

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: November 8th, 2023
Time: 3:30pm-6:00pm
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive a progress report on the Landlord Recruitment and Retention goal, prioritize options presented by the consultant, and learn more about the Regional Investment Fund (RIF).

3:30pm Welcome and Introductions

3:40pm Public Comment

3:45pm Staff Updates

3:50pm Progress Report: Landlord Recruitment and Retention

4:40pm Prioritization: Landlord Recruitment and Retention

5:30pm Regional Investment Fund (RIF) Presentation: Part II and III

5:55pm Closing and Next steps

1. Next meeting: December 13th, 4-6pm

6:00pm Adjourn

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Tri-County Planning Body Meeting Summary

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: Wednesday, October 11th, 2023
Time: 4:00 PM – 6:00 PM
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive briefing on and discuss updates on the technical assistance goal and learn more about the Regional Investment Fund (RIF).

Member attendees

Co-chair Eboni Brown (she/her), Co-chair Matt Chapman (he/him), Zoi Coppiano (she/her), Mercedes Elizalde (she/her), Yvette Hernandez (she/her), Monta Knudson (he/him), Nicole Larson (she/her), Michael Ong Liu (he/him), Sahaan McKelvey (he/him), Cristina Palacios (she/her), Steve Rudman (he/him), Mindy Stadlander (she/her)

Elected delegates

Washington County Chair Kathryn Harrington (she/her), Multnomah County Commissioner Susheela Jayapal (she/her), Metro Councilor Christine Lewis (she/her), Clackamas County Chair Tootie Smith (she/her)

County staff representatives

Clackamas County – Adam Brown (he/him), Vahid Brown (he/him), Multnomah County – Kanoe Egleston (she/her), Breanna Flores (she/they), Washington County – Jessi Adams (she/her), Jes Larson (she/her)

Metro

Abby Ahern (she/her), Giovanni Bautista (he/him), Melia Deters (she/her), Liam Frost (he/him), Patricia Rojas (she/her)

Kearns & West Facilitators

Ben Duncan (he/him), Ariella Dahlin (she/her)

Note: The meeting was recorded via Zoom; therefore, details will be mainly focused on the discussions, with less detail regarding the presentations. Presentation slides are included in the archived meeting packet.

Welcome and Introductions

Ben Duncan, Kearns & West, welcomed the Tri-County Planning Body (TCPB) to the meeting, facilitated introductions between TCPB members, and reviewed the agenda.

The TCPB approved the September Meeting Summary.

Public Comment

No public comment was received.

Tri-County Planning Body Meeting Summary

Staff Updates

Abby Ahern, Metro, shared that a monthly progress report detailing the TCPB Regional Goal Progress was shared in the meeting packet. She stated that Focus Strategies is finalizing their landlord recruitment and retention work and will present to the TCPB in November, that Home Base has begun their workgroup meetings on coordinated entry, that the Medicaid Waiver Tri-county Partnership Group is continuing to meet on healthcare system alignment, and that Home Base will soon begin convening workgroups regarding living wage.

Mercedes Elizalde asked for more information on the stakeholders involved in the landlord recruitment and retention interviews and workgroups.

Liam Frost, Metro, responded that Metro will share the list of stakeholders and that more information will be provided in the TCPB presentation next month.

Liam Frost, Metro, shared that Home Base will be reaching out to some TCPB members for participation in the living wage work group. He reminded TCPB members to email Melia Deters, Metro, if they are interested in participating in a small group to provide feedback to Dan Cole and Multnomah County and noted that 3 members have expressed interest. He shared that Supportive Housing Services (SHS) committee member applications will be closing soon and followed up that Metro is finalizing a draft process regarding co-chair selection per co-chair Eboni Brown's request.

Co-chair Eboni Brown asked if there is an age requirement and shared that her daughter was interested in applying.

Liam Frost, Metro, responded that Metro would check with their legal team.

Patricia Rojas, Metro, shared that Metro is hiring a few manager positions and that 51 individuals attended an information session regarding the availability.

Vahid Brown, Clackamas County, shared that its Community Development team hired two new staff to help launch new programs, including the Medicaid Waiver program.

Jes Larson, Washington County, and Breanna Flores, Multnomah County, both shared that progress is being made on their individual SHS Annual Reports.

Progress Report: Technical Assistance

Liam Frost, Metro, reminded TCPB members of the Technical Assistance Goal language and highlighted that the goal is unique since Metro is directly supporting this work, which will expand to the counties over time.

Abby Ahern, Metro, detailed the Technical Assistance Problem Statement and defined technical assistance and capacity building. Abby introduced a panel discussion with co-chair Eboni Brown, Sahaan McKelvey, Monta Knudson, and Zoi Coppiano to share their experience and expertise of technical assistance.

Co-chair Eboni Brown shared that for the past two years, her organization Greater Good Northwest, has received technical assistance grants for building better training programs and executive director training. Eboni shared that the executive director training helped her learn how to effectively run an organization. She added that her organization is at the end of a comprehensive training plan for staff.

Monta Knudson shared that his organization, Bridges to Change, has been providing technical assistance for smaller organizations for the past five years, focusing on risk mitigation, financial management, and human resources. He noted that sometimes smaller organizations don't know what they don't know, and the trainings his organization frontload all the information needed.

Tri-County Planning Body Meeting Summary

Washington County Chair Kathryn Harrington asked if frontloading information meant if a new executive director shared that they need training on X, Monta's organization would also provide Y and Z training based on their experience and discretion.

Monta Knudson confirmed that is what he meant.

Zoi Coppiano stated that in addition to what Monta and Eboni discussed, capacity building and reporting are related to technical assistance. She shared that her organization, Community Action of Washington County, received funding to strengthen its data team to work with Service Point. She noted that another grant source is a capacity building grant with Washington County for needs assessment planning.

Abby, Metro, thanked the TCPB panel for sharing their technical assistance experience.

Jessi Adams, Washington County, presented on Washington County's work with technical assistance. She shared that SHS funding requires financial and data quality reports, and to review these reports Washington County hired a data quality position and changed its internal structure to meet the needs of individual service providers. She added that Washington County launched a capacity-building technical assistance grant that has two phases. The first phase looks at the organization's infrastructures and identifies any needs, and the second phase is to implement those identified needs.

Vahid Brown, Clackamas County, shared that their approach is similar to Washington County. He stated that Clackamas County meets monthly with contract providers to identify any areas where support is needed and that the Clackamas County HMIS team provides technical assistance support including trainings and office hours. He added that Clackamas County convenes providers to build community and recognize hard work and that it recently launched an organizational development program. The program has a two-phase approach, the first phase helps providers identify any technical assistance needs, and the second phase includes receiving funds to address any needs that are identified. He provided an example of technical assistance and capacity building as it relates to service provider administrative funds.

Breanna Flores, Multnomah County, shared that similarly, Multnomah County focused on the long-term stability of service providers. She detailed that providers used capacity-building funds to expand programming, evaluate operations, and reduce the reimbursement model burden. She noted that Multnomah County has a capacity-building work group that meets monthly and is reviewing its recommendations. She added that Multnomah County has 20 technical assistance consultants that providers can work with to support organizational development, program design, and human resources. She highlighted that most of the funds this year have gone to equity-focused trainings and practices.

Sahaan McKelvey shared that his organization, Self Enhancement, Inc. (SEI), recently used technical assistance to support their United States Department of Housing and Urban Development audit and to support the utility allowance equation. He stated that SEI provides technical assistance to smaller nonprofits, including support in program development. He emphasized that culturally specific providers provide technical assistance to other organizations consistently to maximize community benefits, but often don't receive funding for it.

Liam Frost, Metro, highlighted that technical assistance is extremely broad, and shared that Metro is building a regional capacity team that will be charged with developing programming for technical assistance, training, job fairs, and conferences. He emphasized that Metro's role is to provide value and consistency and to do no harm. He noted that the team is currently hiring, and once all positions are filled, they will develop an implementation plan for the TCPB to review.

Tri-County Planning Body Meeting Summary

Patricia Rojas, Metro, added there are economies of scale and Metro can provide infrastructure support for technical assistance.

Mercedes Elizalde asked to clarify if Clackamas County hired a consultant to justify the 10% administrative rate and how many organizations are stuck at the 10% rate.

Vahid Brown, Clackamas County, replied no. He stated that the 10% de minimis fee is automatic if a service provider does not have a federally negotiated administrative rate.

Adam Brown, Clackamas County, replied that he does not have the number of organizations offhand, but can share it over email. He stated that most organizations either seek a federally approved indirect rate, a formal cost allocation plan, or the 10% de minimis. He highlighted that Clackamas County honors whatever rate an organization has and there is no cap. He added that technical assistance is intended to support organizations to understand their cost structure and rates and that rates should be consistent across contracts. He noted that county staff are working to align rates across counties.

Kanoe Egleston, Multnomah County, responded that each year they update provider rates and will follow up with that number of organizations at 10% de minimis.

Jes Larson, Washington County, responded that this is an opportunity for improvement as well and are working on alignment.

Patricia Rojas, Metro, replied that they honor federally negotiated rates and that organizations can be penalized for having different rates. She added that smaller organizations need technical assistance to pursue a negotiated rate, and this is an area where alignment would be helpful.

Adam Brown, Clackamas County, added that there was a historical issue where there was an arbitrary cap at 15%, which was corrected four years ago at the county level, but the Oregon Housing & Community Services Department still has a 15% cap at the state level. He noted that Governor Kotek's Executive Order aligns with federal best practices that indirect rates are a program cost.

Co-chair Matt Chapman shared that he is impressed by the technical assistance work underway and that the biggest challenge for organizations is not knowing what they don't know.

Liam Frost, Metro, noted that a Tri-County Request for Pre-Qualifications (RFPQ) has been issued to help counties develop a team of technical assistance contractors. He highlighted that Metro wants to be additive and not to do harm.

Jes Larson, Washington County clarified that the RFPQ is for technical consultant services, not service providers who deliver programs.

Patricia Rojas, Metro, added that once Metro's technical assistance team is hired, it will work collaboratively with service providers and county staff to make structural changes to elevate the work.

Metro Councilor Christine Lewis shared that she liked the philosophy of being additive, not duplicative, and looks forward to the TCPB reviewing and approving the technical assistance work plan. She noted that there wasn't any data presented today and highlighted that people are running before walking regarding risk assessment. She emphasized the importance of building a system where providers can seek help with risk assessment, without jeopardizing their work and reputation. She asked how Monta's organization does that.

Ben Duncan, Kearns & West, noted that Monta had to leave, but will follow up with an answer.

Tri-County Planning Body Meeting Summary

Cristina Palacios stated that it is important to be proactive to close the pay gap on equity by funding Black, Indigenous, and People of Color (BIPOC) organizations at higher rates. She added that a 15% administrative cap was a barrier as BIPOC and rural organizations have difficulties increasing capacity. She suggested that the TCPB consider how to make pay equitable and elevate the needs of smaller organizations. She asked if there was data on rural and BIPOC organizations' pay rates.

Adam Brown, Clackamas County responded, that it's important to meet organizations where they are at and that they are trying their hardest to amend historic inequities. He added that the RFPQ will have technical assistance for organizations to secure funding to build capacity and that he can share that data offline.

Clackamas County Chair Tootie Smith stated the next Metro hire should be an accountant, advocated for full financial transparency, and asked to see monthly budgets for the TCPB. She noted that the TCPB hasn't reviewed any budgets and that needs to be addressed.

Metro Councilor Christine Lewis replied that Metro has an elected auditor and that the SHS measure requires audits. She noted that the TCPB can decide what financial information is needed monthly for review since the infrastructure is there to provide it.

Patricia Rojas, Metro, highlighted that the SHS Oversight Committee has the charge of financial oversight and receives monthly reports on SHS finances. She encouraged those who are interested to attend those meetings and that the materials are publicly available.

Mindy Stadlander highlighted that there are capacity-building dollars available in the 1115 Waiver, and looked forward to identifying solutions to empower and link housing and health organizations.

Sahaan McKelvey reflected that the capacity-building conversation started out in the context of technical assistance and the group did a deep dive on an indirect rate. He added that an inadequate indirect rate continues the poverty cycle of providers, which needs to be addressed, and that capacity-building dollars are a temporary solution to ensure organizations are funded directly. He said that the do-no-harm philosophy should be how technical assistance is received and not for jurisdictions to tell organizations what to do.

Nicole Larson asked if there is standard language of what technical assistance is funded and if the reimbursement model applies to all counties and providers.

Liam Frost, Metro, replied that each county has developed a different approach with consistent standards.

Steve Rudman stated that he is impressed with the work underway and noted that it is important to have honest discussions and think about what makes sense to do regionally and what makes sense to locally.

Regional Investment Fund: Part II

This agenda item was not discussed.

Closing and Next Steps

Ben Duncan, Kearns & West, reflected the conversation themes the TCPB discussed.

Co-chair Matt Chapman shared that he felt the quality of conversations the TCPB has increases at each meeting and noted his concern about having enough time to address all issues. He suggested having meetings go longer occasionally to address all topics while also respecting other time commitments.

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Washington County Chair Kathryn Harrington asked if someone could articulate what the result was of the good discussion they had.

Co-chair Matt Chapman reflected that the TCPB created a deeper level of common understanding and alignment in approaches. He noted that Metro looks to the TCPB for guidance and feels that Metro has guidance now based on the discussion on how to go about their technical assistance role.

Ben Duncan, Kearns & West, shared that from a process perspective as the TCPB moves from goal language to the regional plan, due diligence is needed. He added that this conversation looked like in practice what questions would need to be asked of the regional plan to ensure it can move to the Oversight Committee for review.

Nicole Larson thanked Metro for emailing out the TCPB role chart which was helpful.

The next steps include:

- Next meeting: November 8th, 4-6 pm.
- Metro to share the list of stakeholders involved in the landlord recruitment interviews and workgroups.
- Metro to check with their legal team on if there is an age requirement to be on the SHS Committees.
- Counties to share which organizations are at the 10% indirect cost rate and how many of those organizations are rural or BIPOC.
- Monta to share how his organization can provide risk assessment help without jeopardizing the work an organization is doing.

Adjourn

Adjourned at 6:00 p.m.

METRO SUPPORTIVE HOUSING SERVICES TRI-COUNTY PLANNING BODY

Monthly progress report | November 2023

The goal of this report is to keep the TCPB, the Supportive Housing Services Regional Oversight Committee, Metro Council and other stakeholders informed about ongoing regional coordination progress. A more detailed report will be provided as part of the SHS Regional Annual Report, following submission of annual progress reports by Clackamas, Multnomah, and Washington Counties.

TRI-COUNTY PLANNING BODY REGIONAL GOALS*

Goal	Progress
Unit/landlord recruitment and retention	At the November meeting, Focus Strategies will present their findings to the TCPB along with county staff.
Coordinated Entry	Metro’s consultant, Home Base, has conducted interviews with key Coordinated Entry Regional Alignment Workgroup members and jurisdictional partners. Homebase will coordinate monthly recurring Coordinated Entry Regional Alignment Workgroup meetings, the first of which will be November 13th.
Healthcare system alignment	The Medicaid Waiver Tri-county Partnership group is continuing the development of recommendations for operationalizing waiver benefits. Leadership continues to explore other opportunities for regional cross-system healthcare and housing coordination and integration.
Training + Technical Assistance	Metro is currently in the process of hiring a Regional Capacity Team Manager. Once on board, the manager will work with counties and service providers to build out a series of regional capacity building programs. Metro has already filled a “work-out-of-class” Program Manager position who is helping scope the work and lay the groundwork for the team, including a regional request for qualifications for technical assistance providers in collaboration with the counties.
Living Wage	Homebase is conducting a scan of local and national service provider compensation practices, including interviews with local service providers and staff from continuum of care programs across the country. The first of three planned Stakeholder Workgroup meetings, comprised of local housing

service providers, will occur on November 9th. The goal will be to have a draft framework to deliver to TCPB early next year.

**A full description of regional goals and recommendations are included in Attachment 1.*

EXISTING REGIONAL PROGRAMS

Quarter 3 progress (January-March 2023): Regional Long Term Rent Assistance program



The data comes from the SHS quarterly reports, the reports, which includes disaggregated data (by race and ethnicity, disability status and gender identity) can be accessed here: <https://www.oregonmetro.gov/public-projects/supportive-housing-services/progress>

Risk Mitigation Pool: Launched in Q3 in partnership with the Housing Development Center. The new regional risk mitigation fund will provide financial reimbursement to landlords who partner with the Regional Long Term Rent Assistance program and experience any financial loss during tenancy. Next, the Counties will work with Housing Development Center to develop outreach strategies, education, and marketing materials to recruit and retain landlords as partners in ending homelessness.

- Metro convened the RLRA Risk Mitigation Pool group provided feedback on Oregon Housing and Community Services' draft PSH Risk Mitigation Pool framework, which was modeled after our regional policies. Additional coordination and alignment efforts with the state through implementation of the program are still being determined.

TRI-COUNTY PLANNING BODY GOAL AND RECOMMENDATION LANGUAGE

May 10th, 2023

COORDINATED ENTRY

- Goal:** Coordinated Entry is more accessible, equitable and efficient for staff and clients.
- Recommendations:** Map the unique challenges and successes of each of the three Coordinated Entry Systems.
- Assess opportunities to create connectivity among the three Coordinated Entry Systems to improve equitable access and work towards regionalizing some tools within Coordinated Entry.
- Explore opportunities for co-enrollment with other systems.

REGIONAL LANDLORD RECRUITMENT

- Goal:** Increase the availability of readily accessible and appropriate housing units for service providers.
- Recommendations:** Contract with a qualified consultant to identify areas where regionalization can support existing and future county efforts and submit recommendations.
- Develop a regional communications campaign to recruit new landlords, including specific outreach and engagement to culturally specific media and BIPOC community groups.

HEALTHCARE SYSTEM ALIGNMENT

- Goal:** Greater alignment and long-term partnerships with healthcare systems that meaningfully benefit people experiencing homelessness and the systems that serve them.
- Recommendations:** Metro staff convenes and coordinates with counties and key healthcare systems stakeholders to identify opportunities that integrate the Medicaid waiver with the Supportive Housing Services initiative. Bring draft proposal with next steps and timeline to committee within 6 months.

TRAINING

- Goal:** Service providers have access to the knowledge and skills required to operate at a high level of program functionality; the need of culturally specific providers will be prioritized through all program design.

Recommendation: Counties and Metro coordinate and support regional training that meets the diverse needs of individual direct service staff, with sensitivity to the needs of BIPOC agencies.

TECHNICAL ASSISTANCE

Goal: Organizations have access to the technical assistance required to operate at a high level of organization functionality; the need of culturally specific providers will be prioritized through all program design.

Recommendation: Counties and Metro coordinate and support regional technical assistance and investments in capacity building especially among culturally specific providers.

EMPLOYEE RECRUITMENT AND RETENTION

Goal: County contracts for SHS funded agencies and providers will establish standards throughout the region to achieve livable wages for direct service staff.

Recommendations: Map current wage and benefit conditions.

Draft a housing-worker wage framework that provides guidance to Counties and SHS-funded agencies and providers and includes contracting evaluation and alignment.

Consider ways to allow for differential pay for lived experience, bilingual employees, and culturally specific organizations.

Consider ways to address challenges faced by organizations with multiple funding streams.

Assess reasonable scale of outcomes and case load as it relates to compensation.

Within each Supportive Housing Services (SHS)-funded agency, monitor the distribution of pay from lowest to highest paid staff to ensure improvements in pay equity.



MEMORANDUM

Date: October 30th, 2023

To: Patricia Rojas, Regional Housing Director, Oregon Metro
Liam Frost, Regional Housing Assistant Director, Oregon Metro

From: Marc Jolin, Senior Consultant, Focus Strategies
Hana Gossett, Consultant, Focus Strategies

Topic: National and Local Approaches to Unit Acquisition and Opportunities to Strengthen Local Unit Acquisition Efforts

BACKGROUND

In 2020, voters in Multnomah, Clackamas, and Washington Counties approved an unprecedented measure to fund the expansion of supportive housing services for people experiencing homelessness in the region. The Supportive Housing Service Measure (SHS) also directed Metro to create the Tri-County Planning Body (TCPB), tasked to work with the Counties to identify and implement regional strategies and investments to meet the supportive housing needs of the region's unhoused population.

One opportunity for greater regional coordination and investment identified by the TCPB, Metro, and the Counties (the Partners) focuses on increasing the number of rental housing owners and managers (housing providers) making units available to people experiencing homelessness. While the creation of new affordable housing units is essential, meeting the SHS goals of housing thousands of unhoused people also requires expanding access to existing units in the rental housing market.

Metro contracted with Focus Strategies to assess local strategies and promising practices, and to identify opportunities to improve local unit acquisition efforts. This Memorandum summarizes local efforts to build partnerships between local government, social service

agencies, and housing providers; reviews national models of system-level unit acquisition strategies; and uses learnings from both to identify opportunities to develop a larger-scale, more effective, efficient, and equitable unit acquisition strategy for the counties and the region.

DEFINING UNIT ACQUISITION AND ITS KEY COMPONENTS

Throughout this Memorandum, the work of helping unhoused people identify and access rental housing in the private market, including through the development of partnerships with housing providers, is referred to as "unit acquisition." This phrase is inclusive of, but broader than, what is often referred to as "landlord recruitment" work. Acquiring units in the existing rental market often involves recruiting and retaining housing providers to partner with local government, social service agencies, and those seeking housing. However, there are other critical aspects to helping people gain access to rental units, and those are important to address as well when designing a unit acquisition system.

The unit acquisition process can be understood in terms of several key components that can each be explored individually. However, the effectiveness of each element depends significantly on how it is implemented as part of an integrated and aligned unit acquisition strategy.

A. Housing Provider Incentives

Unit acquisition systems generally include a variety of incentives offered to housing providers in exchange for their flexibility on admission criteria and to offset any additional administrative costs associated with participating in a public rental subsidy program.¹ Housing provider incentives typically take one of two forms: (1) financial payments, upfront or reimbursed, to offset additional operating expenses that may arise in connection with participating in the program; and (2) various housing problem solving or tenancy support services that help ensure that the housing providers has a long-term stable tenant.

¹ In communities without a prohibition on refusing to rent to someone with a rental voucher, incentives may also be needed to encourage housing providers to accept a voucher. Oregon law prohibits refusing to rent to someone because they will pay their rent with a voucher, and also prohibits source of income discrimination more broadly. See ORS 659A.421(1)(d).



B. Outreach and Education of Housing Providers

Ongoing outreach and education for housing providers about the community's unit acquisition efforts, incentives available, and participation requirements, is an essential component of any unit acquisition strategy. The best outreach and education strategies include sophisticated community-wide multi-media communications that reach large numbers of potential housing providers, offer ready access to specific program information, and inform housing providers how to successfully participate in the programs.

C. Formalizing Housing Provider Partnerships

Where acquiring units involves a housing provider accepting certain incentives in exchange for taking on the administrative costs of program participation and reducing the barriers for prospective tenants, the terms and conditions of that exchange must be negotiated and formalized into an agreement. These agreements can be negotiated between an individual social service provider and housing providers, but communities often have this work done by one entity that negotiates agreements on behalf of a group of participating social service providers. Partnership agreements are written and can take the form of memorandums of understanding (MOU), but system-level acquisition programs typically use agreements with legally binding language.

D. Unit Search and Inventory Management

An unassisted unit search process involves a prospective tenant identifying units on their own, including using publicly available databases, like Craigslist. A first level of support with the search process is to have housing case managers/navigators who help prospective tenants search websites and visit properties. More robust unit acquisition systems that include formalized partnerships with housing providers further facilitate the unit search process. They create listings of units available from housing provider partners that include key information about the units, screening criteria, and the application process. They feature sophisticated web-based platforms that list units and amenities, have search functions geared toward people who are seeking housing with a public subsidy, and allow for ongoing system performance monitoring.

E. Barrier Removal

The number of rental housing units available to unhoused people can be expanded without formal housing provider partnerships by addressing the other barriers, beyond screening



criteria, that often limit a person's ability to successfully access housing in the private market. Many of these barriers are financial: application fees, deposits, and past rental and utility debts; furnishings for an apartment; moving expenses; and the ongoing expense of rent and utilities. Other barriers can be addressed through tenant education on navigating the application, household set-up (e.g., establishing utilities), and ongoing responsibilities of tenancy. Housing case management can assist with additional barrier removal, such as securing necessary documents, expungement of past criminal convictions, supporting the completion of applications and reasonable accommodation requests, and helping with the logistics of the household set-up/move-in process. These are all critical services that support unit acquisition without requiring concessions from housing providers.

F. Problem Solving Supports

Problem solving supports, in this context, are services provided to the tenant and housing provider after someone is in housing. They help resolve emerging issues that could jeopardize the tenancy. These are sometimes referred to as mediation or tenancy support services. Unlike wrap-around support services that are provided by a social service provider for the overall well-being of the tenant, problem solving supports are provided as-needed to specifically address issues that emerge and threaten to lead to a formal notice of lease violation and eviction. Housing problem solving supports typically include the ability for the housing provider to make timely contact with a service provider that will promptly respond, typically in person at the unit. That service provider will work with the tenant and with property management to find a resolution to the issue jeopardizing the tenancy.

G. Performance Evaluation and Program Improvement

Although not present in all unit acquisition efforts, the most effective systems monitor key performance indicators, including, for example, the number and diversity of available housing units, the number of people acquiring units, the success of different social service provider partners in accessing and retaining people in units, and the number and performance of housing providers that are part of the effort. These mechanisms are critical to understanding who is and is not being served well by the unit acquisition effort and to ensure that both social service providers and housing providers are meeting their commitments to the program and its participants. The ability to monitor system performance in these ways is critical to ensuring that the unit acquisition system is meeting its commitment to reducing, and not exacerbating, racial and other disparities in rates of homelessness.



CURRENT STATE OF UNIT ACQUISITION EFFORTS IN TRI-COUNTY REGION

Within the Metro area, there are multiple similar but distinct unit acquisition efforts. Individual social service agencies have programs and staff dedicated to engaging with housing providers and generating rental opportunities for their participants. Social service agency stakeholders shared that within their agencies individual housing case managers often build and maintain their own relationships with housing providers. Notably, the social service agencies with their own unit acquisition programs tend to be larger, well-established, and often majority-culture organizations.

At the local governmental level, there are also multiple programs designed to encourage housing providers to make rental housing units available to people experiencing homelessness. The region's housing authorities each have programs that address the challenges that the holders of Housing Choice Vouchers (HCV) and other long-term federal subsidies face finding units to rent. All three Counties additionally have unit acquisition programs connected to state and local sources of rental subsidy, in particular the SHS-funded Regional Long-Term Rental Assistance (RLRA) program.

The State of Oregon funds the Rent Well Program, which is administered in the region by Transition Projects. That program equips prospective tenants with the knowledge and skills required to be successful tenants. Participants who successfully complete the class receive a certificate and are eligible to offer housing providers a \$2,500 damage guarantee to cover the costs of unit repair that exceed the tenant's deposit. The State has created an online portal where housing providers participating in the Rent Well program can list their units and Rent Well participants can search for those units.

In Multnomah County, in addition to the multiple social service agency programs, the housing authority's programs, and the new RLRA recruitment efforts, there are several stand-alone efforts to partner with housing providers. These include ongoing commitments to previous re-housing initiatives like Move In Multnomah, and a new program of landlord recruitment connected to the Governor's Homelessness State of Emergency and Multi-Agency Collaborative (MAC).

These various initiatives each include the key elements of a unit acquisition strategy, but due to the limited scope of most of the efforts, the elements are often underdeveloped and



insufficiently resourced. The multiple social service provider, county, and state level unit acquisition programs run the risk of duplicating efforts and creating confusion and frustration for housing providers, social service providers, and prospective tenants. As discussed in more detail below, there are also concerns about inequities that may exist in the current landscape of local unit acquisition efforts. National models and local stakeholder feedback suggest that there are opportunities to explore how consolidation, integration, and/or alignment of aspects of these efforts would yield improved unit acquisition outcomes at the county and regional levels.

NATIONAL UNIT ACQUISITION MODELS

Nationally, the United States Department of Housing and Urban Development (HUD), the National Alliance to End Homelessness (NAEH), and the United States Interagency Council on Homelessness (USICH) have recommended that communities adopt a concerted and systematic approach to unit acquisition.

To gain an understanding of the national unit acquisition landscape, Focus Strategies reviewed literature from HUD, NAEH, and USICH, published resources from various communities, and interviewed leaders associated with some of the most prominent national unit acquisition systems.

The recommendations from national leaders to develop system-level unit acquisition strategies began in approximately 2015 and coincided with the growing difficulty in identifying housing units for people experiencing homelessness, especially in high-rent, low-vacancy communities. In 2018, USICH published a list of the core components of a landlord engagement strategy.² These core components are largely comparable to what is found in other national resources and recommendations:

1. **Centralized Hotline** – Offer a single access point for housing providers to connect with social service providers should issues arise that could jeopardize the tenancy.

² USICH, *Landlord Engagement*. Updated May 25, 2018. <https://www.usich.gov/solutions/housing/landlord-engagement/>. Last Accessed: October 8, 2023.



2. **Housing Search Assistance** – Staff dedicated to building relationships with housing providers and may have duties that include participating in lease negotiations, unit inspections, etc.
3. **Risk Mitigation Funds** – Accessible funding for when there is damage to units above what the security deposit will pay. An option that can support housing providers in being willing to rent to participants they would deem “higher risk.”
4. **Availability of Neutral Mediators** – A neutral party that is available to respond to housing provider/tenant concerns and help resolve conflicts. This allows case managers and housing providers to focus on their primary roles in relation to the tenant.
5. **Flexible Funds** – Available to pay for fees or other expenses that are not covered by most subsidies, such as move-in support, deposits, or inspections.
6. **Landlord and Tenant Education** – Classes or one-on-one coaching for both landlords and tenants to inform them on issues such as rights and responsibilities, fair housing, and financial management.
7. **Landlord Recruitment Events** – Dedicated events to bring together the community and bring new housing providers to hear of successful partnerships and tenancies.
8. **Leadership** – Public service announcements about the need for housing providers to support by increasing the available housing supply for people exiting homelessness.

Document reviews and interviews with representatives from communities that have worked on successful unit acquisition systems in Phoenix, Houston, Texas Balance of State, Seattle, Denver, Dallas, Los Angeles, and San Francisco, provide insight into how nationally identified best practices are being implemented at the local level. These communities are illustrative, but each community’s context is unique. Each County and the Metro region will need to assess how best to adapt the learnings from these communities to their unique local circumstances. Unit acquisition systems reviewed for this Memorandum align with national guidance and generally share the following features:

1. **An Online Portal** – A user-friendly community-wide database of units available through participating housing providers and accessible to housing navigators and those seeking housing; the most sophisticated portals support housing search, housing application, and system monitoring and improvement.



2. **Consolidated Administration & Operations** - One organization or entity commonly oversees and operates components of the unit acquisition process on behalf of multiple social service providers and their program participants. This organization or entity typically has dedicated staff to, for example, support recruiting and maintaining relationships with housing providers, keep the online portal up to date, administer financial incentives, and, in some cases, provide housing problem solving services.
3. **Consistency for Housing Providers and Partners** - A high priority is placed on providing consistent and sustained organizational leadership to ensure a streamlined unit acquisition process for the benefit of social service agencies, housing providers, and the unhoused people searching for units.
4. **Encompass Multiple Funding Streams and Housing Types** - The unit acquisition system is designed to support multiple subsidy and housing types. The benefits from a system-level unit acquisition effort are greatest where it supports individuals who have a variety of long and shorter-term housing subsidy types, and where partnerships are developed with housing providers that operate larger, smaller, and non-traditional housing portfolios located across a diversity of geographic areas.

National research and best practices literature provides relatively little insight into the racial equity impacts of system-level unit acquisition strategies. This is an important consideration as the Partners assess whether and how to incorporate elements of these systems locally. In interviews, representatives of model programs identified several potential equity benefits from developing integrated unit acquisition systems, including:

1. **More Equitable Access and Outcomes** - A system that consolidates marketing, negotiation, financial incentive management, and unit inventory management on behalf of a large network of social services agencies, rather than relying on each agency to do that work itself, may be especially beneficial to smaller, less well-resourced, and emerging service providers. To the extent that these are disproportionately culturally specific organizations serving BIPOC and other marginalized communities, the consolidation strategy may offer those organizations and the people they serve better support and yield more equitable housing access and outcomes.
2. **Fewer Opportunities for Disparate Treatment** - Systems that consolidate marketing and negotiating partnerships with housing providers on behalf of multiple social service agencies may reduce the opportunity for housing providers to treat culturally



specific organizations and their participants less favorably when deciding who to work with and what kind of flexibility to offer applicants on screening criteria.

Local stakeholders and representatives of several nationally recognized programs also pointed out that there are equity risks with consolidation and standardization. A primary risk is that the unique needs and resources of BIPOC and other marginalized communities could be neglected in these systems if they are not intentionally designed using an equity lens. In addition to designing each element of the unit acquisition system to advance racial equity commitments, culturally specific organizations should continue to have support and flexibility to build relationships with housing providers in their communities that are tailored to the specific circumstances and opportunities that exist for their participants.

UNIT ACQUISITION AS ONE COMPONENT OF THE LOCAL HOMELESSNESS RESPONSE SYSTEM

Unit acquisition is only one component of any system designed to help unhoused people end their homelessness. This was emphasized in interviews with social service providers when asked what they would identify for the Partners as the most important ways to increase permanent housing options for unhoused people. Their responses often did not focus on creating additional housing provider partnerships. Instead, they recommended, for example, that the Partners prioritize increasing the total inventory of deeply affordable housing. They called out the need for more universally available long-term subsidies and the ability for their participants to enforce their rights as tenants.

In several cases, interviewees pointed to the inability to attract and retain staff to provide housing navigation and support services because of insufficient pay and unsustainable workloads. They pointed to unrealistic caseloads that housing case managers must carry, and the resulting impact on their ability to respond effectively to tenants and housing providers when issues arise. Interviewees also elevated the need for intensive wrap-around services in supportive housing, particularly for people with serious behavioral health challenges and for the growing portion of the unhoused population that struggles to meet their activities of daily living.

Most of these issues are beyond the scope of this Memorandum to explore in-depth. They are nonetheless an important reminder to the Partners as they decide what regional



investments to make. In addition to expanding partnerships with housing providers, there are significant needs in other aspects of the unit acquisition process and in the overall homelessness response system.

OPPORTUNITIES FOR FURTHER EXPLORATION

A good deal can be learned from successful system-level unit acquisition strategies around the country, and from some of the very good work happening in the Metro region. At the highest level, the opportunities for the Metro region involve exploring ways to consolidate and align elements of the multiple existing unit acquisition efforts. The fragmented unit acquisition landscape in the Metro area is leading to certain redundancies, potential inefficiencies, and inequities. While consolidating and aligning may address some of these challenges, there are limits and potential downsides to those strategies that any system-level approach to unit acquisition in the Metro region will need to take into account. In addition, the opportunities may look different in each of the counties based on the unique features of their homelessness response systems.

What follows are opportunities for further exploration that could move the counties and the region toward a more effective, efficient, and equitable unit acquisition system, provided they are implemented in a manner that respects the unique dynamics within different areas of the region and the impact of any system change on BIPOC and other marginalized communities. In summary, the opportunities include:

- Apply an equity lens to all program design and implementation work;
- Develop a comprehensive communication and education program for housing providers;
- Consolidate partnership formation responsibilities;
- Rationalize the system of financial incentives;
- Explore expanding agency leasing for those with the greatest barriers³;
- Prioritize quality problem solving services;
- Consolidate key aspects of tracking and providing access to unit inventory; and

³ This Memorandum uses the locally adopted phrase “agency leasing” instead of “master leasing”.



- Invest in unit acquisition services beyond housing provider partnerships.

A. Apply an equity lens to all program design and implementation work

Metro and the Counties directed Focus Strategies to apply an equity lens to the research for this Memorandum. Doing so made it clear that there are crucial equity considerations in all phases of the unit acquisition process. Any unit acquisition program that the Partners set out to develop - whether at the regional or county level - should center equity in the design and implementation of each of its components. The unit acquisition process should ensure that populations historically underserved and overrepresented in homelessness are equitably served by the community's unit acquisition efforts. Initial equity considerations are incorporated in the remaining opportunities set out below.

B. Develop a comprehensive communication and education program focused on housing providers

As the national best practices literature and model programs around the country recognize, communication and education directed to owners and managers of rental housing is an essential element of any successful unit acquisition strategy. Locally, the Counties have developed communications campaigns for individual initiatives in the past, but they do not currently have a coordinated, ongoing, communications strategy to help recruit housing providers. The Counties are developing county-specific communication and education materials as part of the RLRA program, and materials are in development to support the implementation of the MAC. However, social service providers report that their participants and case managers feel primarily responsible for identifying and educating housing providers on the specifics of rental assistance programs, support services, and available incentives.

In interviews, social service agency staff highlighted the opportunity that exists for the Partners to help identify, educate, and train housing providers on the full range of subsidy and support service programs in the region. While some of these efforts are already underway among the Counties' RLRA landlord liaisons, providers requested a larger communications campaign that would bring housing providers to them. They also requested a website and other materials that they can direct housing providers to, where they can learn about the various subsidy and support services programs, their requirements, and the available incentives for participation.



The Partners have an immediate opportunity to explore investing in a sustained, multi-faceted regional communications campaign that targets housing providers with information about the benefits of partnering with local social agencies to lease their units. Such a campaign would include:

- Advertising that reaches the widest possible audience of housing providers, and that prioritizes media and messaging that will reach BIPOC, non-English speaking, and non-traditional housing providers (e.g., shared housing).
- A comprehensive source of information for housing providers on the specific benefits and requirements of partnership; this could include a website, webinars, and written materials to hand out at recruiting fairs or sent out by email. All information should be accessible to non-English speakers.
- Specific messaging and presentation of materials directed toward smaller housing providers; several stakeholders report that smaller 'mom and pop' landlords are often more prepared to be flexible on screening criteria but also are less likely to be familiar with partnering with publicly funded agencies.
- Training opportunities for housing providers on meeting the specific requirements of the various rental assistance programs and how to take advantage of the benefits offered, as well as on how to work effectively with social service providers that are supporting tenants in their buildings.

There is enough benefit and stakeholder support for a robust and inclusive communications and education strategy to warrant initial exploration of this opportunity by key County and Metro staff. In the immediate term, communications efforts, educational materials, and training would need to reflect the reality that there are multiple housing provider recruitment initiatives in place tied to different funding sources and jurisdictions. Over time, if the disparate unit acquisition efforts in the region are better aligned and integrated, the communications strategy and education materials would be adjusted to reflect the more streamlined system.

C. Consolidate partnership formation responsibilities

Nationally, communities are benefiting from investing in one organization or entity that negotiates with housing providers for units on behalf of multiple social service providers and across as many rental subsidy sources and housing types as possible. These lead organizations enter into partnership agreements with housing providers that spell out the



financial and support service benefits for the housing provider, and the level of application and screening criteria flexibility the housing provider will grant prospective tenants.

Currently, in the Metro region, social service providers are primarily responsible for negotiating individually with housing providers. In some cases, they offer financial incentives and tenancy support service models unique to their organizations. In other cases, they offer housing providers access to incentives that are tied to certain funding streams or housing initiatives.

This provider-centric approach can have significant limitations. Social service providers have varied levels of capacity to engage and varying levels of experience and expertise in negotiating with housing providers. This puts some social service providers at a disadvantage and may put service providers in a position of indirectly negotiating against each other. This approach also risks housing provider bias leading organizations that serve BIPOC and other marginalized groups to have fewer or less favorable partnership opportunities.

Consolidating efforts to negotiate housing provider partnerships within a single organization can help address these challenges, and, if implemented well, the resulting partnerships will more equitably benefit a wider range of social service providers and people seeking housing. To be effective, the lead organization needs to have expertise in the business models of various types of rental housing providers and in negotiations, and it needs the resources to pursue and finalize a large number of partnerships on behalf of social services providers.

While this approach can enhance equitable housing outcomes in the system, it should not foreclose social service providers from having the flexibility to negotiate their own partnerships where that approach advances equity goals. Culturally specific social service providers may need to be able to continue to work with potential housing providers in their communities to negotiate housing partnerships where they can do so more effectively. The exploration of tasking one organization to negotiate partnerships on behalf of multiple providers should include this and additional strategies to ensure that the unit acquisition process helps reduce disparities by improving access to units for disproportionately impacted communities of color and other marginalized communities.

D. Rationalize the system of financial incentives



A review of national programs and discussions with local stakeholders highlight several opportunities to explore increasing the efficiency, effectiveness, and equity of financial incentives offered to housing providers to encourage them to rent units to unhoused households with rental assistance and some level of support services.

1. Align the financial incentives with the level of flexibility provided

Local stakeholders and national operators emphasize the importance of ensuring that the financial incentives offered to housing providers are proportionate to the administrative costs incurred by housing providers and the amount of flexibility they show to applicants in the screening process. At one end of the spectrum, there is concern that housing providers receive financial incentives for renting to people who they could not have denied housing to under local landlord-tenant law. This is particularly a concern in a community where social service providers help people remove screening criteria barriers through strategies like payment of past debts and reasonable accommodation appeals, and where it is not lawful for a housing provider to deny someone housing because they plan to rent using a voucher.

At the other end of the spectrum, social service providers and housing providers agreed that there are unhoused people who struggle to find a rental unit because the standardized and capped financial protections (e.g., the \$5,000 damages recovery cap offered by RLRA and the \$2,500 damages cap for Rent Well) are too low to persuade housing providers to accept the level of risk they anticipate taking with some high-barrier households. Housing providers shared that they perceive the greatest risk with households that have a history of doing significant damage to their units because of the associated level of cost and disruption to operations.

Several model unit acquisition systems address the need to align incentive levels with benefit levels by consolidating partnership formation responsibilities in one entity or organization, as described above. By focusing the system's partnership development resources, these organizations can hire staff with expertise in the financial aspects of rental housing operations and use that expertise to negotiate appropriate terms with housing providers. This strategy helps ensure that the system benefits from the financial incentives housing providers receive. It also helps address situations where the financial incentives must be higher to gain the level of housing provider flexibility needed to house people with uniquely high barriers. Rather than setting a level that applies to all participants or housing providers in a program, the level



of risk mitigation incentive can be negotiated/tiered based on the actual level of additional anticipated risk a housing provider is prepared to take on.

Having an organization or entity with expertise in housing operations and finance negotiating on behalf of a network of social service providers also helps protect against any bias that a particular housing provider may have toward people from a particular BIPOC community or another marginalized group. At the same time, any strategy adopted at the regional level to align screening concessions with incentive types and levels should allow the flexibility, and provide support, for culturally specific providers to negotiate directly with housing providers from their communities. This is necessary to ensure that the opportunities and constraints that are unique to social service and housing providers in those communities are respected and that those providers can fully participate in the system.

2. Extend SHS-funded financial incentives across types of rental assistance

Nationally, some of the most effective systems of unit acquisition bring multiple sources of rental assistance funding under the same programmatic unit acquisition umbrella. Rather than having a different set of financial incentives – and associated claim and payment processes – for each source of rental assistance, the financial incentives are standardized and available across multiple forms of rental assistance.

The Counties have developed a robust set of SHS-funded financial incentives that are currently only available to an unhoused person who has an RLRA voucher. Someone with an HCV or other federal voucher, or who is receiving assistance through the MAC or Rent Well, offers a housing provider a more limited set of financial incentives, different incentive levels, and different processes for accessing those incentives. This complexity is difficult for participants, social service providers, and housing providers to navigate, and creates inefficiencies and potential inequities.

The unique flexibility of SHS funding offers the opportunity to explore offering a consistent package of financial incentives to housing providers who agree to rent to an unhoused person with any one of several different rental subsidy types. There will be limits on which subsidy sources can be included, and some tailoring of incentives to specific subsidy types may be necessary. Despite these limits, the Partners are encouraged to fully explore the opportunity to use the flexibility of SHS to develop a program of financial incentives that is available to as wide a range of subsidy holders as possible.



3. Consider consolidating the administration of financial incentives

Currently, the region features multiple financial incentive programs, each administered separately and somewhat differently. Within the RLRA program, for example, the Counties have agreed upon the package of financial incentive types and amounts, but each County administers the financial benefits somewhat differently. In some cases, a county pays housing providers directly; in others, social service providers make the payments and seek reimbursement. One RLRA benefit type - the damages guarantee fund - is administered by a single non-profit on behalf of all three counties. Meanwhile in Multnomah County, a housing provider's claim to recover the costs of excess unit damages could go through any one of several different processes depending on the source of the tenant's rental subsidy. In addition to RLRA, there are damages guarantee processes set up through Rent Well, JOIN, Move-In-Multnomah, and the MAC.

Whether at the regional or county level, there is value in exploring the standardization and consolidation of the administration of financial incentives. Successful programs nationally remove the cost and burden of administering incentive funds from the multiple social services providers working to house people, and instead put that responsibility in a single agency or organization that performs the service on behalf of multiple community-based organizations. There are examples of non-profits, local governments, and for-profit organizations playing this role.

In interviews with social service and housing provider stakeholders, there was a recognition of the potential value of consolidating and streamlining the administration of financial incentives. It could be more efficient and beneficial to smaller organizations that lack the capacity to self-manage these kinds of financial benefits. It would significantly simplify the number of entities and processes that housing providers are required to navigate. However, housing and service provider stakeholders agreed that the most important aspect of any system of administering funds is that funds are issued quickly to take advantage of housing openings and cover housing provider costs. It is therefore critical to identify a model of financial incentive payment that meets this priority for prompt service before making changes to the current system. A consolidated but poorly functioning system of financial administration could do significant damage to current programs and lead to fewer housing provider partnerships than the region currently enjoys.



4. Evaluate and align the types of housing provider financial incentives

Nationally and in the Metro region, the types of financial incentives offered to housing providers vary. They include:

- Bonus payments for the first unit a housing provider rents to someone who is part of a program and in some cases either an equivalent or reduced “bonus payment” for each subsequent unit leased;
- Payments for the time a unit remains vacant while undergoing an inspection;
- Payments to cover repairs identified as necessary during an inspection;
- Payments to cover rent if a tenant fails to pay or is evicted; and
- Payments to cover the costs of eviction and any damages in excess of what is covered by a tenant’s deposit.

In interviews with local stakeholders and national leaders, there was no agreement on which forms of financial incentive are most productive in helping to acquire units. There was some preference among housing providers for funds that are paid upfront rather than those requiring a sometimes complicated and lengthy claim process. Housing providers also shared that the most important financial consideration is having a tenant who reliably pays the rent, whether through their own income or a rental subsidy of some kind. The question of where to focus financial incentive resources merits additional exploration with social service and housing providers.

There was a call for one benefit in particular that is not currently offered locally, and that is not offered in the national programs Focus Strategies consulted: renters’ insurance. Local government staff, social services providers, and housing providers suggested it would be valuable to offer renters insurance as a standard benefit. This may not be a commonly offered benefit because of the underwriting policies of rental insurance providers. Nonetheless, renters’ insurance would be a benefit to both the tenant and the housing provider and is worth additional exploration. The Partners are encouraged to consider discussing renters’ insurance with Oregon Housing and Community Services, as they also expressed an interest and may have tools to address implementation challenges.

In general, the most significant challenge in the Metro region with incentive types appears to be the amount of variability across unit acquisition efforts. No two efforts offer the same package of incentives and/or processes for administering the incentives. These



inconsistencies create the potential for confusion, and unnecessary competition across programs, and may disadvantage unhoused people with certain types of rental subsidies. The Partners have an opportunity to explore using the flexibility offered by SHS funding to address these inconsistencies by enhancing and standardizing the financial incentive types available to people using a range of housing subsidy types.

5. Standardize incentive levels based on administrative cost and anticipated risk

Financial incentive levels can vary significantly across unit acquisition programs for the same type of incentive. Damage guarantees, for example, may be capped at \$2,500, \$5,000, or at a multiple of base rent. Stakeholders identified several benefits of having consistency of incentive amounts across programs serving people with similar need levels. There was some concern that individual social service agencies may use incentive levels to compete against one another for the same units if they have the flexibility to adjust incentive levels to acquire a unit. Similar dynamics may emerge when rental assistance programs serving the same population offer housing providers different incentive levels. As described earlier, the preferable approach is to have a consistent set of financial incentive levels across subsidy sources that are determined by arms-length negotiations with housing providers over what is reasonable considering the amount of anticipated risk and administrative burden the housing provider takes on. This can be done through a planning process that is inclusive of the Partners, social service providers, and housing providers that established the appropriate criteria and ranges, and then through negotiated agreements with individual housing providers.

E. Explore expanding agency leasing for people with the greatest barriers

Nationally and locally, there are examples of successful partnerships with housing providers where the social service agency becomes the tenant, and the agency's participants occupy the units as sub-tenants. The advantage to the housing provider is that the financial liability that would otherwise attach to a single individual with very limited financial means instead attaches to an organization with resources and the financial backing of local government. As a tenant, the social service provider is responsible for the deposit, monthly rent, and all damages beyond wear and tear; unlike with a damages guarantee fund, or other incentive program, there is no pre-determined cap. In some cases, agency leases are for entire buildings. There are also examples where a social service agency leases individual units in a single building or spread across multiple buildings in a housing provider's portfolio.



Agency leases differ in the extent to which the social service agency takes on the day-to-day property management responsibilities that typically fall to the housing provider. Most commonly the housing provider remains responsible for all property management functions, other than tenant screening. Nationally, this is the model used by Housing Forward in Cook County Illinois, and locally the Urban League has entered into this type of agency leasing arrangement. Nationally, there are also examples of agency leases where the social services provider effectively becomes the housing provider, taking over day-to-day property management responsibilities while also providing tenant retention and, in some cases, wrap-around support services. Examples include Brilliant Corners and Delivering Innovation in Supportive Housing (DISH), both in California. Locally, JOIN has established agency leases for entire buildings in which they assume some but not all property management responsibilities.

Agency leasing models are most commonly used to secure scattered-site and whole building permanent supportive housing for high barrier participants. Taking on additional financial responsibility, and, in some cases, property management responsibilities, allows the mission-driven social services agency greater control over who to house in a unit. In situations where the agency assumes other property management responsibilities, it also enables the housing provider to implement property management practices that support housing stability for people with long histories of homelessness, including trauma-informed care and harm reduction practices. These arrangements can be more costly and therefore need to be negotiated carefully to ensure that the amount paid and the risk assumed by the social service provider is warranted in light of the amount of additional flexibility obtained to house and support people who would otherwise lack access to housing.

Local social service providers reported that one of their greatest challenges is finding housing providers who will reduce screening criteria far enough to create housing opportunities for their hardest-to-house participants. Exploring opportunities to expand the use of agency leasing models could significantly help address this challenge.

F. Prioritize quality problem-solving services

Although important, one-time financial incentives are generally less important to housing providers than having long-term stable tenants. While reliable rent is a critical component of this, equally important is that a tenant is not causing disruption or harm to other tenants, on-site staff, or the property. In interviews, social service and housing providers agreed that the



timely and effective provision of problem-solving services was typically the most important factor in creating and retaining partnerships.

Unit acquisition programs with effective problem-solving services feature:

- Regular check-ins with tenants to head off any issues that could jeopardize their housing stability (e.g., emerging conflicts with neighbors, escalating substance use, lack of housekeeping, not paying tenant portion of the rent);
- A direct line of communication - a staffed phone number/email - for property managers to use to report a problem involving a participating tenant that could jeopardize the tenancy; and
- A prompt response from a housing retention worker who has access to the resources to assist with resolving the reported problem.

These tenancy support services can be organized in a variety of ways, but the most critical consideration is the reliability of a timely and fully engaged response when an issue arises.

Nationally, there are several examples of one organization successfully maintaining a phone line/email response for housing providers on behalf of multiple social services agencies and their tenants. In some cases, the organization receiving the communication has its own problem-solving staff that are assigned to address the issue. This model aligns well with USICH's recommendation for a "Neutral Mediator" to help resolve tenancy issues. In other cases, the organization receiving the communication maintains a roster of the social service agencies that are part of the unit acquisition system, and their housing case managers. When a call comes in, they identify the agency and housing case manager who works with the tenant and that housing case manager is tasked to respond and to work with the property manager to address the issue. In programs where one organization takes the communication and another responds to the issue, it is critical that there be an agreement in place between the agency receiving the initial communication and the social service provider that establishes the responsibility for a timely and appropriate response. This commitment aligns with the problem-solving commitment in the written partnership agreement with the housing provider.

In the Metro area, the predominant approach is for each social service provider to receive communications directly from housing providers when there is a concern with a tenant who they case manage. Social service providers reported that these are often direct



communications between a property manager and an individual housing case manager. There have been efforts to create single points of contact for housing providers as part of recent housing initiatives, but both housing and social service providers reported these had been less effective than direct communications between the agency that helped house a tenant and the property manager. As part of the RLRA implementation, Washington and Clackamas Counties offer housing provider partners direct access to a “landlord liaison” who can mediate issues that arise with a tenant. However, the first point of contact and primary problem-solving responsibility remains with the social service agency providing the housing case management.

Local social service providers, and some housing providers, urged caution when considering centralizing housing problem solving services. Their concerns lie in part with previous unsuccessful efforts to set up hotlines and similar strategies. However, the most significant concern was with the potential to weaken the relationship between the social service agency providing the tenant’s case management and the housing provider. These stakeholders emphasized that their most successful partnerships were often based on relationships rather than systems and program agreements. Social service providers worried that if a separate entity is a housing provider’s first point of contact and perhaps also provides housing problem solving services, they will lose their critical connection to on-site property managers. Both social service and housing providers expressed significant concern that, if not designed well and adequately resourced, partnership agreements, MOUs, and a system designed to ensure accountability around communications, response times, and problem resolution could yield less effective partnerships than currently exist.

Scaling the process of unit acquisition to include large numbers of social service providers and housing providers across the counties and the region may prove difficult without an efficient and effective process for communicating, responding to, and resolving housing provider/tenant concerns. Consolidating the provision of these problem-solving services may achieve this. It may also help address the fact that not all social services providers have the capacity to provide robust problem-solving-services and may therefore be significantly disadvantaged in their efforts to build partnerships that yield units for their participants. At the same time, the Partners are encouraged to work closely with social service and housing providers to design a problem-solving services model that protects the ability of the social service provider to be in a direct relationship with the housing providers, and that recognizes that culturally specific providers may need to have additional problem solving strategies that



are tailored to the unique needs of their participants and the housing providers in their communities.

G. Consolidate the systems for tracking and providing access to unit inventory

Nationally, unit acquisition systems deploy robust technology platforms that maintain listings of available units. These platforms allow housing case managers and prospective tenants to search and sort for available units based on their priority amenities, the limitations of their housing subsidies, and their need for screening flexibility. They facilitate and streamline the application process. These platforms also provide data that allows the homeless response system to evaluate and improve the unit acquisition system. They track key metrics on housing providers, including, for example, how many units they list, how many units they lease through the partnership, how many of their tenants subsequently lose their housing, and how many housing providers withdraw from the system. These platforms can also collect information that allows an assessment of which social service providers are successfully accessing available units, whether tenants connected to some social service providers have better housing outcomes than others, and whether housing providers are having more challenges getting support from some social service providers than others.

These reporting capacities allow for important system-level insights, including from a racial equity perspective. System reporting can reveal, for example, whether culturally specific providers are having less success placing their participants with specific housing providers, or housing providers in a particular area. It is possible to determine whether applicants from specific racial and ethnic groups are having a harder time accessing units and retaining units. In addition to this important accountability for housing providers, data collected in these platforms can help identify system and provider level challenges with accessing units, timely and successful responses to tenant issues, and other opportunities to improve the system and outcomes for participants.

In the region currently, there are multiple more and less well-developed systems for tracking and providing access to unit inventory. There is a database maintained by the State that is accessible to Rent Well participants. In Washington and Clackamas Counties, the landlord liaisons working with the RLRA program each provide their local social service partners with email lists and have unit inventory websites in the early stages of development. In Multnomah County, there are legacy tracking systems, and new efforts underway to build a more sophisticated online platform for the MAC and perhaps RLRA; Multnomah County recently



announced a partnership with Housing Connector, a program with a sophisticated online platform for unit search and system performance monitoring. In addition to these governmental efforts, there are numerous organizations developing and maintaining their own lists of housing provider partners and sharing them amongst their housing case managers.

While there may be circumstances where a provider level, or fund-source specific, tracking system is warranted, in general, the Partners would benefit from assessing the opportunities to consolidate the efforts to maintain the inventory of available partnership units. A single, well-designed, user-friendly, and adequately funded portal can be easier for housing navigators and participants to use, offer them a great deal more information and support in the housing search and lease-up process, and be more efficiently updated. Importantly, a portal like this can also provide prospective tenants with an expanded choice of units. One of the limitations of the current approach in the region is that a prospective applicant working with one funding source, jurisdiction, or social service provider, only has access to the units acquired by that program, jurisdiction, or provider. Offering unhoused people greater choice can advance equity goals by increasing the likelihood that people find housing with their priority amenities, near their support networks, or in their preferred communities. One online portal and process for submitting units, screening, and application process information will also benefit, and potentially expand participation, among housing providers that are asked to partner with agencies and participants working with a variety of housing subsidies and programs.

Sophisticated online platforms can offer a range of benefits, but they require a significant ongoing investment, and they are most effective when integrated into an overall unit acquisition system that fully leverages their potential. Additionally, stakeholders expressed concern that a new online platform would require social service providers to do additional data entry. They worried that the data entry would be redundant with what is already entered into the Homeless Management Information System (HMIS), and that provider data entry capacity is so limited that they could not use the platform effectively. The exploration of whether to consolidate the unit inventory and search processes into a new online platform at the county or regional levels should include careful consideration of how to address these concerns.



H. Invest in services beyond housing provider partnerships

For many unhoused people, the acquisition of an existing unit in the rental market does not necessarily depend on there being formal partnerships between local government, social service providers, and housing providers. Stakeholders, including people with lived experience, emphasized that, whether or not someone needs the benefit of such a partnership, there are other critical factors that determine a person's ability to find and retain a housing unit.

Some of the services they identified that make accessing housing possible, beyond structured partnerships with housing providers, include, access to a computer, transportation, language translation services, and access to a housing navigator or case manager who actively assists with the search, application, appeals, and move-in processes. In addition, a person may need barrier removal services, like acquiring necessary documents, expunging past convictions, paying off past landlord and utility debt, and paying for application fees and household set-up costs. Services that support retaining a unit once someone is in housing include tenant training, housing case management, and, in some cases, ready access to ongoing wrap-around support services for health, income, and community building.

Several stakeholders specifically called out the importance of tenant education as a barrier removal and housing retention service. Currently, the most developed local tenant education program connected to a unit acquisition effort is Rent Well. While the certificate of completion and risk mitigation funds offered to housing providers are intended to incentivize flexibility on screening criteria, the training that tenants receive can itself be valuable in helping them obtain and retain a unit. The courses help prospective tenants learn, or refresh their understanding, of the process for securing a unit, the responsibilities and rights associated with tenancy, and the resources available to help set up and successfully manage a new household. This is a service that only some people need, but there is an important opportunity for the Partners to look at using Rent Well, or a similar program, to expand tenant education opportunities for those seeking housing through existing or new unit acquisition efforts.

These services all have in common that they help someone acquire and retain a unit without any additional concessions from a housing provider. As one currently unhoused interviewee shared, they were repeatedly able to obtain rental housing using the standard application



process because they received housing navigation services from local social service providers. While housed, they did not have conflicts with neighbors or problems that came to the attention of property management. Nonetheless, they repeatedly lost their housing because they were not able to get the mental health support they needed, would become depressed, and would give up the unit. In this person's case, it was additional wrap around services that would have made the difference.

As the Partners explore the possibility of building out the components of a unit acquisition system, it will be essential to work with social service providers and the people they serve to determine what aspects of the unit acquisition system are in need of additional capacity, in addition to housing provider partnerships.

CONCLUSION

Reducing homelessness in the Metro region requires expanding the number of units of rental housing available to people who are unhoused. With steadily increasing rents and a large deficit in regulated deeply affordable housing units, unhoused people often find it challenging to access housing on the private market without assistance. Recognizing this, social service providers and local governments in the region have initiated multiple unit acquisition efforts over recent years, including efforts to recruit housing providers to assist with housing people with SHS-funded subsidies and support services. These multiple efforts have achieved important successes that can be drawn on, in combination with learnings from effective unit acquisition systems around the country, to develop a more robust, efficient, effective, and equitable approach to unit acquisition in the region. Doing so will require using an equity lens to assess where consolidating elements of the unit acquisition process will yield more equitable outcomes for those who are unhoused, where it is crucial to preserve flexibility and autonomy for social service providers, and how best to adapt and integrate each of the critical elements of the unit acquisition process to local circumstances.



APPENDIX A: RESEARCH AND STAKEHOLDERS INTERVIEWED

In preparing this Memorandum, Focus Strategies relied on nationally available research and documentation of best practices in unit acquisition and landlord engagement. In addition, Focus Strategies reviewed documents, reports, online materials, and conducted interviews with leaders in local and nationally recognized unit acquisition programs. Focus Strategies interviewed state and county policy and program staff in the Metro region responsible for unit acquisition efforts, as well as experienced and emerging social service providers engaged in helping unhoused people acquire rental units. In identifying organizations to interview, an emphasis was placed on reaching out to staff from culturally specific organizations and staff working in all three counties. Focus Strategies interviewed representatives of the leading regional association of housing providers, companies that manage portfolios of private market and regulated units, and a private market housing provider that actively partners with multiple social service agencies in Multnomah County. Four one-on-one interviews were conducted with people with lived expertise, three in housing and one who is currently unhoused. Each interviewee with lived expertise was compensated with \$50.00 for their time. All interviews and listening sessions included specific questions derived from the TCPB's adopted equity lens.

The timeline and scope of this project limited the breadth and number of interviews Focus Strategies was able to conduct. The Partners are encouraged to include targeted community engagement in any efforts to design and implement programs based upon the opportunities for exploration outlined in the Memorandum.

Stakeholder Interview List

The following is a list of the stakeholders that Focus Strategies engaged during the information gathering process through one-on-one interviews and focus group sessions:

- Alicia Rios, Raphael House of Portland
- Amanda Anderson, Urban League of Portland
- Andrea Fouts, AntFarm Youth Services
- Angie Henry, Income Property Management
- Binu Joseph, Northwest Family Services
- Brooke Golden, YWCA of Greater Portland
- Caitlyn Kennedy, Transition Projects



- Cara Rothe, Beacon Village
- Chris Pence, Clackamas County
- Christine Lewis, Metro Councilor for District 2
- Corrie Ethridge, Northwest Family Services
- Crystal Rojas, El Programa Hispano Catolico
- Daniel Davis, HOM, Inc.
- Dave Bachman, Cascade Management
- Deronia James, Greater New Hope Family Services
- Deyvin Molina, Clackamas County
- Eboni Brown, Greater Good Northwest
- Emily Edwards, Oregon Housing and Community Services
- Erik Atienza, Just Compassion
- Erin Goldwater, Multnomah County
- Favoure Miller, Urban League of Portland
- Felicia Wright, Greater New Hope Family Services
- Gary Fisher, Multifamily Northwest
- Jake Kirsch, Housing Development Center
- Javonnie Shearn, Up and Over
- Jeffrey Burnham, New Narrative
- Jes Larson, Washington County
- Gurney Kimberley, JOIN
- Josh Lloyd, Multifamily Northwest
- Kris Smock, Consultant
- Lea Anne Eivers, Raphael House of Portland
- Leor Beverly, Urban League of Portland
- Liliana Weissman, Clackamas Women's Services
- Liz Hearn, Oregon Housing and Community Services
- Lizzie Goddard, Padmission
- Matt White, Housing Innovations
- Marqueesha Ollison, Urban League of Portland
- Michael Shore, HOM, Inc.
- Mike Savara, Oregon Housing and Community Services
- Miro Paljevic, Transition Projects
- Moe Farhoud, Stark Firs Management
- Monica Avila, Washington County



- Patricia Rojas, Oregon Metro
- Sara Ryan, Office of Multnomah County Commissioner District 2
- Sharon Fitzgerald, Transition Projects
- Shkelqim Kelmendi, Housing Connector
- Stacy Borke, Multnomah County Chair's Office
- Susheela Jayapal, Multnomah County Commissioner for District 2
- Tanika Woodruff, Urban League of Portland



The following materials were received
during the meeting.



Metro

Meeting will start at 3:30pm

Metro Regional Supportive Housing Services

Tri-County Planning Body | November 8th, 2023



Metro

Welcome and Opening Remarks

Agenda

- 3:30pm Welcome and Introductions
- 3:40pm Public Comment
- 3:45pm Staff Updates
- 3:50pm Regional Investment Fund (RIF) Presentation: Part II and III
- 4:40pm Progress Report: Landlord Recruitment and Retention
- 5:55pm Closing and next steps
- 6:00pm Adjourn



Metro

Public Comment



Metro

Staff Updates

County staff
present to the
Tri-County
Planning Body
(TCPB)
opportunities
for regional
alignment

TCPB
identifies
regional goals
and requests
further
analysis from
staff

Staff develop
a scope of
work for
consultant to
provide an
analysis of
current efforts
and
opportunities

Consultant
delivers
analysis to
jurisdictional
staff

TCPB
considers
analysis and
staff input

Counties
create a draft
implementation
plan

TCPB reviews
draft
implementation
plan for
approval

**Supportive
Housing
Services
Oversight
Committee**
(SHSOC)
approves
implementation
plan



Metro

Regional Investment Fund

Part II

Regional Strategy Implementation Fund – Part Two

Guiding Documents Summarized:

- Counties must contribute **at least five percent of their SHS allocation of program funds** towards the Regional Strategy Implementation Fund
- The TCPB is required to approve and monitor county expenditures after the TCPB has developed goals and provided the counties with a plan detailing those goals

Regional Strategy Implementation Fund – Part Two

SHS Years 1 and 2:

- Counties focused on building out programs that **directly serve people experiencing homelessness** throughout the region
- TCPB was launched in the Summer/Fall of 2022

NOTE: The RIF is intended to **enhance and strengthen the systems** in service of regional coordination, i.e. **not fund direct services**

Regional Strategy Implementation Fund – Part Two

Tri County Coordination in Years 1 and 2:

- Regional Long Term Rent Assistance Coordination
- Tri County Point in Time Count Coordination
- Landlord Recruitment and Retention
- Regional Risk Mitigation

Regional Strategy Implementation Fund – Part Two

RIF Totals (5% of allocated program funds):

	<i>FY20-22*</i>	<i>FY22-23</i>
Clackamas County:	\$2.3M	\$3.4M
Multnomah County:	\$4.8M	\$7.3M
Washington County:	\$3.5M	\$5.3M

*Years 0 and 1 are combined due to the receipt of revenue beginning in April 2021 ¹¹

Regional Strategy Implementation Fund – Part Two

RIF Cumulative Total (Years 0-2 combined – FY21, FY22 & FY23):

Clackamas County:	\$5.7 million
Multnomah County:	\$12.1 million
Washington County:	\$8.9 million
RIF TOTAL	\$26.8 million

Regional Strategy Implementation Fund – Part Two

Years 0-2 combined RIF Expenses (FY21, FY22 & FY23):

RIF Total: \$26.8 million

County Expenses: \$0.3 million

Total RIF Carryover FY24: \$26.5 million

Regional Strategy Implementation Fund – Part Two

County Estimated RIF Year 3 (FY24):

- Clackamas County: \$2.3 million
- Multnomah County: \$4.8 million
- Washington County: \$3.5 million

*based on FY24 SHS revenue budget of \$234.1 million; not inclusive of carryover from prior years

Regional Strategy Implementation Fund – Part Two

County RIF Investment Areas (Year 3 – FY24):

- Capacity Building
- Health-Housing Integration
- Administrative Consolidation
- Regional Risk Mitigation



Metro

Questions

Regional Investment Fund – Part II



Metro

Landlord Recruitment and Retention

Progress Report

County staff present to the Tri-County Planning Body (TCPB) opportunities for regional alignment

TCPB identifies regional goals and requests further analysis from staff

Staff develop a scope of work for consultant to provide an analysis of current efforts and opportunities

Consultant delivers analysis to jurisdictional staff

TCPB considers analysis and staff input

Counties create a draft implementation plan

TCPB reviews draft implementation plan for approval

Supportive Housing Services Oversight Committee (SHSOC) approves implementation plan



F O C U S
strategies

PRESENTATION TO THE TRI-COUNTY PLANNING BODY

**UNIT ACQUISITION IN THE METRO REGION:
OPPORTUNITIES TO EXPLORE**

PRESENTER: MARC JOLIN (HE/HIM) DATE: NOVEMBER 9, 2023

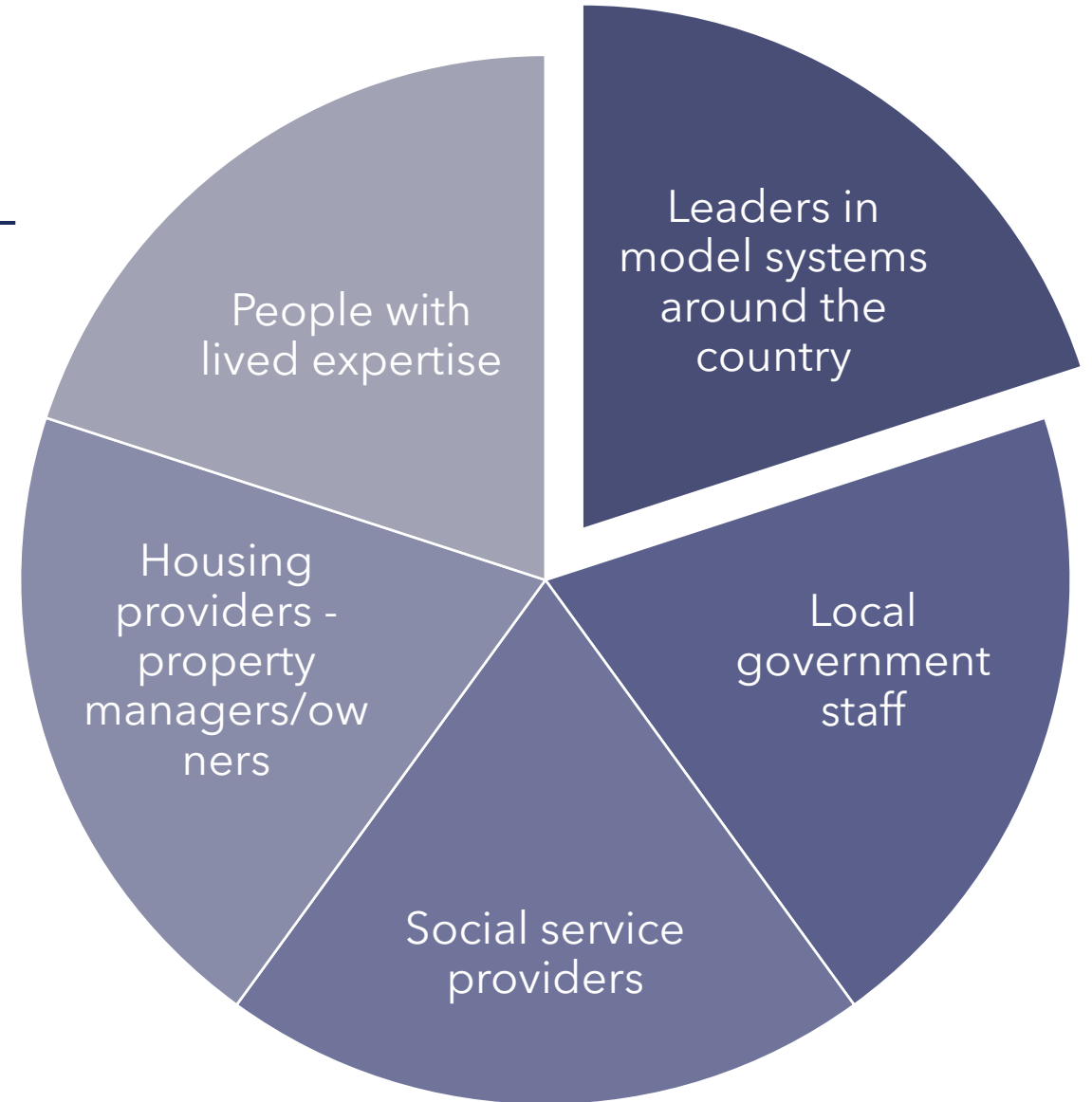
Overview

- Information Gathering
- National Models
- Local Context
- Equity Considerations
- What We Heard
- Opportunities to Explore



Information Gathering

- Reviewed national best/promising practices literature, webinars, and models
- Conducted interviews with key partners to inform this work



National Models

- Coordinated, sustained, multi-modal outreach and education for housing providers
- Financial incentives and highly responsive problem-solving services tied to offset housing provider administrative costs and reduce screening barriers
- Consolidated partnership negotiation and incentive administration for multiple social service providers and across subsidy types



Photo by [Morgan Lane](#) on [Unsplash](#)

National Models

- Problem solving services that reliably respond to issues that jeopardize tenancy
- Sophisticated platform for tracking and searching housing inventory
- Ongoing monitoring of system performance

Local Context



FOCUS
strategies

- A wide array of unit acquisition initiatives tied to different providers, jurisdictions, and subsidy types; new initiatives are in development
- Local efforts have the elements of a unit acquisition system, but are frequently underdeveloped due to lack of necessary resources



Local Context (continued)

- Incentive types, levels, and implementation/access processes vary significantly by initiative, creating complexity for social service and housing providers
- Unit inventories are maintained for specific agencies, jurisdictional initiatives, and subsidy types; approaches include emails, spreadsheets, and websites
- Most processes are heavily reliant on individual agencies to identify, educate, negotiate, and problem solve with housing providers

Equity Considerations

- Each element of the unit acquisition system can advance equity, or exacerbate disparities; application of equity lens is critical
- Reliance on individual social service providers to lead unit acquisition can disadvantage smaller, emerging, culturally specific providers and their participants



Equity Considerations (continued)

- Consolidation of unit acquisition can extend benefits to wider array of organizations and expand choice for people needing housing
- Consolidation risks not centering the needs and opportunities of culturally specific providers and their participants; system support and flexibility is necessary
- Unit acquisition systems need the capacity to evaluate processes and partners to ensure they are advancing racial equity goals

What We Heard

- Relationships matter; systems and agreements cannot replace them
- Reliable and effective problem-solving supports matter more than individual financial incentives because the goal is stable tenancies
- When it comes to financial incentives, the most important consideration is timely payment
- The most significant challenge is finding housing for those with the highest barriers



Photo by [Jason Goodman](#) on [Unsplash](#)

What We Heard (continued)

- Other aspects of the unit acquisition process that are as important as housing provider partnerships and they need investment
- Efforts at consolidation must reflect the unique circumstances in each of the counties
- Any new unit acquisition system must be designed to reduce racial disparities and do more to house BIPOC and other marginalized communities than current efforts

Opportunities for Further Exploration

- Comprehensive communication and education program for housing providers
- Consolidate partnership formation responsibilities
- Rationalize the system of financial incentives
- Explore expanding agency leasing for those with the greatest barriers
- Prioritize quality problem solving services
- Consolidate key aspects of tracking and accessing unit inventory
- Invest in unit acquisition services beyond housing provider partnerships



Metro

Discussion

Landlord Recruitment and Retention



Metro

Closing and Next Steps

Next Steps

- Post approved meeting summary online
- Next meeting: December 13th, 2023

Meeting Adjourned



01:49:02 Zoila Coppiano/ Ella/She: mic please
02:33:09 Chair Tootie Smith, Clackamas County Commission: Trust is an issue. Forcing consolidation before counties are ready will not be met well. Again the tax is paid by our local taxpayers whom we answer to.
02:40:49 Chair Tootie Smith, Clackamas County Commission: The landlords I talk to like vouchers. has that been considered?
02:43:35 Chair Tootie Smith, Clackamas County Commission: there is an assumption that larger and bigger is more efficient. that's not necessarily true.
02:44:29 Eboni Brown: When we are recruiting landlords we are using vouchers, many still don't feel comfortable participating
02:53:02 Jessi Adams: lost audio
02:53:08 Chair Tootie Smith, Clackamas County Commission: m too
02:53:08 Vahid Brown: Metro video feed is frozen
02:53:43 Chair Tootie Smith, Clackamas County Commission: I need to go to another meeting.
02:55:23 Jessi Adams: I can hear you again
02:56:48 Breanna Flores (she/they) JOHS: We can hear you and it sounds like other mics in the room are on as well
03:11:52 Vahid Brown: no I think Jes said it well
03:13:28 Kanoe Egleston: Agreed Vahid
03:26:42 Zoila Coppiano/ Ella/She: mic