLY if client moves while in program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>FAM/EMPath</p> <ul style="list-style-type: none"> At intake Update quarterly 	<p>At intake</p> <p>Update quarterly or when goals are completed</p>	Childcare Tracker for each child enrolled
C-Work	<p>ECE: TBD</p> <p>Workforce Dev: TBD</p>	<p>Intake</p> <ul style="list-style-type: none"> Living situation when entering program <p>Enrolled</p> <ul style="list-style-type: none"> ONLY if client moves while in program <p>Program Exit</p> <ul style="list-style-type: none"> Living situation at exit 	<p>At intake</p> <p>Update quarterly or if income changes</p>	<p>Job Readiness Assessment</p> <ul style="list-style-type: none"> At intake Quarterly 	<p>Individual Employment Plan (IEP)</p> <ul style="list-style-type: none"> At intake Quarterly <i>or when goals completed</i> 	<p>Employment Tracker at intake and for each employment placement</p> <p>Education Tracker – for each ECE class and internship, and any other training/education placements</p>

WELLBEING PROGRAMS

PROGRAM	CONTACT FREQUENCY & DOSAGE	HOUSING TRACKER	INCOME TRACKER	ASSESSMENT	GOALS <i>Planned for FY26</i>	OTHER OUTCOMES
CBHS	2x/month therapy sessions for 100 minutes total	Intake <ul style="list-style-type: none"> Living situation when entering program Enrolled <ul style="list-style-type: none"> ONLY if client moves while in program Program Exit <ul style="list-style-type: none"> Living situation at exit 	N/A	WHOQOL <ul style="list-style-type: none"> After 3rd session Every 12 sessions (approx. quarterly) Therapy Impact Scale <ul style="list-style-type: none"> After 3rd session Every 12 sessions (approx. quarterly) 	Therapeutic Treatment Plan <ul style="list-style-type: none"> At intake Every 12 sessions (approx. quarterly) 	N/A

The goal of Performance Management is to find out if what we are doing works. We ask ourselves: Are the consistent set of services we provide producing the desired outcomes?

KEY DEFINITIONS

- **Performance Management:**
 - In general the term refers to an ongoing process of communication between a supervisor and an employee in support of accomplishing the strategic objectives of the organization
 - In this context it is about ensuring that accurate client information is entered into the database in a timely fashion so we can learn from our work with families and keep improving our practice
- **Primary Program**
 - The program that is the primary contact for the client. The case manager in the primary program is responsible for completing the Quarterly Assessment and liasoning with other Compass staff who work with the client.
- **Staff Outreach**
 - When a Compass staff person reaches out to a client—even if the client doesn't respond.
- **Client Engagement**
 - When a client engages with a Compass staff person.
- **Frequency**
 - This term is used in performance management to clarify **how often** Compass staff are expected to reach out to clients on their caseload. Some programs require a certain frequency of staff outreach, while others require a certain frequency of client engagement, or both.
- **Dosage**
 - This term is used in performance management to clarify the **amount of time** Compass staff is expected to engage with families. The full dosage does not need to be completed during a single engagement with the client, and can be fulfilled over multiple engagements within the applicable time period (e.g. frequency is weekly, monthly, etc.)
- **Income Trackers**
 - Used to collect information on earned income and benefits (e.g. food stamps and debt)
 - If there has been no change in income, a case manager can clone the most recent Income Tracker for convenience.
 - To learn how to track income see [here](#)
- **Housing Trackers**
 - Used to track client's housing information at different points in time
 - To learn how to track housing see [here](#).

- **Assessments**
 - Used to track client outcomes across several different categories. Assessments vary based on the program.
 - To learn how to track use a FAM see [here](#)

- **Goals**
 - Used to track progress on client goals
 - To learn how to track goals see [here](#)

- **Follow Up Calls**
 - Used to see if a family is still housed after successfully exiting a Compass housing program
 - To learn how to make follow up calls see [here](#).