Single Agency and Lead Agency Intake1 Implementation

An implementation pathway from one organization’s programs to authorized participating organizations

1

HOUSEHOLD

One Household First.
Programs Second.

INTAKE1

The Problem: One Agency, Many Silos

The household experiences one life. The agency often experiences multiple files.

1 Multiple program entry points

Families enter through different grants, services, and eligibility rules.

2 Repeated intake

Staff collect the same story again and again.

3 Disconnected records

Case notes, referrals, payments, and outcomes stay separate.

4 Program success, not household progress

The agency can report activity without seeing the full household picture.

Without a shared household record, even a strong multi-program agency can unintentionally duplicate effort and miss the movement of the household as a whole.

INTAKE1

1

The Federal Layer

One household can touch eight federal agencies across eleven service categories.

A single agency inherits federal silos.

Housing, health, food, employment, childcare, disability, education, justice, child support, and veterans assistance may all reach the same household through separate statutes, grants, records, eligibility rules, and reporting requirements.

1

Inside one multi-program agency, those separate federal streams can become separate entry points, files, and definitions of success.

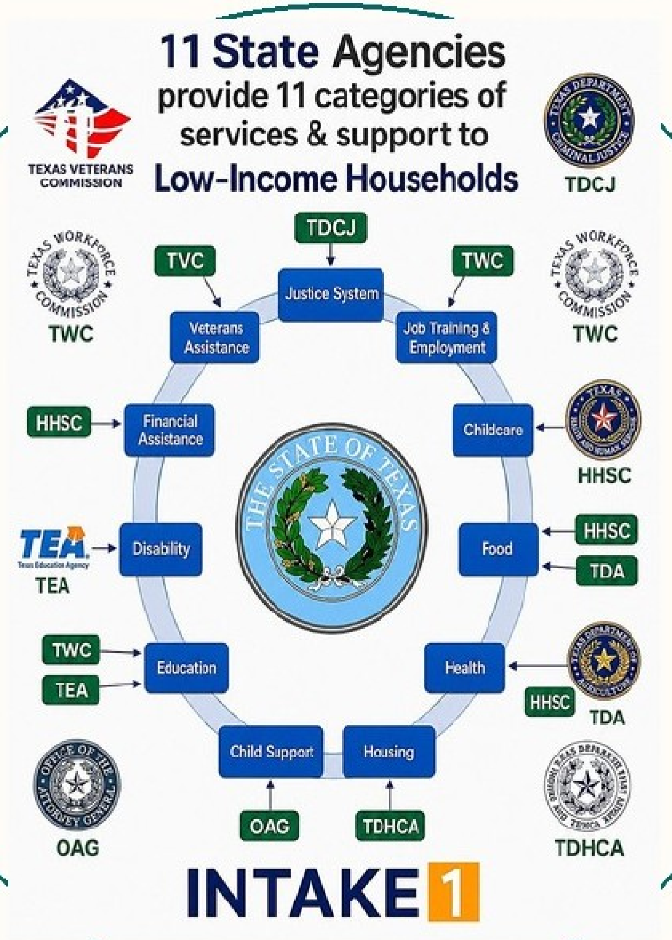
Source: The Household Experiences One Life, Chapter 18, printed page 103.

The Texas State Layer

Federal fragmentation flows downward and multiplies through state administration.

The same silos arrive as separate contracts and systems.

Texas agencies administer necessary programs through different definitions, verification requirements, recertification calendars, fund codes, performance measures, reporting rules, and data systems.



2

A single Texas organization may operate several programs correctly and still create several versions of the same household.

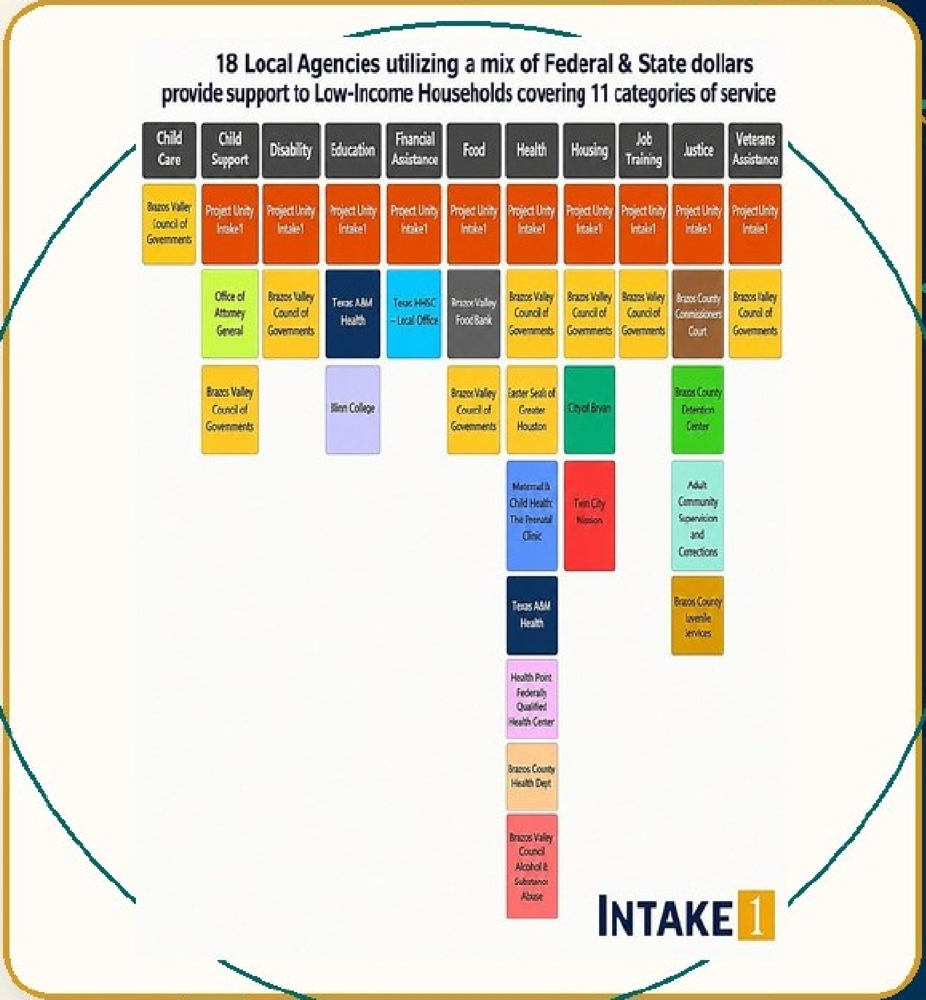
3

The Local Layer

The same household may be served by many local organizations using federal and state dollars.

Local partners add another layer of grants and systems.

Nonprofits, clinics, workforce boards, housing providers, schools, courts, and local government may all serve the same family while answering to different funders, databases, and performance requirements.



3

Single Agency begins by stopping this fragmentation inside the authority one organization already controls.

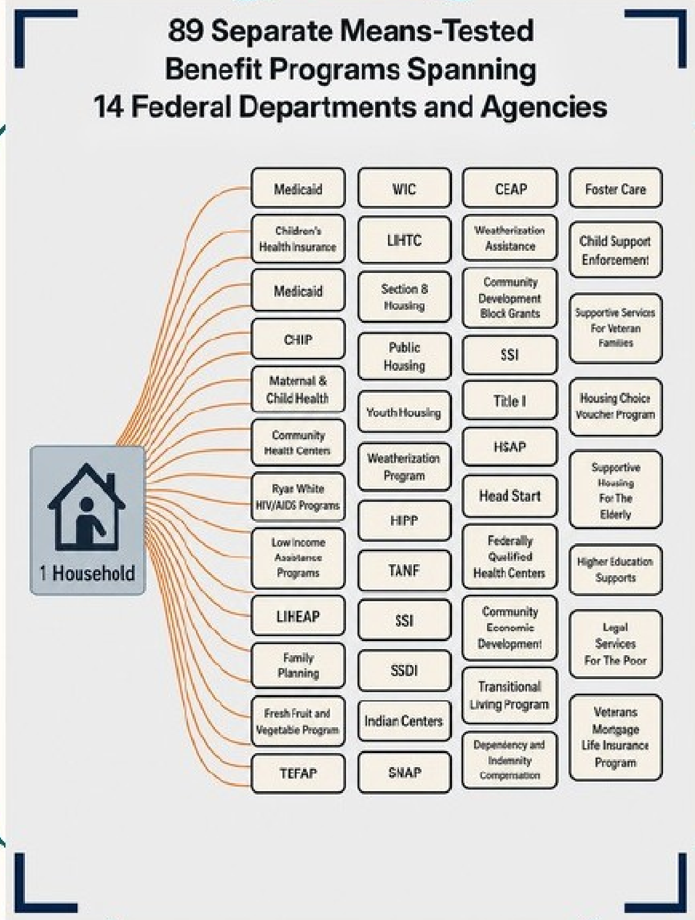
Source: The Household Experiences One Life, Chapter 18, printed page 105.

One Household. 89 Separate Programs.

The household does not experience policy categories; it experiences their combined effect.

The problem is not the programs.

The household experiences thresholds, appointments, documents, waiting periods, benefit changes, and separate decisions as one interconnected life. Every program may be necessary and still leave the household carrying the coordination burden.



4

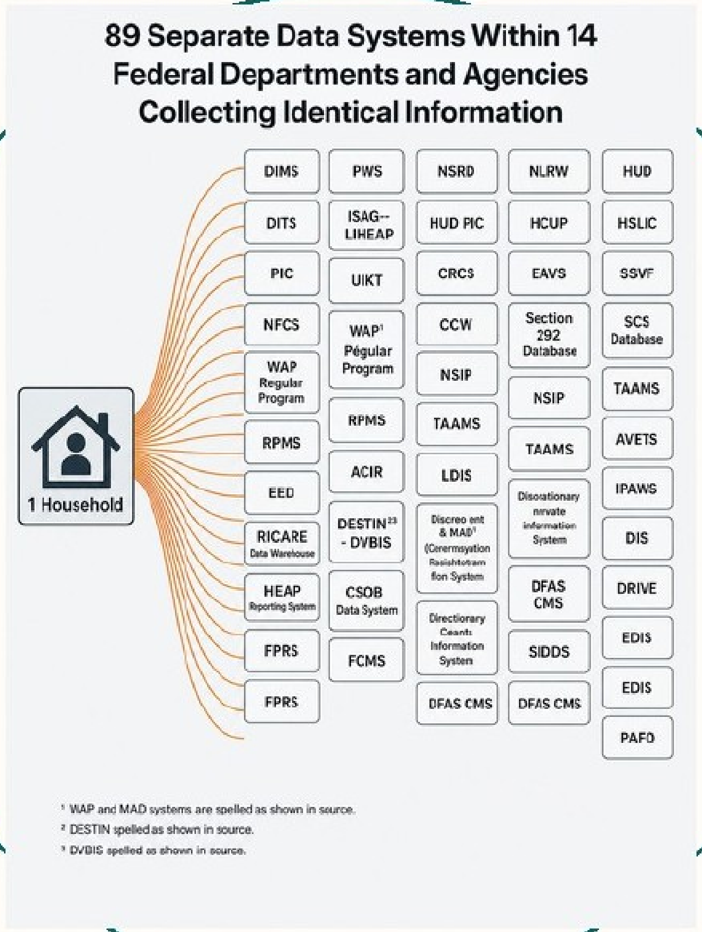
The missing layer is a household-first operating record that lets one agency organize its programs around the same reality.

One Household. Many Separate Data Systems.

Different systems collect overlapping information and preserve incompatible household stories.

Staff and families repeat the same story across systems.

Repeated intake, duplicate documents, parallel case notes, and separate reporting consume time that should be spent helping the household move forward. The burden lands on both the family and frontline staff.



5

Single Agency operating rule: Intake1 first. Required funder paperwork second. The household tells the story once whenever feasible.

Core Thesis and Operating Principle

Do Intake1 first.

1. Intake1 Assessment

Complete once whenever feasible

2. First Case Note

Create a baseline household profile

3. Shared Household Record

Keep one story, one record, one plan

4. Program and Funder Tasks

Use verified information to complete required forms

5. Ongoing Coordination

Case notes, documents, referrals, and payments stay tied to the same record

*In a single-agency implementation, Intake1 is the starting point— **not** an after-the-fact data entry location.*

INTAKE1

First Door Creates the Baseline. Every Door After Adds Expertise.

The operating principle is the same inside one organization and across authorized participating organizations.

SINGLE AGENCY

1
First internal program
Completes the Assessment and establishes the First Case Note.

2
Shared record
Connects the Mobility Plan, case notes, documents, and outcomes.

3
Later programs
Bring specialized expertise and add work to the same record.

LEAD AGENCY

1
First organization
Completes the Assessment when no shared record exists.

2
One environment
Preserves agency, program, fund, location, and user accountability.

3
Later organizations
Carry domain-specific responsibilities and document outcomes.

ONE WORKER ESTABLISHES THE BASELINE. SPECIALISTS SHARE THE WORK. THE HOUSEHOLD DOES NOT START OVER.

One Household. One Protected Document Library.

The first doorway uploads available proof. Every later doorway reviews before requesting again.

SINGLE AGENCY

- One internal program uploads available documents into the shared household record.
- Other agency programs review the same protected library instead of rescanning or asking again.
- Verified information and current proof support program and funder tasks wherever permitted.

LEAD AGENCY

- The first formally participating organization creates the protected document library.
- Later authorized organizations use role- and document-level access with a complete audit trail.
- Current, sufficient documents are reused; new copies are requested only for documented exceptions.

THE HOUSEHOLD SHOULD NOT BECOME THE FILING SYSTEM BETWEEN PROGRAMS OR AGENCIES.

What the Single-Agency Model Does—and Does Not Do

✓ This model does

- Creates one household record before program enrollment whenever feasible
- Allows verified information to carry into required program forms
- Preserves one household story across agency programs
- Uses internal supervision, reviews, and the investment ledger
- Builds proof of practice for future demonstrations

✗ This model does not

- Eliminate federal, state, local, or philanthropic funder systems
- Replace program eligibility rules, allowables, or statutory requirements
- Create cross-agency authority without authorization
- Turn one agency into a pure demonstration without a waiver
- Claim that technology alone solves household instability

Required Workflow

A consistent, agency-wide pathway from first contact to program and funder tasks.

1. Entry

Household is referred, walks in, or enters through any agency program.

2. Assessment

Trained staff complete the Intake1 Assessment whenever feasible.

3. Baseline

Intake1 creates the First Case Note and baseline profile.

4. Ten-Domain Review

Review the whole household picture, not only the presenting program.

5. Barrier Review

Identify immediate needs, benefits, employment, health, childcare, housing, and safety issues.

6. Benefits and Supports

Assess public benefits, agency supports, and the first actions in the plan.

7. Consent and Releases

Obtain household consent and any required program-specific releases.

8. Program and Funder Tasks

Complete required enrollment forms and external reporting tasks from the Intake1 record.

Shared Documents Need Shared Rules

Technology makes a document available. Policy, agreements, and program rules make it reusable.

USE EXISTING PROOF

- Review the protected library first.
- Accept current verified proof where legally permissible.
- Do not request another copy solely because a new program or agency is involved.

REQUEST NEW ONLY FOR AN EXCEPTION

- Missing or unreadable
- Changed or expired
- Insufficient for the required determination
- Original, independent, or updated verification is legally required

GOVERN AND MEASURE

- Authorization, role/document permissions, verification, expiration, versions, audits, correction, and view/download controls.
- Track duplicate requests, reuse, staff time, household burden, decision time, stale proof, and privacy incidents.

Upload once. Verify once where permitted. Reuse across authorized programs.

INTAKE1

Roles That Make It Work

Executive Leadership

Establishes Intake1 as required agency infrastructure and supports compliance.

Data Administrator

Manages users, permissions, data quality, dashboards, and reporting integrity.

Supervisors

Review First Case Notes, monitor fidelity, coach staff, and correct drift.

Integration Specialists / Frontline Staff

Assesss households, document accurately, coordinate services, and update the shared record.

Business Office

Records household investments, assistance, and payments in the investment ledger.

Leadership decision, documentation discipline, and supervision protect the model.

Shared Workload Protects the Workforce

No worker should carry the coordination failure of the entire system alone.

1

LESS DUPLICATION

Review the shared baseline instead of repeating the full intake and rewriting the same story.

2

LESS REFERRAL CHASING

Use a visible assignment, responsible specialist, status, response, and outcome inside the shared record.

3

CLEARER ROLE OWNERSHIP

Each specialist carries the part of the Mobility Plan that matches professional expertise.

4

MORE CONTINUITY

Case history, decisions, and next steps remain visible when staff change or vacancies occur.

INTENDED WORKFORCE OUTCOME

Reduce the conditions that contribute to burnout and turnover, protect time for direct work, and preserve continuity for the household.

Evidence note: Project Unity proves the internal operating foundation. Cross-agency workload sharing and improved retention remain outcomes to test.

Fast-Track Implementation

Developer preparation and agency readiness happen in parallel.

Weeks 1–2

- Leadership decision and staff assignments
- Workflow, forms, and reporting requirements finalized

Weeks 3–4

- Subscriber environment configured
- Training begins in the practice environment

Weeks 5–6

- Staff complete sample assessments and testing
- Super-users validate workflows, documents, and dashboards

Week 7

- Agencywide go-live
- All new households begin in Intake1

Week 8

- Active caseloads transferred
- Full agency use with daily problem-solving

Go-live is the decision point. Coaching and quality improvement continue after launch.

INTAKE1

Standalone Agency Pricing and Total Cost

Full-fidelity standard setup, annual renewal, and illustrative three-year cost

Program Tier	Setup	Annual Renewal	First-Year Total	Illustrative 3-Year Total
1-3 programs	$25,000	$15,000	**$40,000**	**$70,000**
4-7 programs	$30,000	$25,000	**$55,000**	**$105,000**
8+ programs	$40,000+	$35,000+	**$75,000+**	**$145,000+**

STANDARD CONFIGURATION Includes programs, fund codes, referral partners, locations, users, permissions, training, testing, and launch support. Pricing is based on program tier rather than a simple per-user fee.

Three-year totals equal the first-year total plus two annual renewals at the current starting amount. The 8+ tier remains subject to final scope and agreement.

Lead Agency Pricing

One prescribed implementation with separate agency, program, fund, location, and user accountability

Lead Agency + 1 Participating Organization

$85,000

FIRST-YEAR STARTING PRICE

Full-fidelity shared implementation

Each Additional Participating Organization

$10,000-$12,500

ADDITIONAL FIRST-YEAR COST

Standard onboarding, training, and support

Annual Renewal

$30,000+

MASTER LICENSE

+ $5,000 per participating organization

“Participating organization” means a formally enrolled agency or organization - not a household participant. Referral partners remain directory resources unless formally enrolled.

Lead Agency Total Cost by Network Size

Current August 2026 starting amounts; three-year totals are illustrative.

Implementation Scope	First-Year Total	Annual Renewal	Illustrative 3-Year Total
Lead + 1 participating organization	$85,000	$35,000+	**$155,000+**
Lead + 2 participating organizations	$95,000-$97,500	$40,000+	**$175,000-$177,500+**
Lead + 3 participating organizations	$105,000-$110,000	$45,000+	**$195,000-$200,000+**
Lead + 4 participating organizations	$115,000-$122,500	$50,000+	**$215,000-$222,500+**
Lead + 5 participating organizations	$125,000-$135,000	$55,000+	**$235,000-$245,000+**

CALCULATION

First year: $85,000 for the Lead Agency plus one participating organization, then add $10,000-$12,500 for each organization beyond the first. Renewal: $30,000+ master license plus $5,000 per participating organization. Larger networks are calculated by formula and scope.

Bridge to the Larger Model

The Intake1 pathway is Single Agency, State Infrastructure, and National Vision.

Single Agency
proof of practice

→

State Infrastructure
authorized state demonstration

→

National Vision
national adoption and shared outcomes

Until broader authority exists, one agency can still make a fundamental change: stop beginning with the grant and begin with the household.

One household. • One story. • One record. • One plan. • One shared understanding.

INTAKE1

Start with One Agency

One Household First.
Programs Second.

Build the record
Create one household story and one shared plan.

Build the discipline
Use supervision, dashboards, and the investment ledger.

Build the proof
Show what household-centered infrastructure can achieve.

“ Single-agency practice becomes **proof.** The proof becomes the **authorized demonstration.** The demonstration becomes the **national model.**

INTAKE1 | www.intake1.com