



Self-Sufficiency Matrix

Based on Abt Associates Training PP



Michigan Statewide HMIS

Staff Training

Why Use the Matrix



- Case Workers like it.
- As a basis for the Client Centered Plan. It supports a dialogue about where you are, where you want to be, and how you are going to get there.
- Holistic and provides structure for what would otherwise be an intrusive and long interview. Can be done reliably by staff with less extensive training
- Categories are developmental on 5-point scale. Measures smaller increments of improvement.
- Instrument is designed for use with the client – pretty understandable.

Uses of the Data Beyond Case Plan:

- The Report provides a detailed picture of the clients you serve. This data can be used to:
 - Educate the community and your staff.
 - Develop a better understanding of un-met needs.
 - Write grants.
 - Determine the frequency / intensity of case management.

How Clients are Changing



- The Report provides a picture of how clients are changing across all 18 domains.
 - Can monitor CoC and Program effectiveness.
 - Can report on nearly any Grant you write without proliferating measures.
 - As a clinical tool with clients. Client see a visual picture of their progress.
 - Supporting staff supervision. Versions of our reports can be run by staff.

Other Benefits



- Data entry only takes about 30 seconds.
- As a management tool - allows management to prioritize domains and communicate those areas to staff and clients.
- Can modify to make it your own.
Michigan did some modifications to support improved reliability and to gain ownership from users.

Project Overview



- The Arizona Homeless Evaluation project involves the use of a Self Sufficiency Matrix that has been tested for validity and reliability
- Designed for adults. For Grant Programs one matrix per household is required, however if you actively working with 2 or more adults – it makes sense to do all adults as progress may vary between adults.
- Michigan's Youth Pilot Group has been using it for Youth 16+ when the plan is for emancipation. We developed a Re-unification Matrix for youth returning home.
- Data is analyzed

Arizona Self-Sufficiency Matrix

Two Key Features:

- 18 domains in the Self-Sufficiency Matrix
- Client's status on each domain is measured by a 5-point scale

Works best if accompanied with routine supervision!!!

Domain	Scale
1. Income	1 = In Crisis
2. Employment	
3. Housing	
4. Food	2 = Vulnerable
5. Childcare	
6. Children's Education	
7. Adult Education	3 = Safe
8. Legal	
9. Health Care	
10. Life Skills	4 = Building Capacity
11. Mental Health	
12. Substance Abuse	
13. Family Relations	5 = Empowered
14. Mobility	
15. Community Involvement	
16. Safety	Red Domains – Michigan Adapted
17. Parenting Skills	
18. Credit (Optional)	

Using the Matrix



18 Domains of Participant Self-Sufficiency

- *When Data Is Collected:* Upon any program entry and at program exit. Transitional housing programs must also collect the information every **3 months** after entry. Permanent housing programs must collect the data set every **6 months** after entry. **3 months is recommended to support integration with the Care Plan & to ensure an Exit Rating.**
- *Subjects:* All persons over the age of 16

Using the Matrix



- *Filling out the matrix:*

- It is recommended that the Matrix be **done jointly by the client and case manager**. The matrix is an *excellent* engagement tool for family-centered practice. If the client leaves without a closing session, the case manager may complete the final matrix based on their knowledge of the client. The CM should skip areas where they have no current knowledge.
- Select one and only one status level in each of the domains.
- If you and the client feel that the best score is somewhere between two numbers, score using the lower number.
- If within the initial month, you discover that an initial rating was wrong, please correct the rating. Be sure to delete in “History” the initial rating.

Using the Matrix – Brief Services

- For brief programs or very brief engagements (where interventions are limited in scope), the use of the Matrix may be limited to the initial assessment and outcomes on specific interventions.
 - For brief services where the client was not there long enough to engage with case management, the program may elect to not complete an exit rating or only rate the area targeted during the brief intervention.
 - If you are doing brief interventions and a partial Matrix, be sure to include those domains your intervention is targeting.
 - **For HARAs and Shelters:**
 - The client is sheltered very briefly while they are evaluated for a housing voucher. While there, the only activity the client completes is an initial assessment. Case Management does not have time to engage. The household receives a rental voucher.
 1. The Initial Ratings are used to better describe the clients that are coming for help.
 2. The post rating is restricted the “Housing” domain as no other intervention was completed.

Using the Matrix – Brief Services

- For Outreach:

1. If limited domains are used, be sure to include those that might change with your intervention (e.g. housing, transportation, community engagement or health measures).
2. The Outreach Worker completes an “exit rating” **only** for those clients where 2 or more contacts occur.
3. On the SS Matrix Report
 - The follow-up count becomes a measure of those with follow-up, and
 - The changes scores reflect the progress consumers have made with where a follow-up was successful.

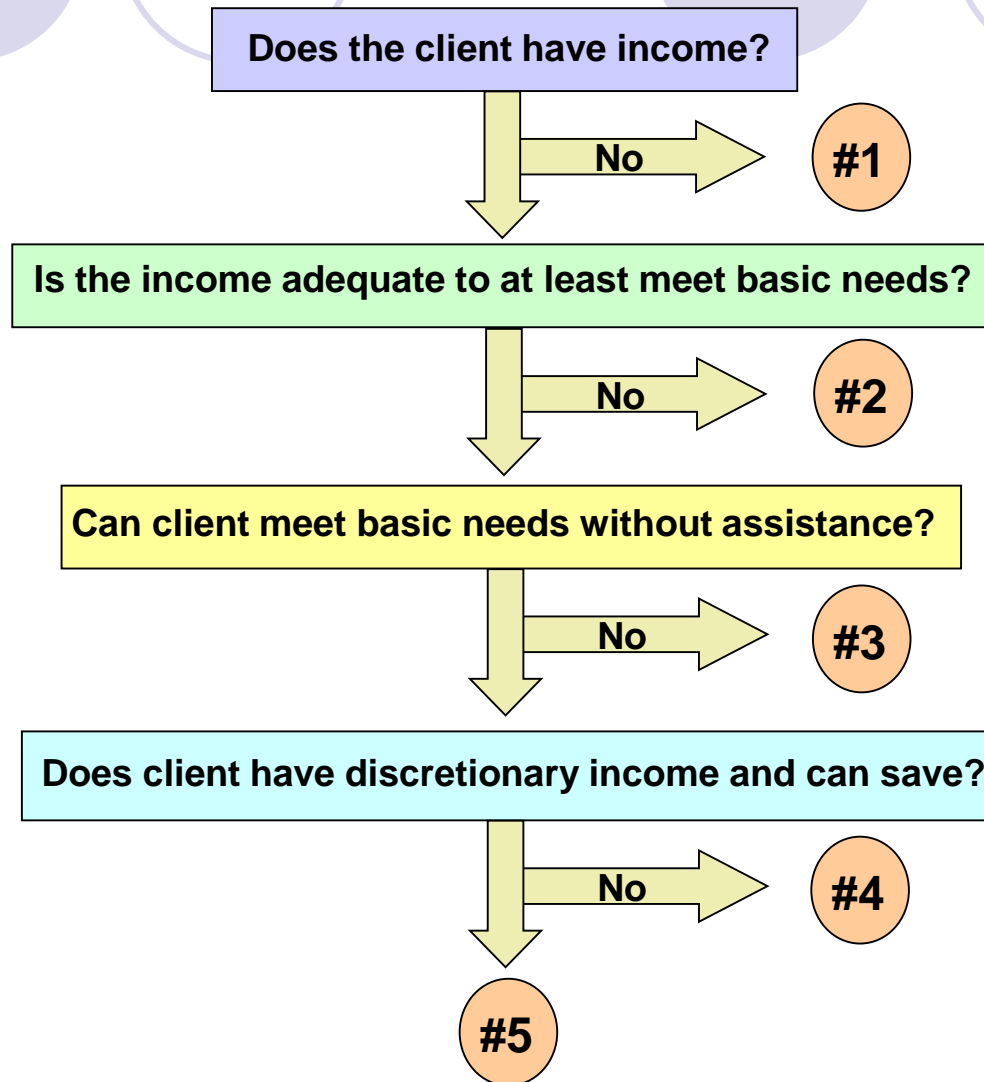
The strategy for brief services may only be considered for short interventions and should not reflect clients with longer stays that fail to engage with services.

Self-Determination and Skills - Income

1. Income

- 1. No Income
- 2. Inadequate income and/or spontaneous or inappropriate spending.
- 3. Can meet basic needs with subsidy; appropriate spending. (If the client is receiving income supports like SSI, but still lacks enough income to meet all basic expenses use a 3 rating)
- 4. Can meet basic needs and manage debt without assistance. (If the client is receiving income supports like SSI, and is able to balance their budget use 4)
- 5. Income is sufficient, well managed; has discretionary income and is able to save.

Self-Determination and Skills - Income

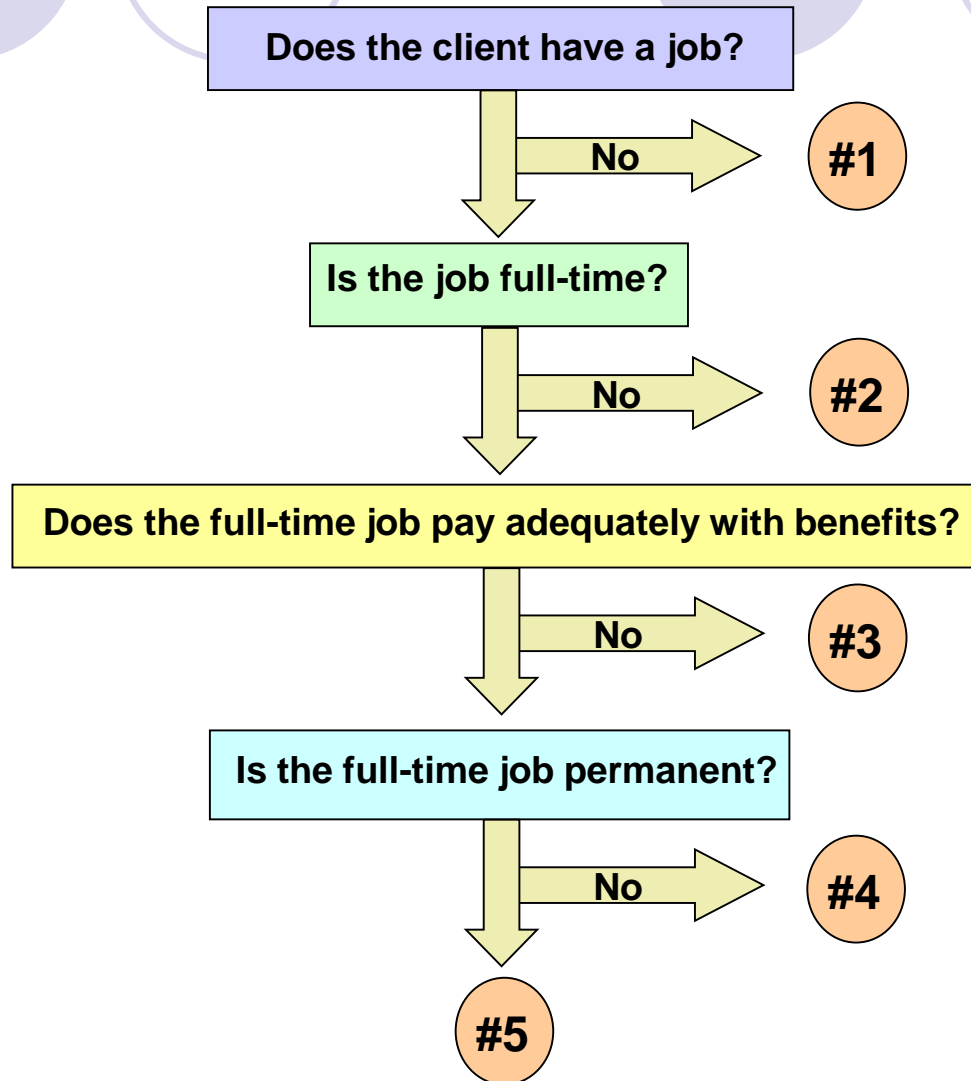


Self-Determination and Skills - Employment

2. Employment (Skip if the client is not employable).

- 1. No Job
- 2. Temporary, part-time or seasonal; inadequate pay; no benefits
- 3. Employed full-time; inadequate pay; few or no benefits
- 4. Employed full-time with adequate pay and benefits
- 5. Maintains permanent employment with adequate income and benefits

Self-Determination and Skills - Employment



Self-Determination and Skills - Housing

3. Affordability and Safety

- 1. Homeless or threatened with eviction
- 2. In transitional, temporary or substandard housing; and/or current rent/mortgage payment is unaffordable
- 3. In stable housing that is safe but only marginally adequate. – 30% of income. This allow for consideration of other factors such as neighborhood etc.
- 4. Household is safe, adequate, subsidized housing, shared housing solution.
- 5. Household is safe, affordable w/o assistance, adequate, unsubsidized housing

Self-Determination and Skills - Housing

Is the client housed and not at imminent risk of losing that housing?

No

#1

Is the housing stable and/or affordable?

No

#2

Is the housing adequate?

No

#3

Is affordable housing unsubsidized?

No

#4

#5

Self-Determination and Skills - Food

4. Food- food stamps as asset for poor HH.

- 1. No food or means to prepare it. Relies to a significant degree on other sources of free or low-cost
- 2. Food/facilities are available but inadequate to meet all nutritional needs or may be temporary (e.g. shelter).
- 3. Can meet basic food needs but requires occasional assistance. May be on food stamps
- 4. Can meet basic food needs without assistance
- 5. Can choose to purchase any food household desires

Self-Determination and Skills - Food

Does the client have food and means to prepare it?

No

#1

Can the client meet basic food needs may be on food stamps/food banks?

No

#2

Can the client meet basic food needs without any assistance?

No

#3

Can client satisfy any food need?

No

#4

#5

Self-Determination and Skills - Childcare

5. Childcare – Skip if no children.

- 1. Needs childcare, but none is available/accessible and/or child is not eligible
- 2. Childcare is unreliable or unaffordable; inadequate supervision is a problem for childcare that is available
- 3. Affordable subsidized childcare is available but limited
- 4. Reliable, affordable childcare is available; no need for subsidies
- 5. Able to select quality childcare of choice

Skip if no age appropriate children

Self-Determination and Skills - Childcare

Does the client have access to some form of child care?

No

#1

Does the client have access to reliable or affordable child care?

No

#2

Is the child care unsubsidized?

No

#3

Can client select any type of child care?

No

#4

#5

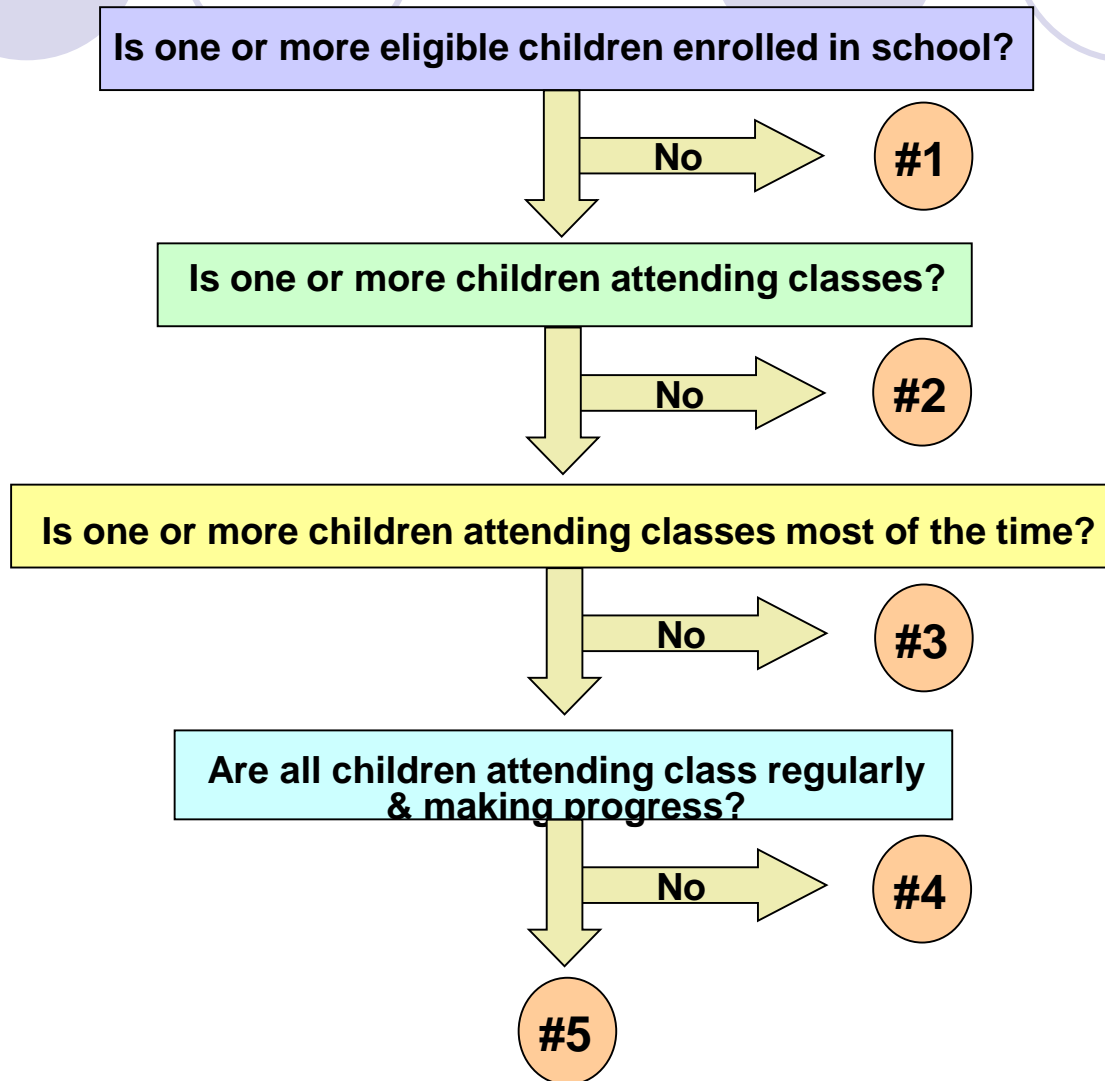
Self-Determination and Skills – Children’s Education

6. Children’s Education (High School or less.)

- 1. One or more eligible children not enrolled in school
- 2. One or more eligible children enrolled in school but not attending classes
- 3. Enrolled in school, but one or more children only occasionally attending classes
- 4. Enrolled in school and attending classes most of the time
- 5. All eligible children enrolled and attending on a regular basis and making progress.

Skip if no school age children

Self-Determination and Skills – Children’s Education

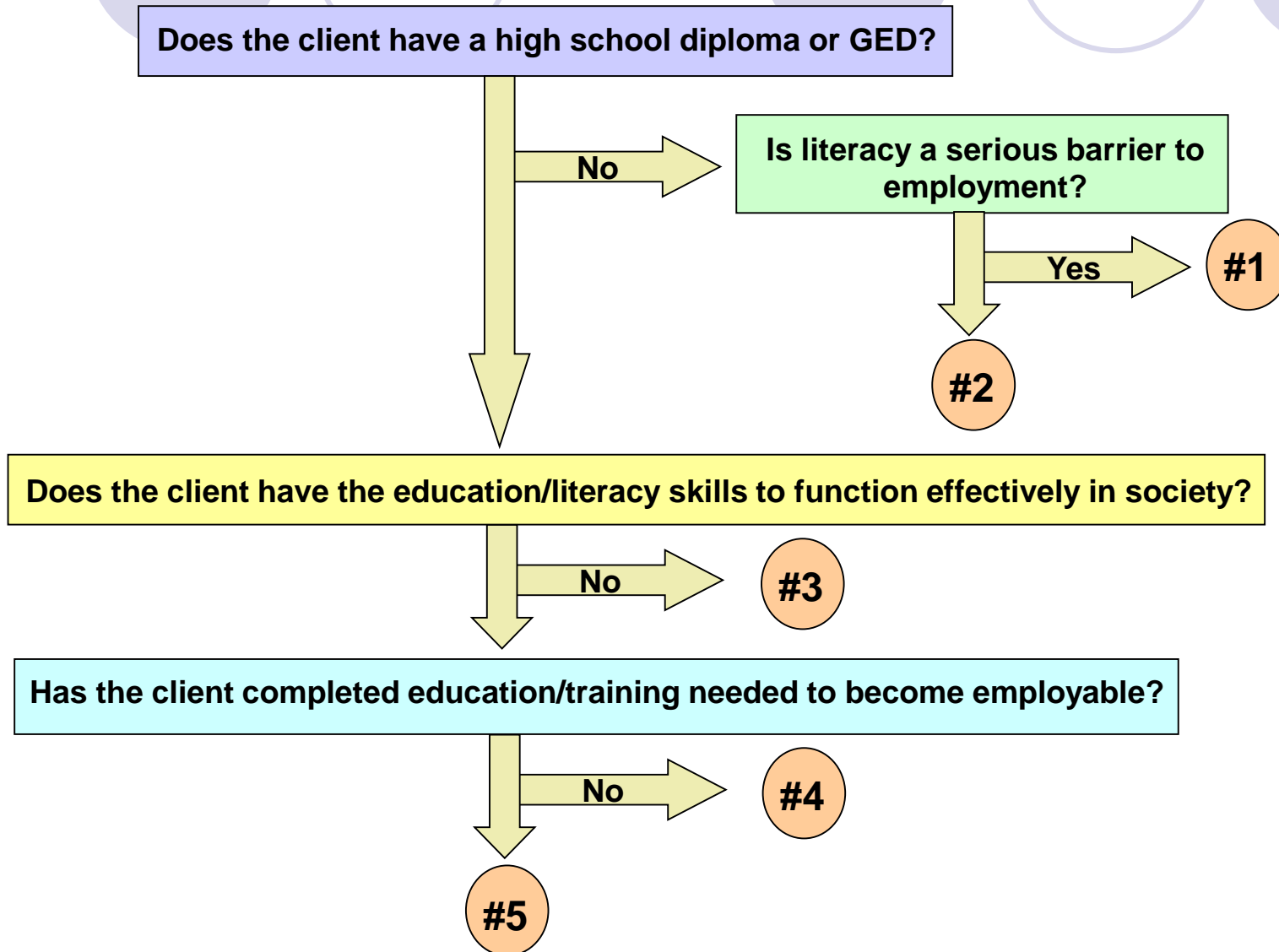


Self-Determination and Skills – Adult Education

7. Adult Education / Literacy– Youth if emancipating.

- 1. Literacy problems and/or no high school diploma/GED are serious barriers to employment
- 2. Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment
- 3. Has high school diploma/GED
- 4. Needs additional education/training to improve employment situation and/or to resolve literacy problems to where they are able to function effectively in society
- 5. Has completed education/training needed to become employable. No literacy problems

Self-Determination and Skills – Adult Education

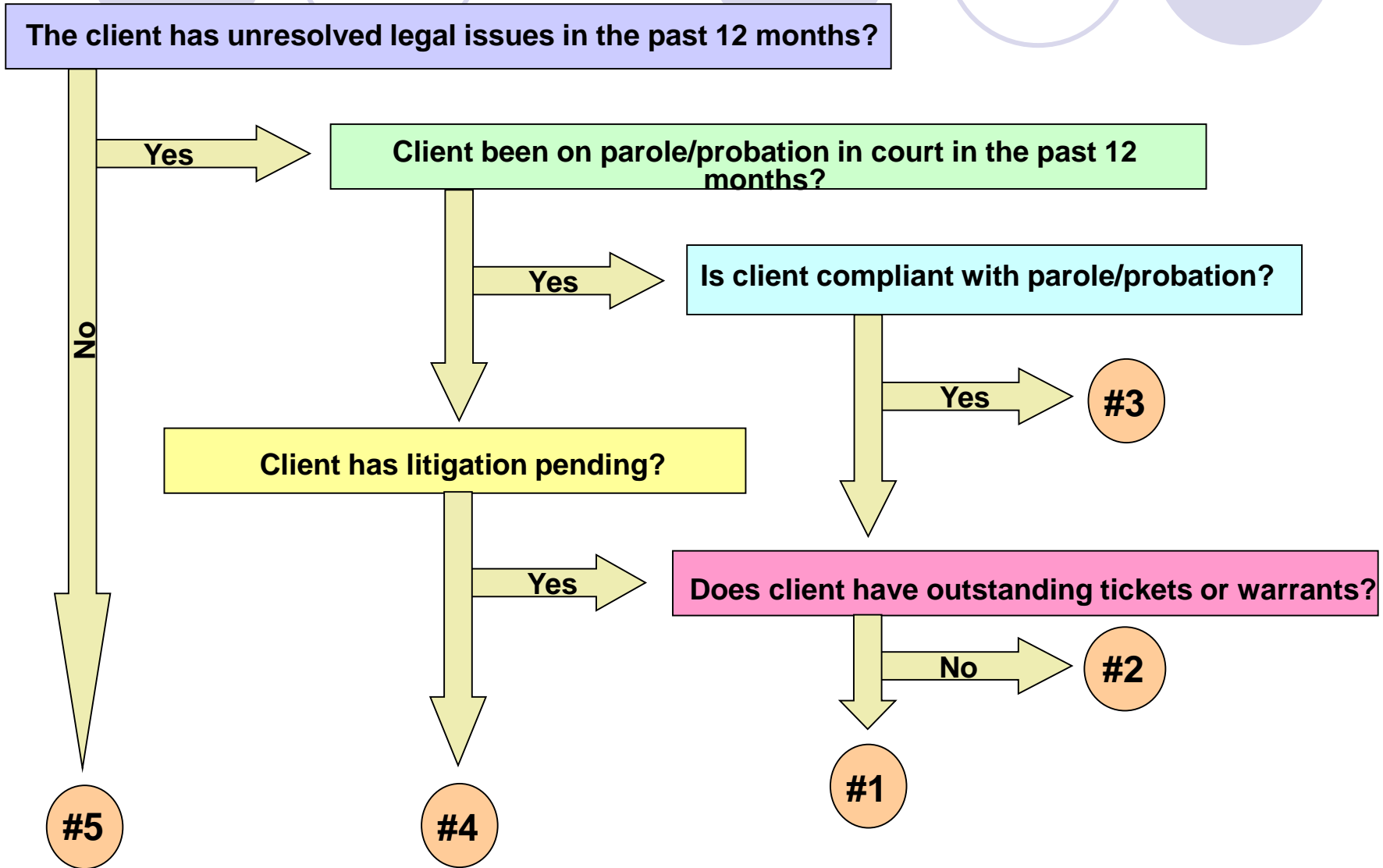


Self-Determination and Skills – Legal

8. Legal

- 1. Current outstanding tickets or warrants or other serious unresolved legal issues.
- 2. Current charges/trial pending; noncompliance with probation /parole / legal issues impacting housing qualifications.
- 3. Fully compliant with probation/parole terms/ past non-violent felony convictions/ working on plan to resolve other legal issues.
- 4. Has successfully completed probation/parole within past 12 months; no new charges filed; recently resolved other legal issues.
- 5. No active legal issues in more than 12 months and/or no felony/significant legal/criminal history.

Decision Tree for Criminal Charges



List Identified Legal Issues

Please list types of legal issues impacting client.

Circle specific issues that impact housing.

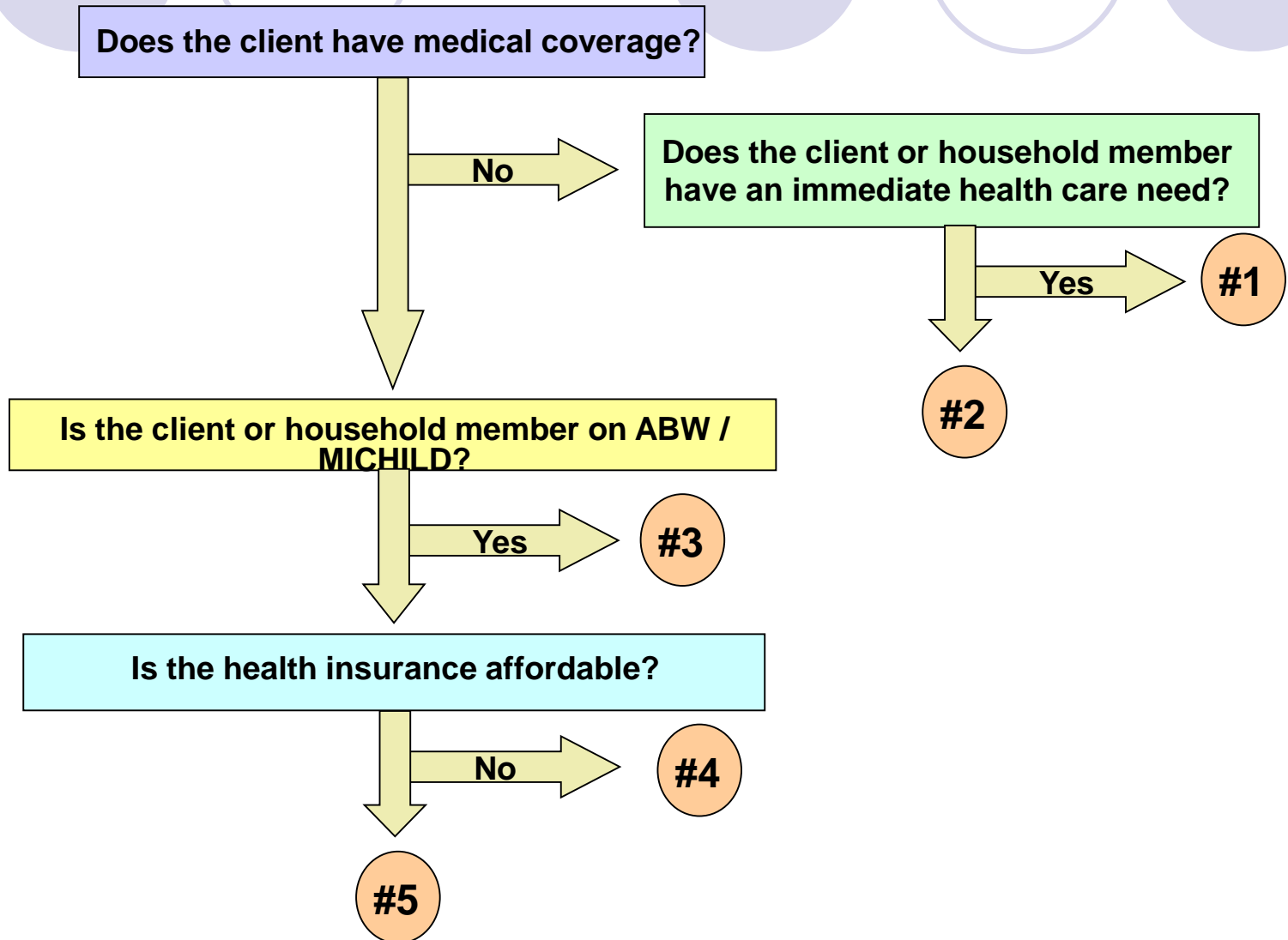
- Civil Judgments
- Bankruptcy
- Family Law Divorce/Custody/Child Support
- Sex Offender Status
- Drug Charges
- Violent Crimes

Self-Determination and Skills – Health Care

9. Health Care

- 1. No medical coverage with immediate need
- 2. No medical coverage and great difficulty accessing medical care when needed. Some household members may be in poor health
- 3. Some members (e.g. children) on MiChild, but adults lack coverage.
- 4. All members can get medical care when needed but may strain budget
- 5. All members are covered by affordable, adequate health insurance

Self-Determination and Skills – Health Care



Self-Determination and Skills – Life Skills

10. Life Skills (based on case manager assessment of individual rating, the overall impact, or the pattern of rating).

- 1. Unable to meet basic needs such as hygiene, food, activities of daily living
- 2. Can meet a few but not all needs of daily living without assistance
- 3. Can meet most but not all daily living needs without assistance
- 4. Able to meet all basic needs of daily living without assistance
- 5. Able to provide beyond basic needs of daily living for self and family



Life Skill Areas :

- Hygiene
- Food Preparation
- Time Management
- High Risk Behaviors
- Money Management
- Basic Communication including responses to authority
- Anger Management



1 = In Crisis

2 = Vulnerable

3 = Safe

4 = Building Capacity

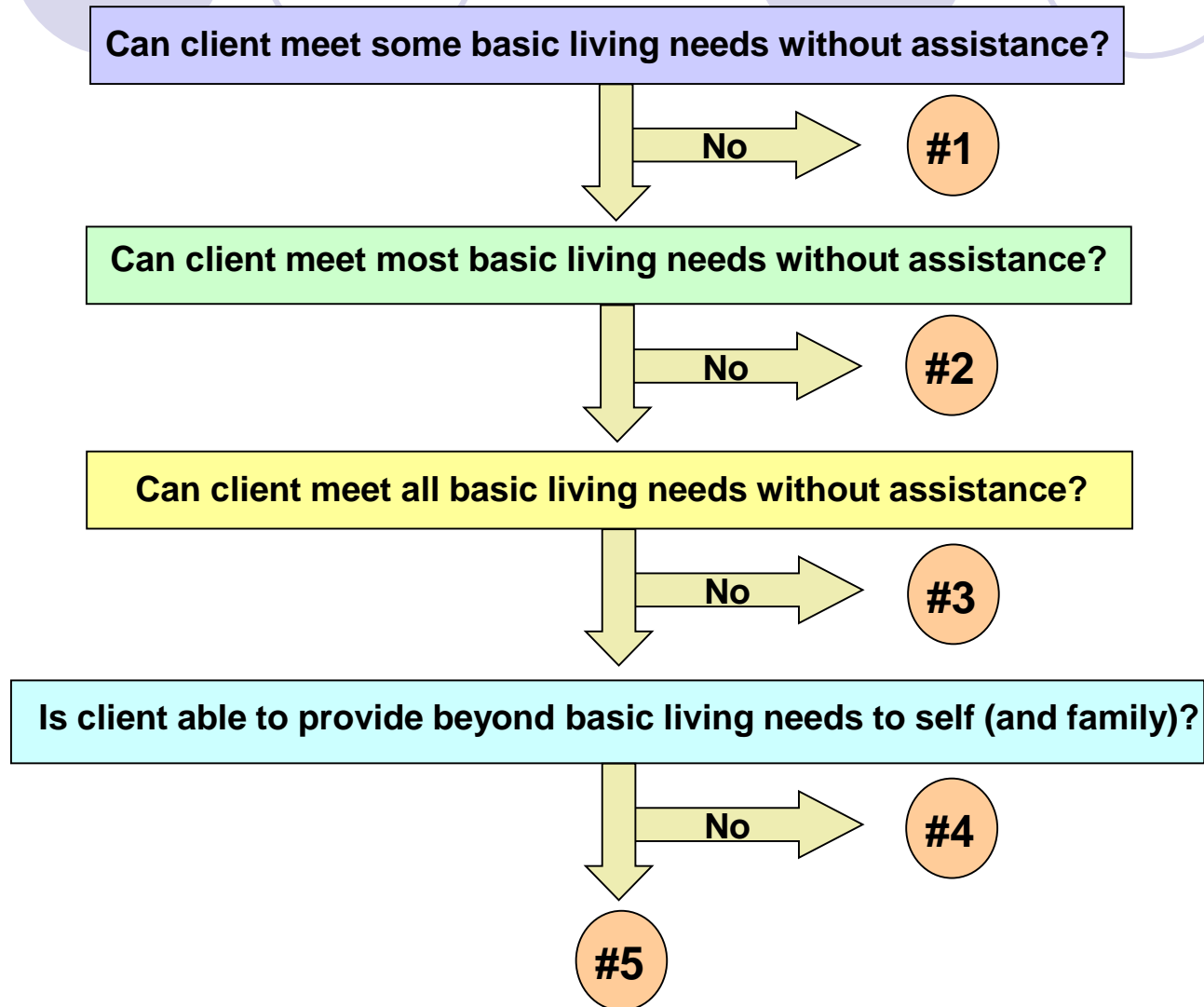
5 = Empowered

For Example

- A husband does not know how to cook but is married and the roles delegate cooking to the wife. Even though he may earn a 1, this is not a crisis situation overall. All other ratings reflect good knowledge. The case manager decides that the overall rating is a “4”, with a need for him improve in this area.
- A client has good ratings in all areas but money management. However, the degree of crisis generated from that single issue has resulted in homelessness. The client is anxious to improve and most issues can be addressed with training. The case manager wishes to recognize this significant deficit and gives a “3” rating.

- The client has moderate (3 to 4) ability/knowledge in most life skills areas with the exception of communication where he is rated as a “1.” This impacts most areas of his life. His overall rating is a “2”, even though his most frequent rating is a “3.”
- The young adult has had very little training in all 7 of the life skill areas. His individual domain scores range from a “2” to a “3.” The case manager selects the most frequent rating of “3” as no one area has created a crisis in functioning.
- The client has good skills in most areas receiving a most frequent rating of 4. However, they persist in behaviors that involve significant risk and they refuse to really engage. The case manager gives them a “1” on “Risky Behavior” and a “1” overall as those behaviors are life threatening.

Self-Determination and Skills – Life Skills

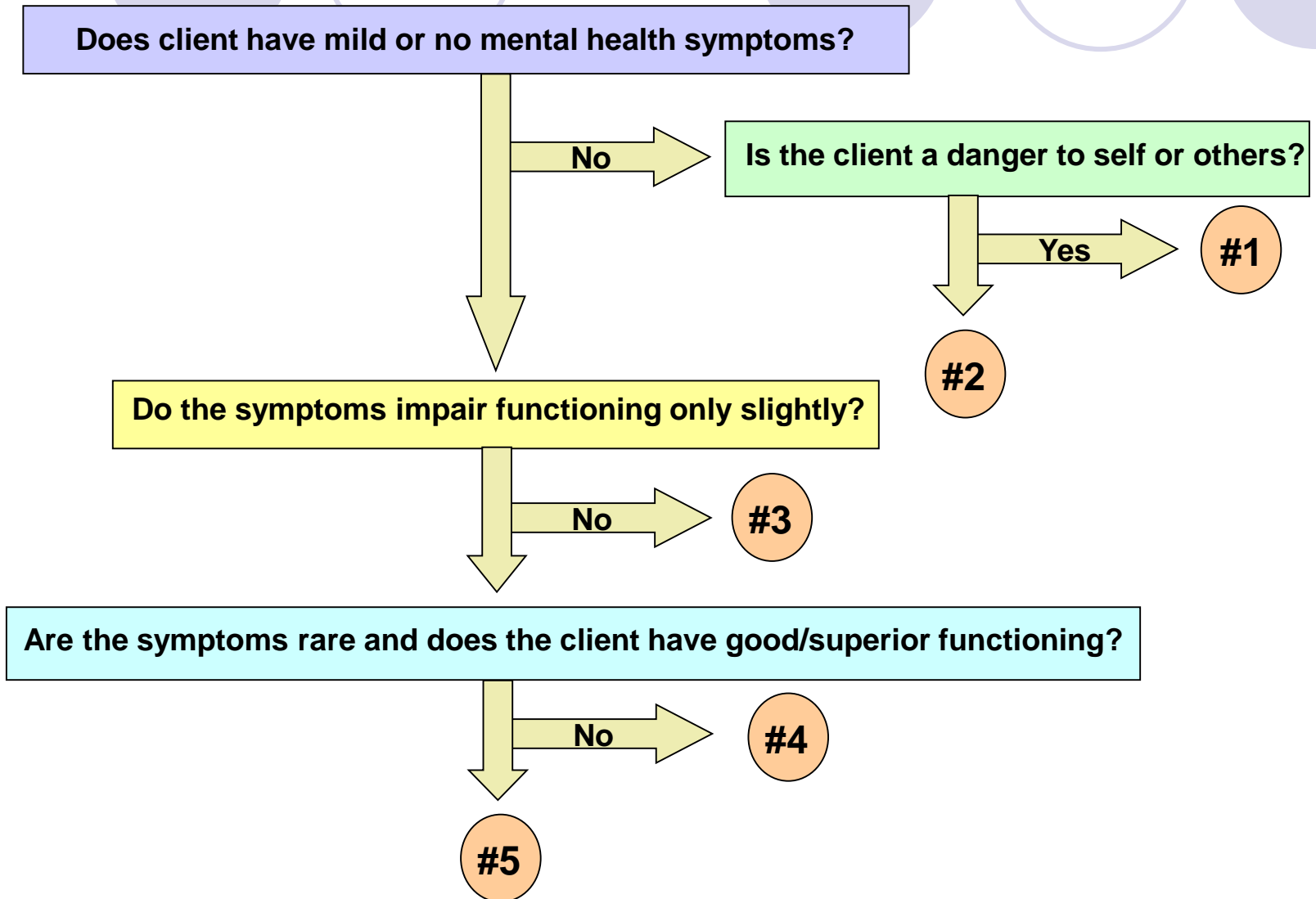


Self-Determination and Skills – Mental Health

11. Mental Health

- 1. Danger to self or others; recurring suicidal ideation; experiencing severe difficulty in day-to-day life due to psychological problems
- 2. Recurrent mental health symptoms that may affect behavior but not a danger to self/others; persistent problems with functioning due to mental health symptoms
- 3. Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems
- 4. Minimal symptoms that are expectable responses to life stressors; only slight impairment in functioning
- 5. Symptoms are absent or rare; good or superior functioning in wide range of activities; no more than every day problems or concerns

Self-Determination and Skills – Mental Health

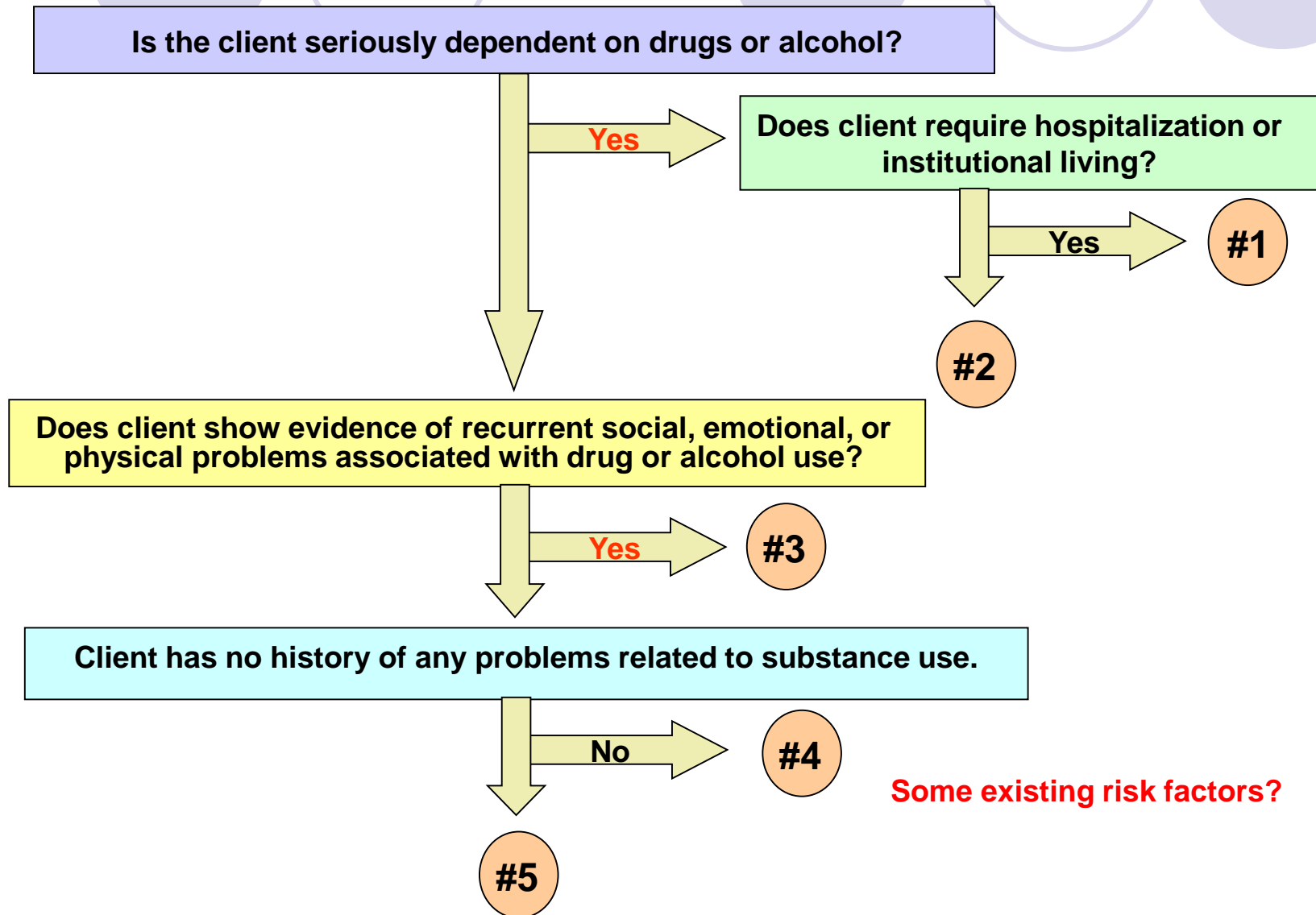


Self-Determination and Skills – Substance Abuse

12. Substance Abuse- May need to update initial rating.

- 1. Meets criteria for severe abuse/dependence; resulting problems so severe that institutional living or hospitalization may be necessary
- 2. Meets criteria for dependence; preoccupation with use and/or obtaining drugs/alcohol; withdrawal or withdrawal avoidance behaviors evident; use results in avoidance or neglect of essential life activities
- 3. Use within last 6 months; evidence of persistent or recurrent social, occupational, emotional or physical problems related to use (such as disruptive behavior or housing problems); problems that have persisted for at least one month
- 4. Client has history of substance abuse but has not used for at least 6 months - OR - client has some use with no obvious ill effects but retains some risk factors (e.g. legal, age, family history).
- 5. No current/historical evidence of problems in any domain of life related to substance use.

Self-Determination and Skills – Substance Abuse



Self-Determination and Skills – Family/Social Relations

13. Family/Social (Social) Relations

- 1. Lack of necessary support from family or friends; abuse (DV, child) is present or there is child neglect
- 2. Family/friends may be supportive but lack ability or resources to help; family members do not relate well with one another; potential for abuse or neglect
- 3. Some support from family/friends; family members acknowledge and seek to change negative behaviors; are learning to communicate and support
- 4. Strong support from family or friends; household members support each other's efforts
- 5. Has healthy/expanding support network; household is stable and communication is consistently open

Self-Determination and Skills – Family Relations

Does client have support from family or friends?

No

#1

Do family/friends relate well and are active in changing negative behaviors?

No

#2

Does client have strong support from family/friends and do family/friends support one another?

No

#3

Is the support network expanding?

No

#4

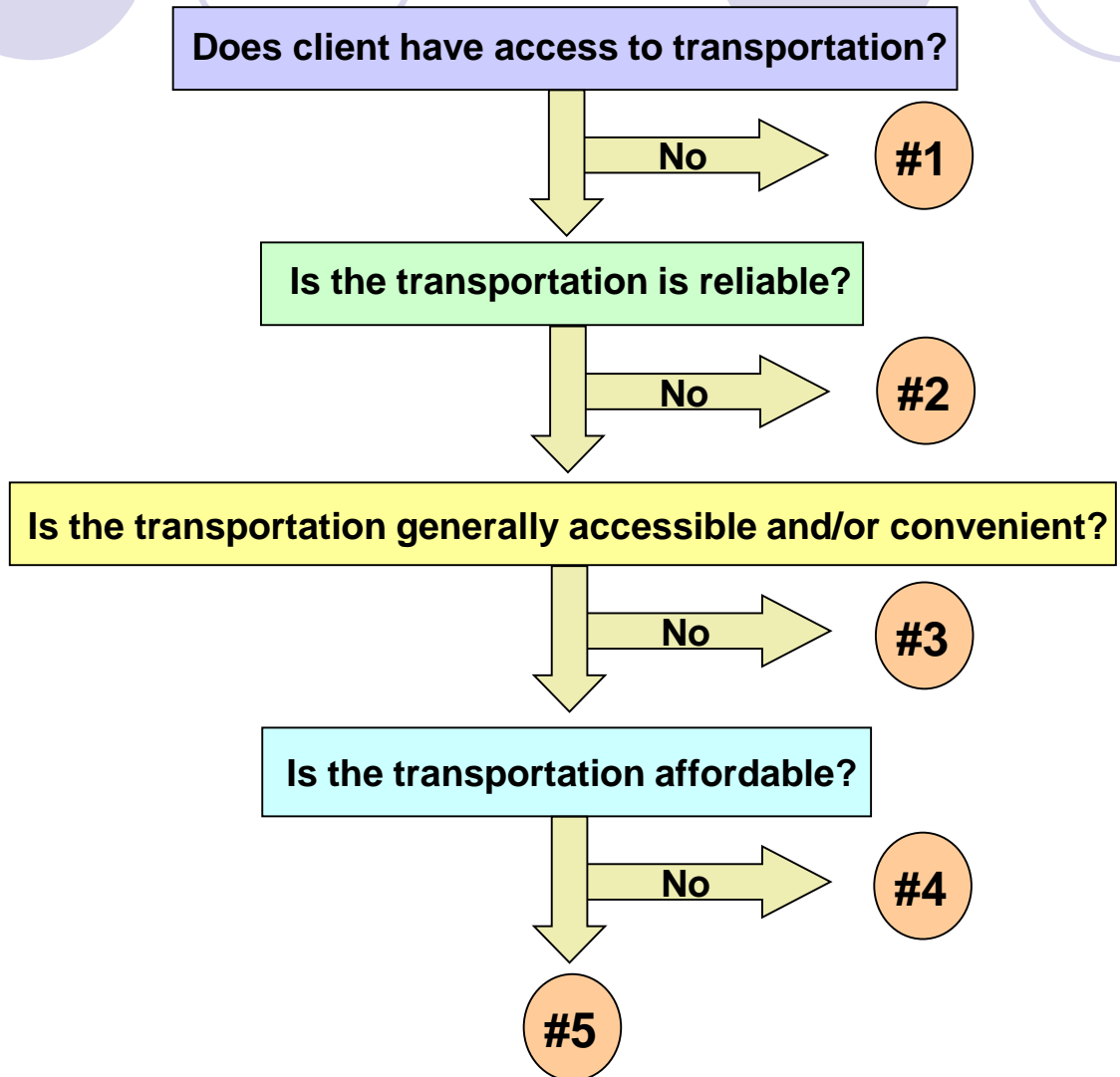
#5

Self-Determination and Skills – Transportation / Mobility

14. Transportation/Mobility

- 1. No access to transportation, public or private; may have car that is inoperable
- 2. Transportation is available (including bus) but unreliable, unpredictable, unaffordable; may have car but no insurance, license, etc
- 3. Transportation is available (including bus) and reliable but limited and/or inconvenient; drivers are licensed and minimally insured (> 1 hour bus commute)
- 4. Transportation (including bus) is generally accessible to meet basic travel needs
- 5. Transportation is readily available and affordable; car is adequately insured

Self-Determination and Skills – Transportation / Mobility

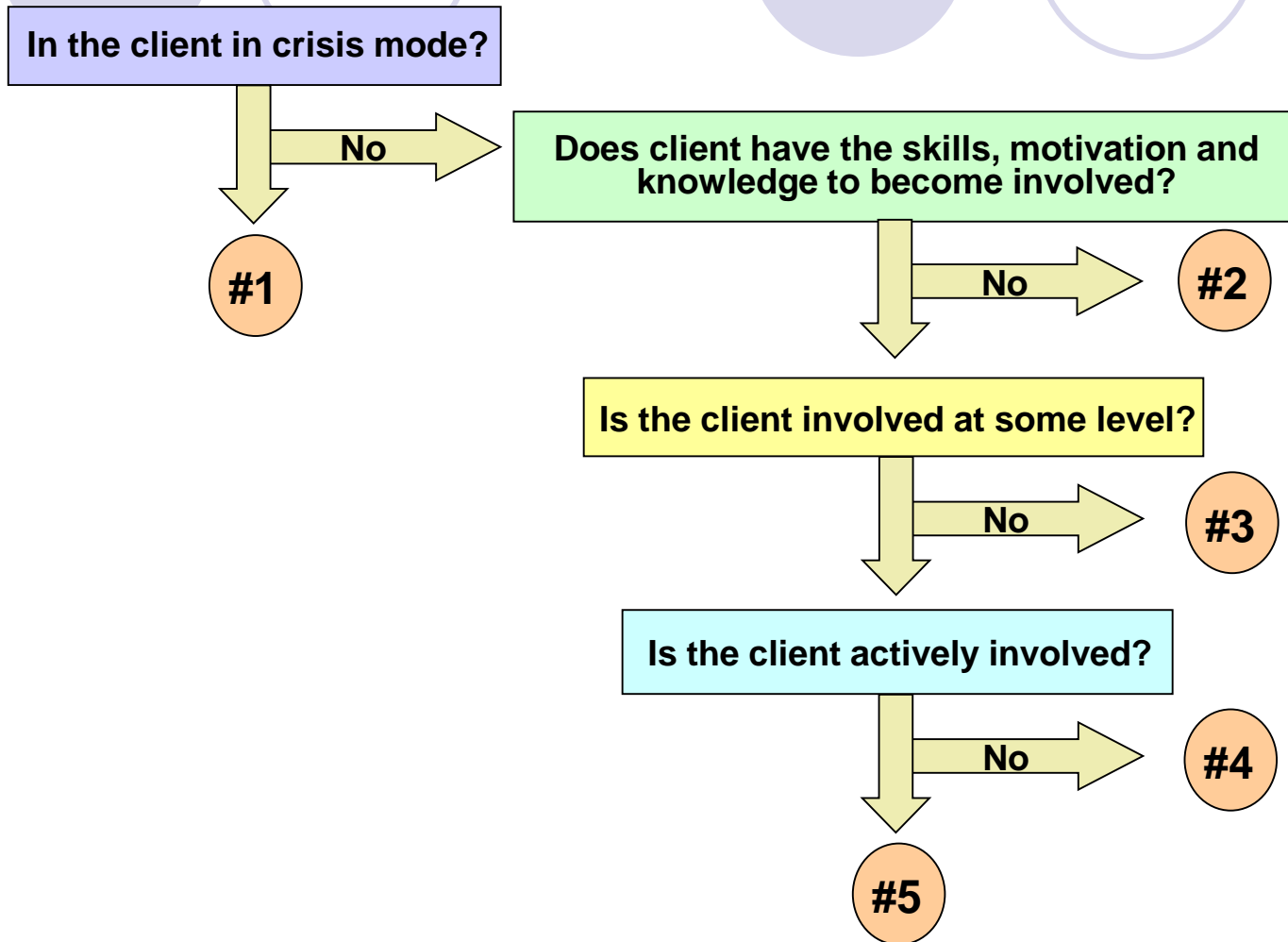


Self-Determination and Skills – Community Involvement

15. Community Involvement

- 1. Not applicable due to crisis situation; in "survival" mode
- 2. Socially isolated and/or no social skills and/or lacks motivation to become involved
- 3. Lacks knowledge of ways to become involved or new to community.
- 4. Some community involvement (church, advisory group, support group) but has barriers such as transportation, childcare issues
- 5. Actively involved in community (church, etc)

Self-Determination and Skills – Community Involvement

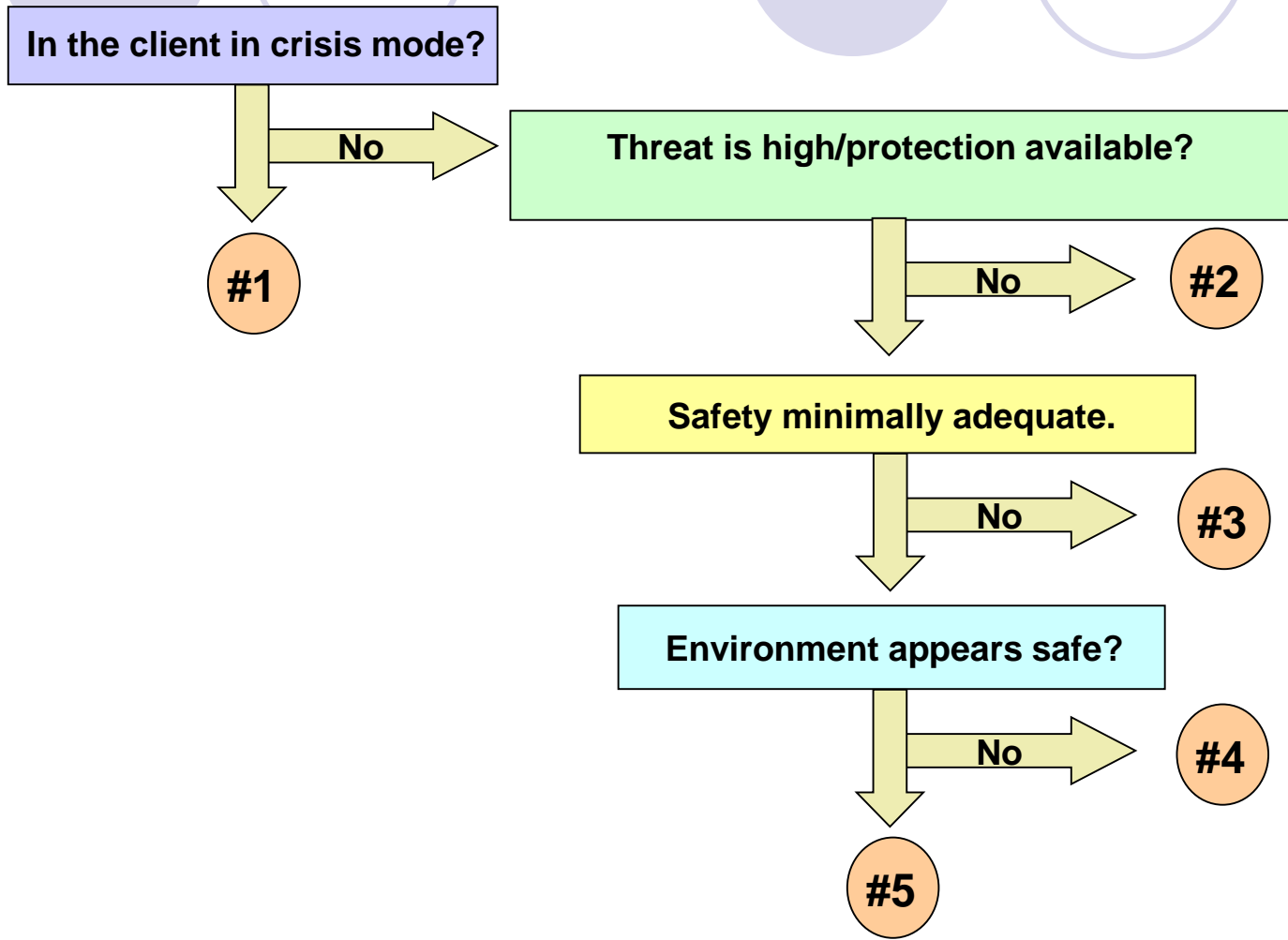


Self-Determination and Skills – Safety

16. Safety (personal and/or neighborhood safety)

- 1. Home/residence is not safe, lethality is high, possible CPS.
- 2. Safety is threatened, temporary protection is available, lethality is high.
- 3. Safety is minimally adequate, safety planning is essential
- 4. Home is safe, however future is uncertain, safety planning is important.
- 5. Home is apparently safe and stable.

Self-Determination and Skills – Safety



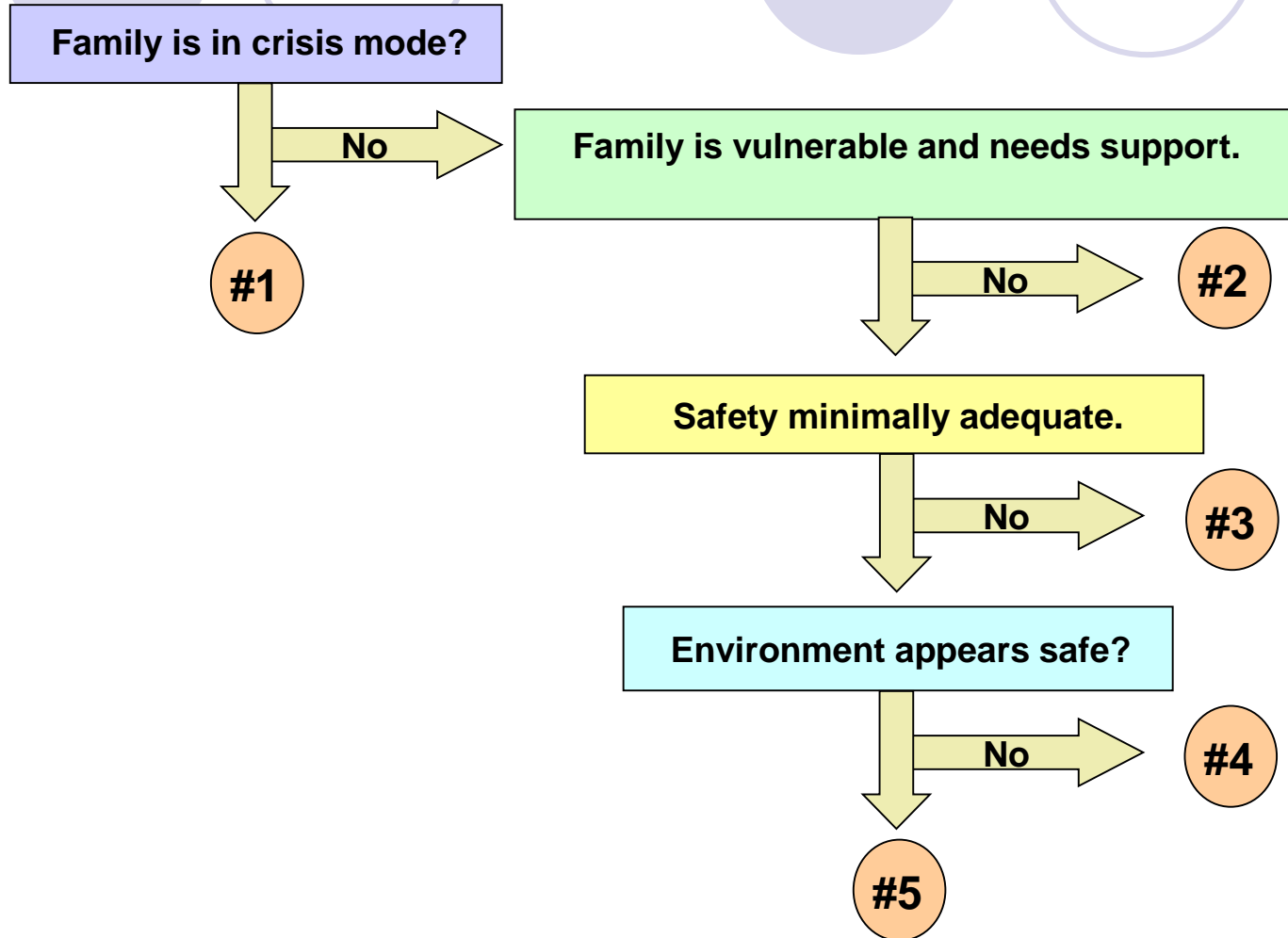
Self-Determination and Skills – Parenting Skills

16. Parenting Skills (# 1 & 2 modified for Youth)

- 1. Parenting skill are lacking and there is no extended family support.
- 2. Parenting skills are minimal and there is limited extended family support.
- 3. Parenting skills apparent but not adequate
- 4. Parenting skills are adequate
- 5. Parenting skills are well developed

If youth is parenting and living with their family, consider the skill set of the extended family.

Self-Determination and Skills – Parenting Skills





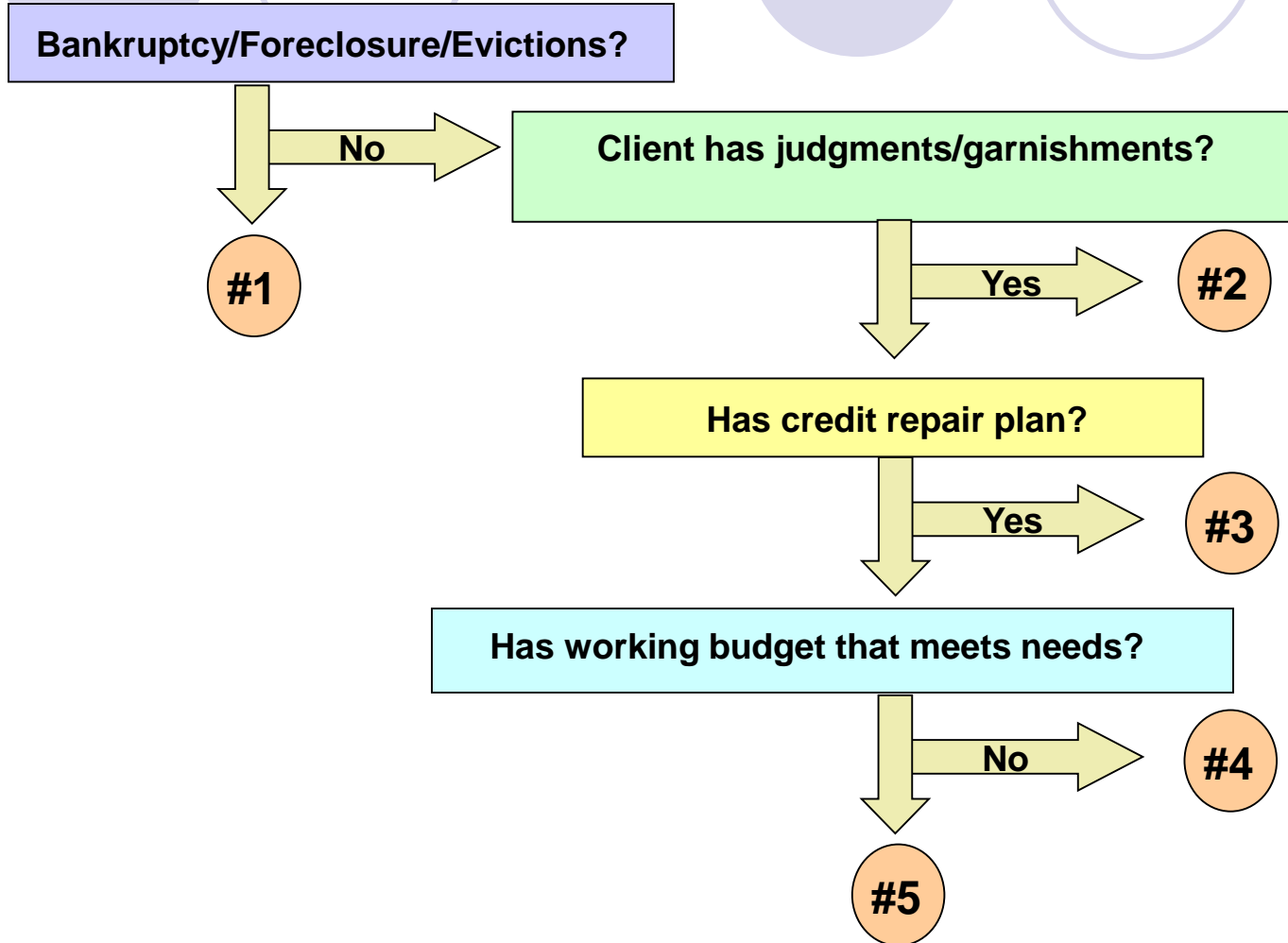
Self-Determination and Skills – Credit

1. Credit – Added to Original Matrix

- 1. Bankruptcy/Foreclosure
- 2. Outstanding judgments.
- 3. *Has a credit repair plan.*
- 4. Moderate Credit Rating.
- 5. Good Credit / Manageable Debt Ratio.

*This item is optional. Use will be determined by your program manager.

Self-Determination and Skills – Credit





Self-Determination and Skills – Disability

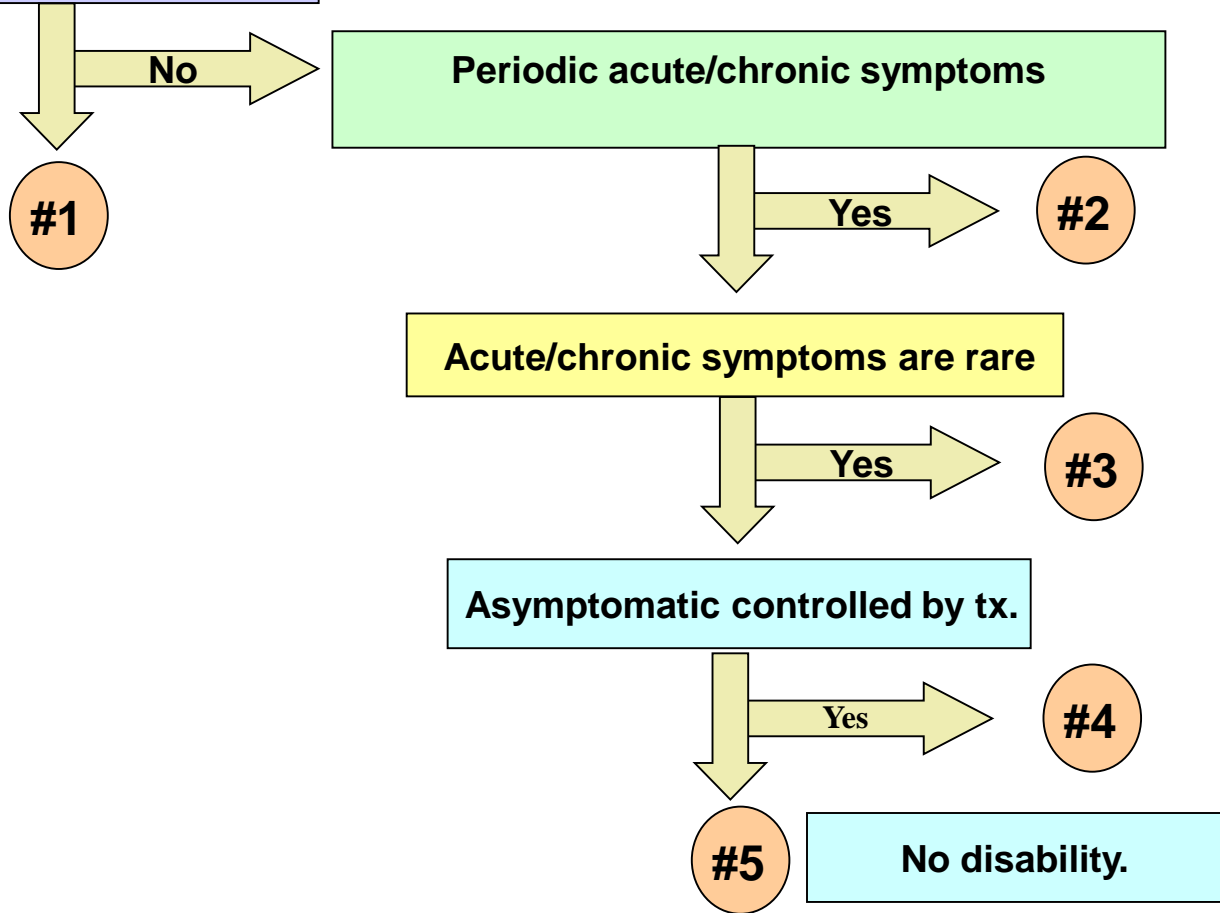
- This question was added as optional for programs who do not have enough time or the right relationship to determine the clients substance abuse or mental health disability. This could also be used if the clients has a significant “other” type of disability that they are addressing.

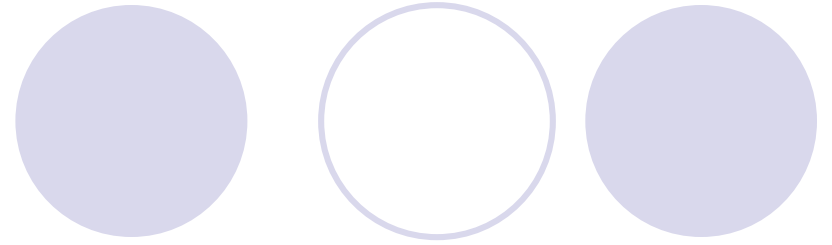
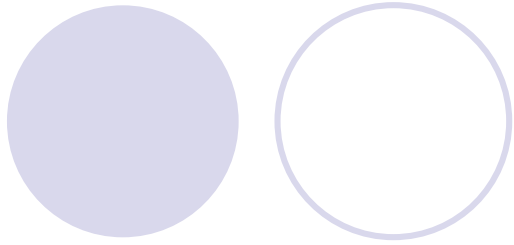
Self-Determination and Skills – Disabilities

- 1. In crisis – acute or chronic symptoms affecting housing, employment, social interactions, etc always.
- 2. Vulnerable- sometimes or periodic has acute or chronic symptoms affecting housing, employment, social interactions, etc.
- 3. Safe - rarely has acute or chronic symptoms affecting housing, employment, social interactions, etc.
- 4. Building Capacity – asymptomatic - condition may be controlled by services and/or medication.
- 5. Thriving – no identified disability.

Self-Determination and Skills – Disabilities

Acute or chronic symptoms that impact all aspects of life?





Collecting Good Quality Data

Effective Services and Data Quality

The ability of your program and CoC to address the needs of homeless persons depends largely on the quality of information collected at intake.

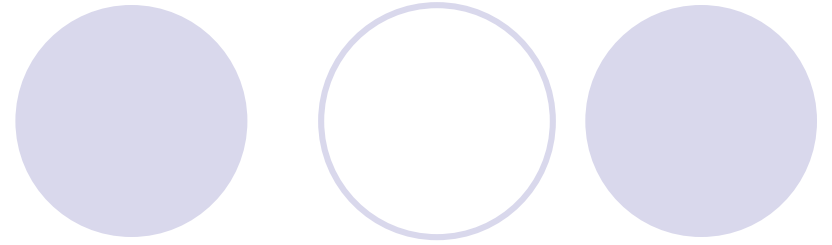


“Garbage in.....garbage out!”

Next Steps:

1. The **frequency and timing of interviews** should be determined by LOS in the Program. Too much time – lose information, too little – won't see success.
2. Determine **who** will conduct the interview with **which clients**.
3. **Enter data** into the Assessment.
4. **Run the report** designed to summarize data routinely.
5. Investigate and **correct entry** problems.
6. **Report any questions/concerns** to your manager.

Conclusion



- Questions or comments?