Council meeting agenda

Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Thursday, September 19, 2024   **10:30 AM**   **Metro Regional Center, Council chamber and https://zoom.us/j/615079992 (Webinar ID: 615079992) or 888-475-4499 (toll free)**

This meeting will be held electronically and in person at the Metro Regional Center Council Chamber. You can join the meeting on your computer or other device by using this link: https://zoom.us/j/615079992 (Webinar ID: 615 079 992)

If you wish to attend the meeting, but do not have the ability to attend by phone or computer, please contact the Legislative Coordinator at least 24 hours before the noticed meeting time by phone at 503-797-1916 or email at legislativecoordinator@oregonmetro.gov.

1.   Call to Order and Roll Call

2.   Public Communication

Public comment may be submitted in writing. It will also be heard in person and by electronic communication (video conference or telephone). Written comments should be submitted electronically by emailing legislativecoordinator@oregonmetro.gov. Written comments received by 4:00 p.m. the day before the meeting will be provided to the council prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda item on which you wish to testify to legislativecoordinator@oregonmetro.gov. Those wishing to testify in person should fill out a blue card found in the back of the Council Chamber. Those requesting to comment virtually during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at legislativecoordinator@oregonmetro.gov. Individuals will have three minutes to testify unless otherwise stated at the meeting.

3.   Consent Agenda

    3.1   Resolution No. 24-5432 For the Purpose of Appointing One New Member To The Metro Supportive Housing Services Community Oversight Committee   **RES 24-5432**

        Attachments: Staff Report
                    Resolution No. 24-5432
                    Exhibit A

4.   Ordinances (Second Reading and Vote)

4.1   Ordinance No. 24-1518, For the Purpose of Annexing to the Metro District approximately 6.94 Acres in Hillsboro on the North Side of NE Schaaf St at the intersection with NE 62nd Ave   ORD 24-1518

Presenter(s):   Glen Hamburg, Metro

Attachments: Ordinance No. 24-1518
Staff Report
Exhibit A
Attachment 1

5.   Other Business

5.1   Supportive Housing Services County FY24 Quarter Four Reports   24-6119

Presenter(s):   Yesenia Delgado (she/her), SHS Manager, Metro
Rachael Lembo (she/her), Finance Manager, Metro

Attachments: Staff Report
Attachment A
Attachment B
Attachment C

5.2   Presentation of Performance Measures Audit Results   24-6120

Presenter(s):   Brian Evans (he/him), Metro Auditor

Attachments: Performance Measures Audit Highlights
Performance Measures Audit

6.   Chief Operating Officer Communication

7.   Councilor Communication

8.   Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្ដឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គ ប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើររបស់លោកអ្នក ។

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3.1 Resolution No. 24-5432 For the Purpose of Appointing One New Member To The Metro Supportive Housing Services Community Oversight Committee
Consent Agenda

Metro Council Meeting Thursday,
September 19, 2024

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPOINTING ONE NEW	)	RESOLUTION NO. 24-5432
MEMBER TO THE METRO SUPPORTIVE HOUSING	)	
SERVICES COMMUNITY OVERSIGHT COMMITTEE	)	Introduced by Chief Operating
	)	Officer Marissa Madrigal with the
	)	Concurrence of Metro Council
	)	President Lynn Peterson

WHEREAS, Metro's Supportive Housing Services Program has a Regional Oversight Committee to oversee the program, with the following responsibilities: reviewing local implementations plans, accepting and reviewing annual reports from the local implementation partners, monitoring financial aspects of program administration, and providing annual reports to the Metro Council; and

WHEREAS, the Regional Oversight Committee's membership is governed by Metro Code Section 2.19.280; and

WHEREAS, the Regional Oversight Committee is composed of 15 members (five each from the three counties in the region) along with one representative each from the Clackamas, Multnomah and Washington County Boards of Commissioners, Portland City Council and Metro Council; and

WHEREAS, Metro Code Section 2.19.280 authorizes the Metro Council President to appoint members to the Regional Oversight Committee; and

WHEREAS, the Metro Council President has appointed one new member to the Committee, with terms to begin on September 19, 2024, and to end on September 18, 2026; and

WHEREAS, these new committee members satisfy the membership attributes set forth in Metro Code Section 2.19.280; and

WHEREAS, the Metro Council desires to confirm those new appointments; now therefore

BE IT RESOLVED that the Metro Council confirms the appointments of new members to the Supportive Housing Services Regional Oversight Committee to a two-year term as set forth on Exhibit A attached to this Resolution. The term will begin on September 19th, 2024, and end on September 18th, 2024.

ADOPTED by the Metro Council this 19th day of September 2024.

_____
Lynn Peterson, Council President

Approved as to Form:

_____

Carrie MacLaren Metro Attorney

Exhibit A to the Resolution No. 24-5432

**Supportive Housing Services Regional Oversight Committee
Committee Member Appointments**

The following person will serve a two-year term from September 19th, 2024 through September 18th, 2026. They are eligible thereafter to serve one additional two-year term:

1. Kai Liang

IN CONSIDERATION OF RESOLUTION NO. 24-5432 FOR THE PURPOSE OF APPOINTING ONE NEW MEMBER TO THE METRO SUPPORTIVE HOUSING SERVICES COMMUNITY OVERSIGHT COMMITTEE

Date: September 10, 2024   Prepared by: Breanna Hudson
Department: Housing
Meeting date: September 19, 2024

ISSUE STATEMENT

Resolution 24-5432 appoints one new member to serve two-year terms on the Supportive Housing Services Regional Oversight Committee.

The new oversight committee member is:
1. Kai Liang

Current committee members

Below is a summary of current members and their terms.

Committee members	County they represent	Appointment
Dan Fowler	Clackamas	Appointed to a one-year term in 2020; reappointed in 2021 for an additional 2-year term; reappointed for a second two-year term starting January 2024.
Cara Hash	Clackamas	Appointed to a two-year term in 2024.
Peter Rosenblatt	Clackamas	Appointed to a two-year term in 2024.
Mandrill Taylor (co-chair)	Clackamas	Appointed to a one-year term in 2020; reappointed in 2021 for an additional 2-year term; reappointed for a second two-year term starting January 2024.
Jenny Lee	Multnomah	Appointed to a one-year term in 2020; reappointed in 2021 for an additional 2-year term; reappointed for a second two-year term starting January 2024.
Carter MacNichol	Multnomah	Appointed to a one-year term in 2020; reappointed in 2021 for an additional 2-year term; reappointed for a second two-year term starting January 2024.

Jeremiah Rigsby	Multnomah	Appointed to a two-year term in 2022; reappointed for a second two-year term starting January 2023.
James Bane	Washington	Appointed to a two-year term in 2024.
Mitch Chilcott	Washington	Appointed to a two-year term in 2024.
Felicita Monteblanco	Washington	Appointed to a one-year term in 2020; reappointed in 2021 for an additional 2-year term; reappointed for a second two-year term starting January 2024.
Mike Savara (co-chair)	Washington	Appointed to a two-year term starting 2023.
Margarita Solis Ruiz	Washington	Appointed to a two-year term in 2024.

Spring / summer 2024 recruitment and evaluation

Based on a survey of current committee members and evaluation of current perspectives and / expertise on the committee, staff identified gaps in required member representation and therefore priorities for the current recruitment:

- Lived and / or worked in Clackamas (1 member) and Multnomah (1 member) and counties
- People who have lived experience of houselessness
- People with experience overseeing, providing or delivering supportive housing services
- Representatives from business, faith and philanthropic areas
- People working in health and behavioral health

The application was advertised in June 2024, including announcements through the housing interested parties email list (audience approximately 1500 people), social media, and via outreach to jurisdiction and community-based organization partners and current oversight committee members.

Metro received 26 applications for Multnomah County and seven for Clackamas County, representing a diversity of professional and lived experience, and demographics. Candidates were evaluated for individual experience and expertise.

From this pool, one candidate for Multnomah County was identified; the Clackamas County vacancy remains open.

ACTION REQUESTED

Adopt Resolution No. 24-5432, appointing one new member to the Supportive Housing Services Oversight Committee for a two-year term. Through adoption of this resolution, the

new term for this one new member will be September 19, 2024, through September 18, 2026.

IDENTIFIED POLICY OUTCOMES

The Regional Oversight Committee performs the following duties as charged by the Metro Council:
- Evaluate local implementation plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
- Accept and review annual reports for consistency with approved local implementation plans;
- Monitor financial aspects of program administration, including review of program expenditures; and
- Provide annual reports and presentations to Metro Council and Clackamas, Multnomah, and Washington County Boards of Commissioners assessing performance, challenges, and outcomes.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The proposed Resolution is based on numerous policies previously adopted by the Metro Council, including but not limited to:
- Ordinance No. 20-1453 amending Metro Code Chapter 2.19 to establish the Supportive Housing Services Regional Oversight Committee
- Resolution No. 20-5136 appointing members to the Supportive Housing Services Oversight Committee by the Council President

ATTACHMENTS

- Exhibit A to the Resolution No. 24-5432

4.1 Ordinance No. 24-1518 For the Purpose of Annexing to the Metro District Approximately 6.94 Acres in Hillsboro on the North Side of NE Schaaf St at the Intersection with NE 62nd Ave
Ordinance (Second Reading and Vote)

Metro Council Meeting
Thursday, September 19, 2024

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ANNEXING TO THE METRO DISTRICT BOUNDARY APPROXIMATELY 6.94 ACRES LOCATED NORTH OF NE SCHAAF ST IN HILLSBORO	)))))	ORDINANCE NO. 24-1518 Introduced by Chief Operating Officer Marissa Madrigal with the Concurrence of Council President Lynn Peterson

WHEREAS, QTS Hillsboro III, LLC has submitted a complete application for annexation of 6.94 acres of Hillsboro ("the territory") to the Metro District; and

WHEREAS, the Metro Council added the territory to the urban growth boundary (UGB) by Ordinance No. 04-1040B adopted on June 24, 2004; and

WHEREAS, Title 11 (Planning for New Urban Areas) of the Urban Growth Management Functional Plan requires annexation to the district prior to application of land use regulations intended to allow urbanization of the territory; and

WHEREAS, Metro has received consent to the annexation from the owners of the land in the territory; and

WHEREAS, the proposed annexation complies with Metro Code 3.09.070; and

WHEREAS, the Council held a public hearing on the proposed amendment on September 12, 2024; now, therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. The Metro District Boundary Map is hereby amended, as indicated in Exhibit A, attached and incorporated into this ordinance.

2. The proposed annexation meets the criteria in section 3.09.070 of the Metro Code, as demonstrated in the Staff Report dated August 26, 2024, attached and incorporated into this ordinance.

ADOPTED by the Metro Council this 19th day of September 2024.

_____
Lynn Peterson, Council President

Attest: Approved as to form:

_____   _____
Georgia Langer, Recording Secretary   Carrie MacLaren, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF ORDINANCE NO. 24-1518, FOR THE PURPOSE OF ANNEXING TO THE METRO BOUNDARY APPROXIMATELY 6.94 ACRES LOCATED NORTH OF NE SCHAAF ST IN HILLSBORO

Date: August 26, 2024   Prepared by: Glen Hamburg
Department: Planning, Development & Research   Associate Regional Planner

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BACKGROUND

CASE: AN-0524, Annexation to Metro District Boundary

PETITIONER: QTS Hillsboro III, LLC
                        12851 Foster St
                        Overland Park, KS 66213

PROPOSAL: The petitioner requests annexation of territory in Hillsboro to the Metro District Boundary.

LOCATION: The subject territory, totaling approximately 6.94 acres in area, is located on the north side of NE Schaaf St in Hillsboro. The subject territory can be seen in Attachment 1.

ZONING: The territory is currently zoned FD-20 by Washington County. However, the City of Hillsboro has also assigned the property a comprehensive plan designation of Industrial (IN) and, upon annexation to the City, the property could be zoned Industrial Sanctuary (I-S)

The territory was added to the urban growth boundary (UGB) in 2004. The territory must be annexed into the Metro District for urbanization to occur.

APPLICABLE REVIEW CRITERIA

The criteria for an expedited annexation to the Metro District Boundary are contained in Metro Code (MC) Section 3.09.070.

3.09.070 Changes to Metro's Boundary
    (E) The following criteria shall apply in lieu of the criteria set forth in subsection (d) of section 3.09.050. The Metro Council's final decision on a boundary change shall include findings and conclusions to demonstrate that:

        1.   The affected territory lies within the UGB;

Staff Response:
The territory was brought into the UGB in 2004 through the Metro Council's adoption of Ordinance No. 04-1040B. Therefore, the affected territory is within the UGB and the application meets the criteria of MC Subsection 3.09.070(E)(1).

> 2. *The territory is subject to measures that prevent urbanization until the territory is annexed to a city or to service districts that will provide necessary urban services; and*

Staff Response:
The subject territory has a Washington County urban holding zone designation of FD-20, which prevents the territory's urbanization until it is annexed to a city (e.g., the City of Hillsboro) and rezoned by that city for urban land uses. Therefore, the application meets the criteria in MC Subsection 3.09.070(E)(2). The subject territory is also already proposed for annexation to the City of Hillsboro under local file number AN-008-24.

> 3. *The proposed change is consistent with any applicable cooperative or urban service agreements adopted pursuant to ORS Chapter 195 and any concept plan.*

Staff Response:
The subject territory is already within the UGB and therefore is not in an urban reserve with a concept plan. The subject territory has a City of Hillsboro comprehensive plan land use designation of "Industrial" (IN). The applicant anticipates that water service for future urban development would be provided by the Tualatin Valley Water District, and that sanitary and stormwater services will be provided by Clean Water Services (CWS). The proposal is not inconsistent with any adopted cooperative or urban service agreement. The application meets the criteria in MC Subsection 3.09.070(E)(3).

ANALYSIS/INFORMATION

Known Opposition: There is no known opposition to this application.

Legal Antecedents: Metro Code 3.09.070 allows for annexation to the Metro District boundary.

Anticipated Effects: This amendment will add approximately 6.94 acres to the Metro District. The land is currently within the UGB and approval of this request will allow for the urbanization of the land to occur consistent with the City of Hillsboro Comprehensive Plan.

Budget Impacts: The applicant was required to file an application fee to cover all costs of processing this annexation request. Therefore, there is no budget impact.
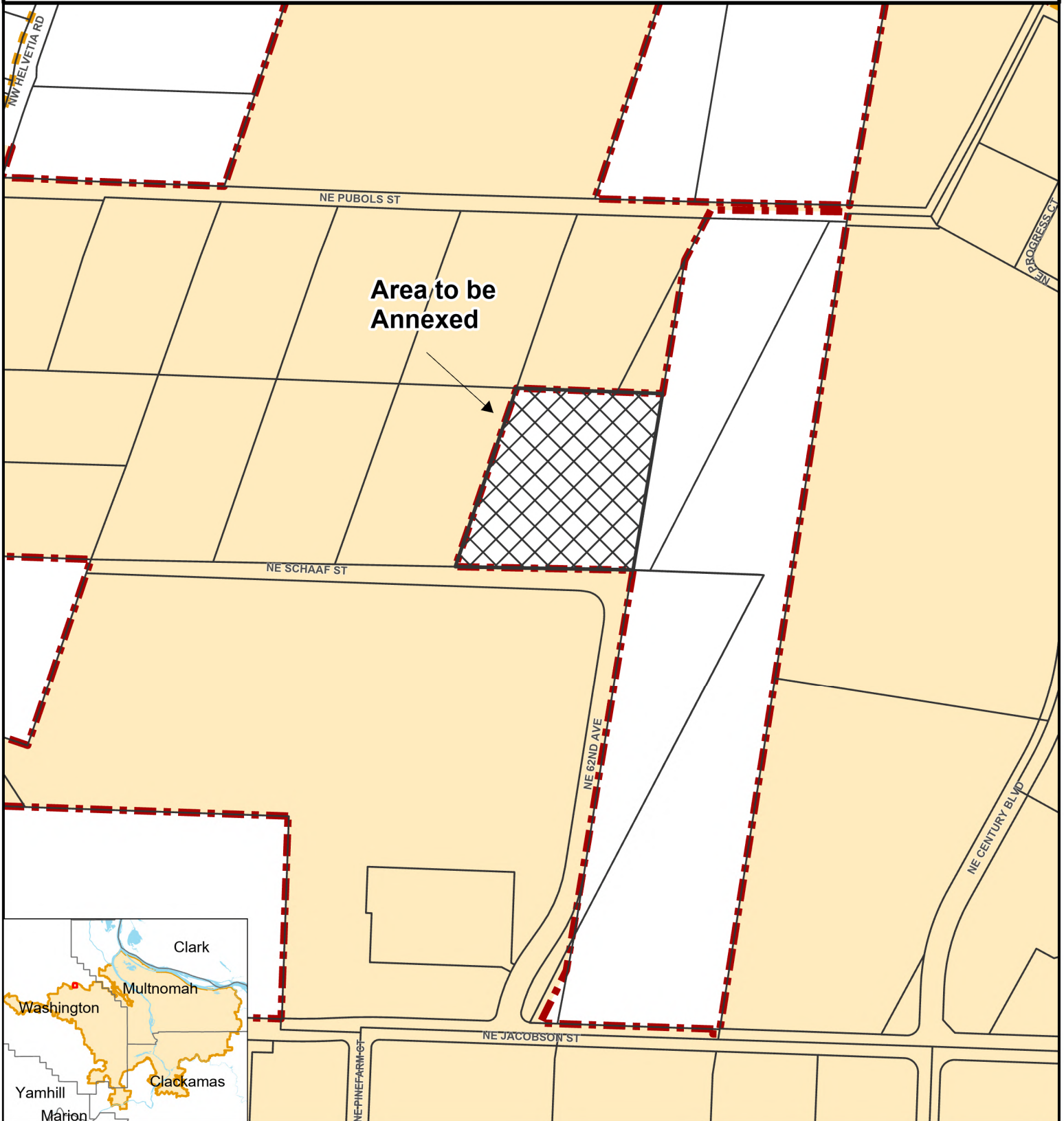
RECOMMENDED ACTION

Staff recommends adoption of Ordinance No. 24-1518.

NW HELVETIA RD

NE PUBOLS ST

Area to be Annexed

NE SCHAAF ST

NE 62ND AVE

NE PROGRESS CT

NE CENTURY BLVD

NE PINEFARM CT

NE JACOBSON ST

Clark

Multnomah

Washington

Clackamas

Yamhill

Marion

Metro

Research Center
600 NE Grand Ave
Portland, OR 97232-2736
(503) 797-1742
http://www.oregonmetro.gov/drc

Taxlots

Urban growth boundary

Metro district boundary

Proposal No. AN0524

1:5,000

0   500   1,000 Feet

NE PUBOLS ST

NW HELVETIA RD

Area to be Annexed →

NE SCHAAF ST

NE 62ND AVE

NE JACOBSON ST

Clark

Multnomah

Washington

Yamhill

Marion

Clackamas

☐ Taxlots

▪▪▪ Urban growth boundary

▪▪▪ Metro district boundary

Proposal No. AN0524

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0   500   1,000 Feet

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NE PUBOLS ST

NW HELVETIA RD

Area to be Annexed →

NE SCHAAF ST

NE 62ND AVE

NE JACOBSON ST

Clark

Multnomah

Washington

Yamhill

Marion

Clackamas

Metro

Research Center
600 NE Grand Ave
Portland, OR 97232-2736
(503) 797-1742
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Taxlots

Urban growth boundary

Metro district boundary

Proposal No. AN0524

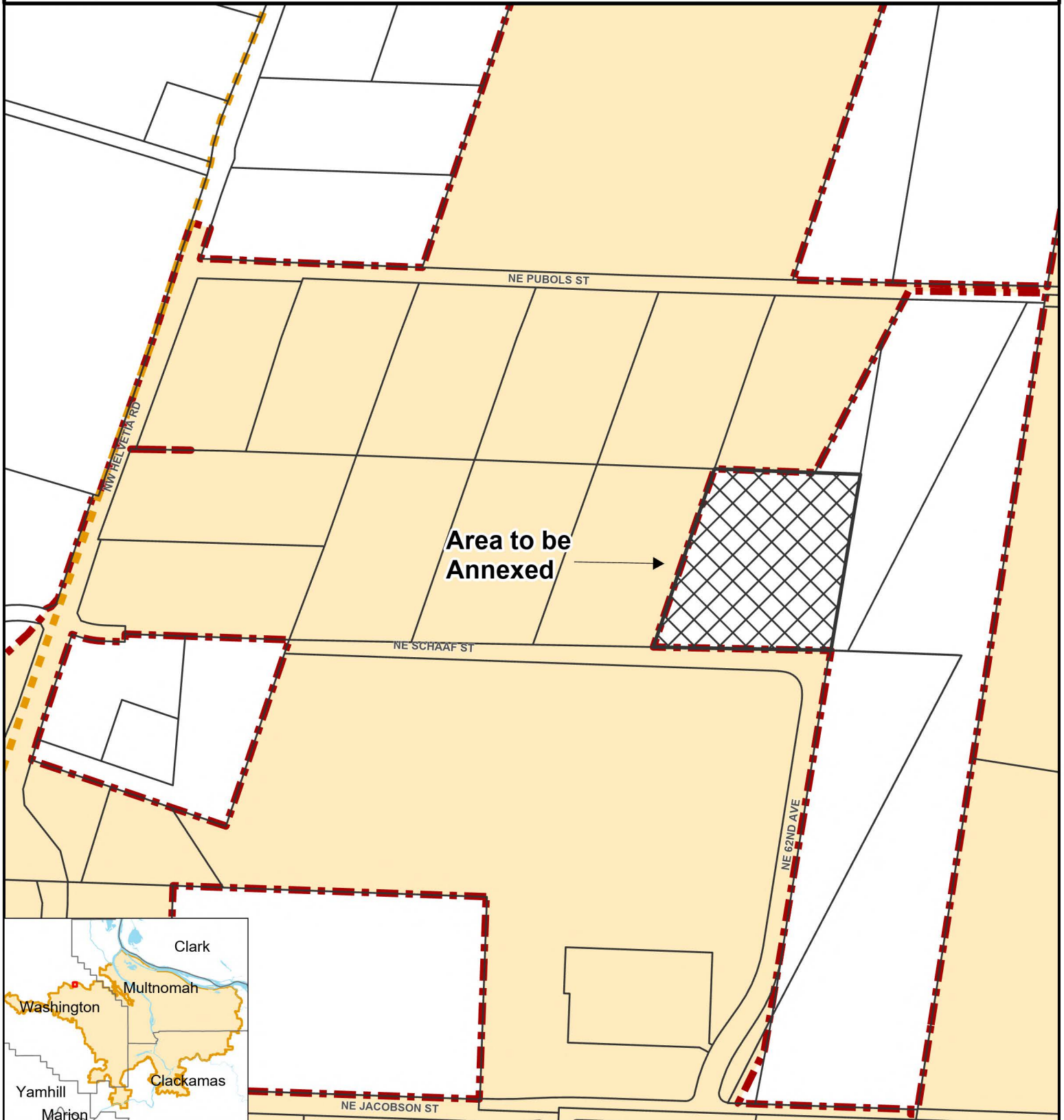1:5,000

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NW HELVETIA RD

NE PUBOLS ST

Area to be Annexed

NE SCHAAF ST

NE 62ND AVE

NE PROGRESS CT

NE CENTURY BLVD

NE PINEFARM CT

NE JACOBSON ST

Clark

Multnomah

Washington

Clackamas

Yamhill

Marion

Metro

Research Center
600 NE Grand Ave
Portland, OR 97232-2736
(503) 797-1742
http://www.oregonmetro.gov/drc

Taxlots

Urban growth boundary

Metro district boundary

Proposal No. AN0524

1:5,000

0   500   1,000 Feet

Proposal No. AN0524

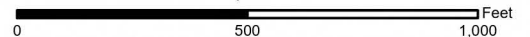1N2W15   **Annexation to the Metro Service District**   Washington County
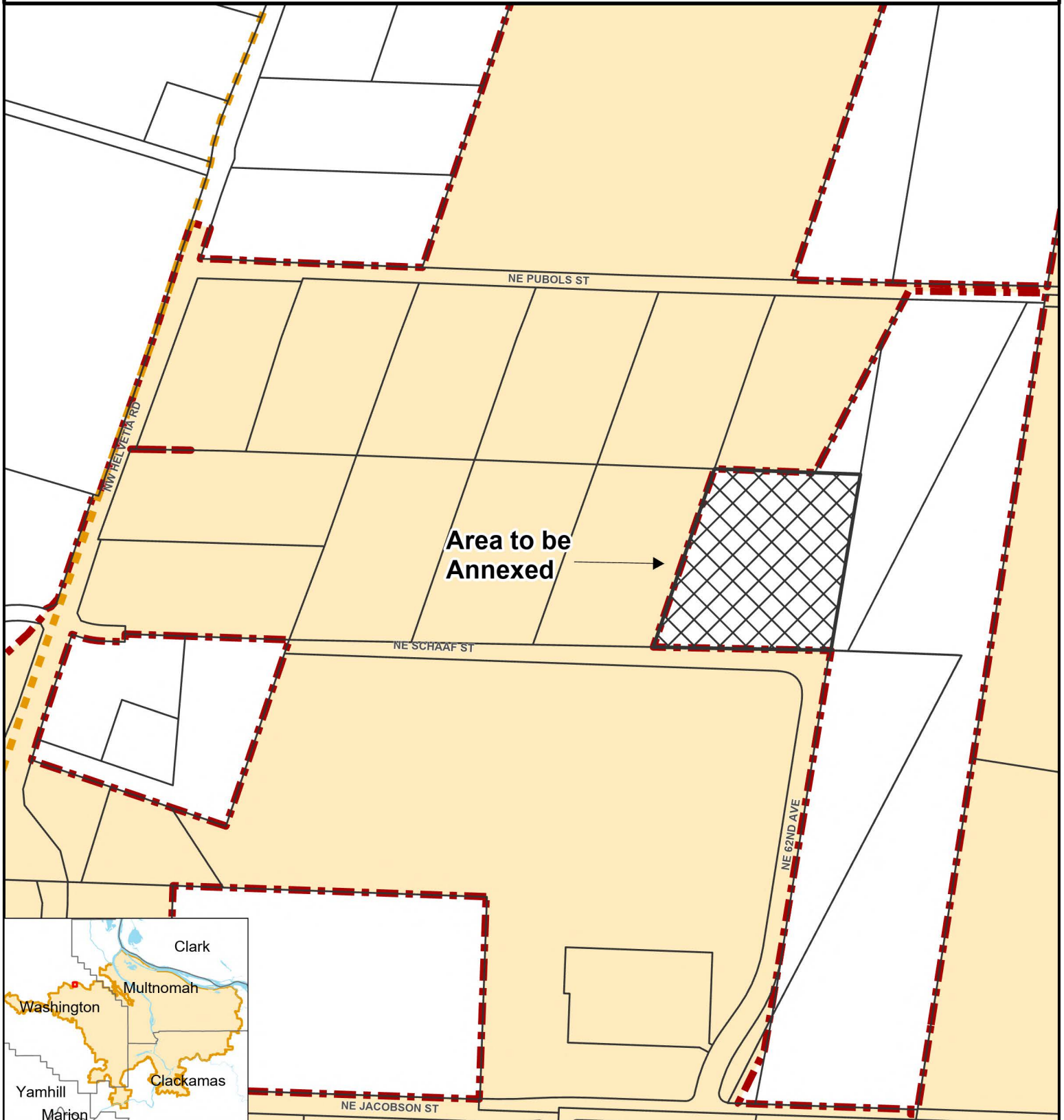
NE PUBOLS ST

NW HELVETIA RD

Area to be Annexed →

NE SCHAAF ST

NE 62ND AVE

Clark

Multnomah

Washington

Yamhill

Clackamas

Marion

NE JACOBSON ST

Metro

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600 NE Grand Ave
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☐ Taxlots

▬ ▬ Urban growth boundary

▬·▬ Metro district boundary

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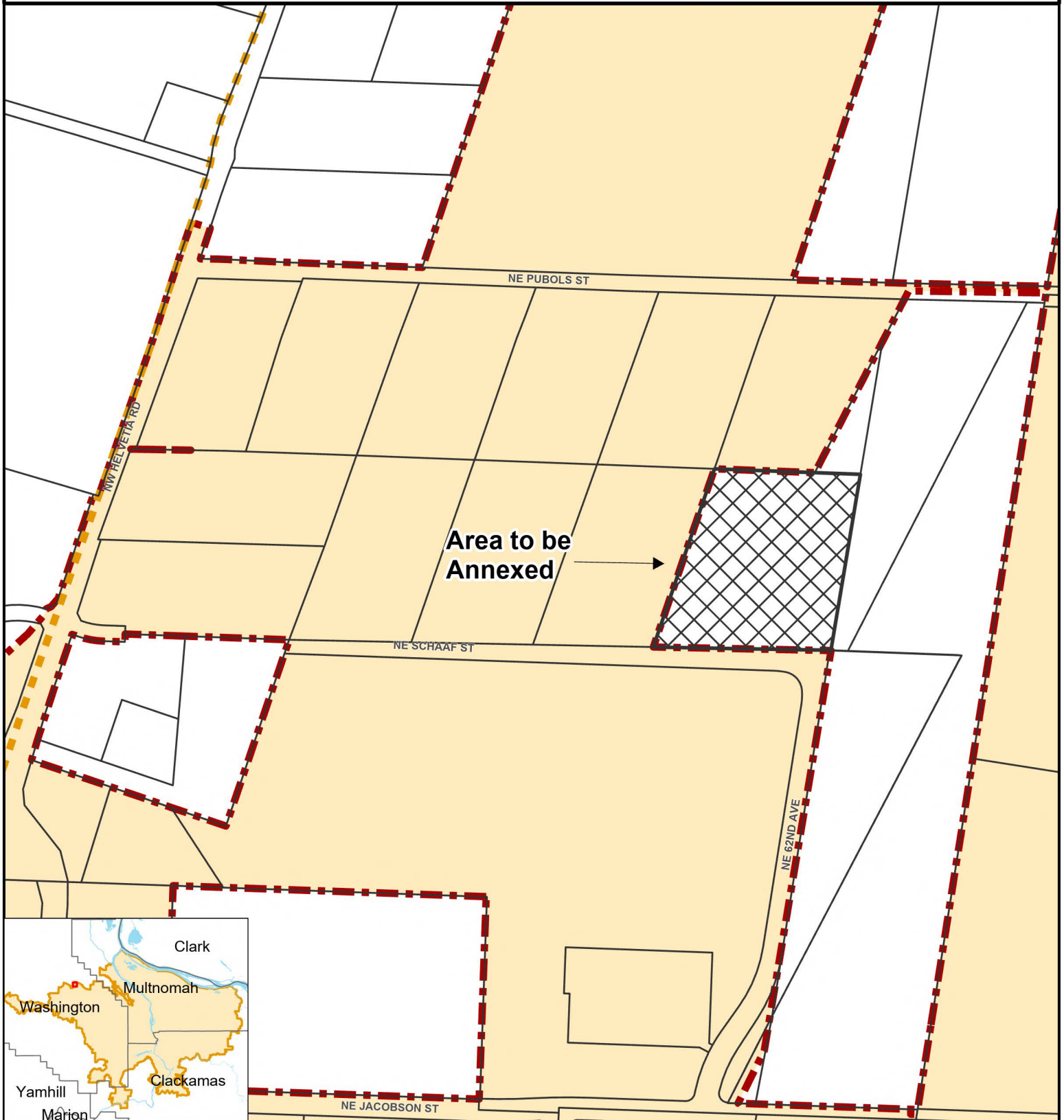0   500   1,000 Feet

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5.1 Supportive Housing Services County
FY24 Quarter Four Reports
Other Business

Metro Council Meeting
Thursday, September 19, 2024

Date: September 3, 2024
Department: Housing
Meeting Date: September 19, 2024

Prepared by: Breanna Hudson,
*Supportive Housing Services Program
Coordinator,*
breanna.hudson@oregonmetro.gov

Presenters:
Yesenia Delgado, *Supportive Housing
Services Manager*
Rachael Lembo*, Finance Manager:
Planning, Development & Research and
Housing*

Length: 30 minutes

ISSUE STATEMENT

Housing department staff will present the Supportive Housing Services (SHS) fourth
quarter reports from Clackamas, Multnomah, and Washington County covering Fiscal Year
2024 from April 1, 2024, through June 30, 2024.

In the fourth quarter, year-to-date data provides a preliminary performance overview for
the entire program year (July 1, 2023 – June 30, 2024). Final numbers will become
available in the Counties' SHS Annual Reports due to Metro on October 31, 2024.

Since SHS programming started in July 2021 through the recent quarter's end on June 30,
2024, funded programs have:
  * Housed over 9,614 people (6,294 households) in permanent supportive housing and
    rapid rehousing programs.
  * Prevented 23,916 people (15,073 households) from eviction or falling into
    homelessness.
  * Expanded and/or sustained shelter capacity by 1,174 beds.

Here are some highlights from quarter four reports submitted by counties to Metro:

  * **Clackamas County** collaboration with The Native American Youth and Family
    Center (NAYA) welcomed the region's first culturally specific shelter to serve
    indigenous families at its grand opening on June 25, 2024. This shelter will provide
    time-limited emergency relief for families experiencing homelessness, working
    toward the goal of moving participants to safe, stable, permanent housing resources.
    Additionally, Mercy Greenbrae, an affordable housing community on the former
    Marylhurst University campus in Lake Oswego, recently opened with 100
    apartments, including 40 reserved for families at risk of or recently experiencing
    homelessness. Mercy Greenbrae was funded by $3 million from the Housing
    Authority of Clackamas County and the Metro Housing Bond, and continuous
    funding through SHS will offer personalized resident services and case management
    to support housing stability and meet individual household needs.

- **Multnomah County's** Regional Long-Term Rent Assistance (RLRA) program, managed by Home Forward, achieved notable successes through cross-departmental partnerships. The Department of County Human Services' Intellectual and Developmental Disabilities (IDD) division significantly increased housing opportunities by introducing 15 RLRA vouchers, successfully placing 13 individuals in housing. The Department of County Justice's new program progressed by utilizing 31 out of 45 tenant-based RLRA vouchers. Additionally, the Health Department expanded its support with 25 new vouchers for individuals with dual diagnoses. These efforts collectively highlight the program's impact on providing stable housing and support for those in need.

- **Washington County** launched its RLRA-Only Program, a rental-assistance-only program for households ready to transition to a lower level of care and indicate that they no longer need supportive case management services. As the program launched in quarter four, 64 households were referred to the RLRA-only program and six were enrolled at the close of the quarter. The Homeless Services Division awarded $10 million for the construction of two new access centers in Tigard and Hillsboro, to provide essential services and support to those at risk of homelessness. These access centers are set to open in 2025 and 2026. Additionally, the County's Eviction Prevention program surpassed its annual goal by serving 1,568 households, well above the target of 500.

During the third year of implementation, the SHS program continued to build capacity to deliver housing services, while advancing the priorities of SHS program. The Counties set quantitative service goals for placements into permanent supportive housing, rapid rehousing, eviction prevention and shelter beds. Clackamas County met all their qualitative work plan goals; Multnomah and Clackamas County each only met two of the four goals for last fiscal year. Metro staff are working with counties to understand the challenges in meeting goals and how to address barriers to success.

In quarter four, counties progressed in geographic expansion goals that extend SHS services into historically underserved regions. Progress is being made in developing a regional housing and homeless services system of care that is accessible, incorporates a variety of service models to meet a diversity of needs and increases the rate critical service delivery that advances the impact of SHS funds to address homelessness across the Metro Region.

Progress towards FY 24 Work Plan Goals

	PSH	RRH	Prevention	Shelter
FY24 Goal	**1,395** households	**935** households	**1,725** households	**460** units
Q4 Outcomes	**277 households**	**489 households**	**598 households**	**262 units**
Progress of FY24 Goal (Q1-Q4)	**1,294** households	**1,370** households	**3,130** households	**960** units
Region-wide Percent Over/Under Goal	**-7.24%**	**46.52%**	**81.45%**	**139.13%**

Financial Update

Revenue: Tax revenue in FY24 totaled $335.8 million ($335.1 million of tax collections plus $700,000 in interest from the tax administrator). Total tax revenue exceeded the FY24 budget figure by $101.7 million, however it is in line with Metro's more recent forecast, which expected revenue to be slightly under the fall 2023 forecast of $356.7 million. FY24 tax collections were slightly below FY23 tax collections ($11.9 million less).

Spending: Each county has seen significant spending growth since the start of the program. Together, the counties spent a combined total of $293.9 million on SHS program costs in Year 3 (July 2023 – June 2024), which is nearly two times more than the $149.2 million spent last year. As programs ramp up, all counties are spending a greater percentage of their annual tax receipts:

- **Clackamas County** spent $54.3 million, nearly three times the prior year amount and 82% of its annual tax receipts.
- **Multnomah County** spent $143.5 million, 1.7 times the prior year amount and 102% of its annual tax receipts.
- **Washington County** spent $96.1 million, twice the prior year amount and 93% of its annual tax receipts.

Time for Council questions and discussion will follow the presentation; however, County staff will not be in attendance or available for questions during the presentation.

ACTION REQUESTED

No Council action requests.

IDENTIFIED POLICY OUTCOMES

Metro Council is strongly aware of the latest implementation progress for the SHS program.

POLICY QUESTION(S)

No policy questions for Council to consider. This presentation is informational.

POLICY OPTIONS FOR COUNCIL TO CONSIDER

There are no policy options for Council to consider; this presentation is informational.

STAFF RECOMMENDATIONS

No staff recommendations.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

Metro's primary role in Supportive Housing Services implementation (SHS) is to provide accountability and oversight of tax revenue, track and evaluate progress towards programmatic goals commitments made to the voters, and to convene and coordinate long-term regional solutions.

Reports are submitted to Metro 45 days after the end of each quarter. Metro staff and the SHS Regional Oversight Committee analyze reports to ensure compliance to the Metro SHS Work Plan and intergovernmental agreements, Local Implementation Plans and each county's Annual Work Plans and budgets. This analysis also provides critical feedback to the counties regarding progress and challenges, and partner to make adjustments that address concerns and improve implementation.

Since SHS programming started in July 2021 through the recent quarter's end on June 30, 2024, funded programs have:

- Housed over 9,614 people (6,294 households) in permanent supportive housing and rapid rehousing programs.
- Prevented 23,916 people (15,073 households) from eviction or falling into homelessness.
- Expanded and/or sustained shelter capacity by 1,174 beds.

Metro presented FY24 quarter four progress to the SHS Regional Oversight Committee on Monday, August 26, 2024, and will present quarter four financials to the SHS Regional Oversight Committee on September 23, 2024.

BACKGROUND

Approval of Measure 26-210 created new tax revenue that funds a regional system of care governed by four jurisdictions: Metro Regional Government and Clackamas, Multnomah and Washington counties. The tax took effect in January 2021 and will expire in 2031 unless reauthorized by voters.

In December 2020, the Metro Council adopted a SHS Work Plan to guide implementation. The Work Plan defines the fund's guiding principles, racial equity goals, priority populations, service areas, accountability structures and funding allocations.

Within the framework of the regional Work Plan, each county's specific SHS investments and activities are guided by local implementation plans informed by community engagement and approved by Metro Council in spring 2021.

SHS implementation is guided by the following regionally established principles:

- Strive toward stable housing for all
- Lead with racial equity and work toward racial justice
- Fund proven solutions
- Leverage existing capacity and resources
- Innovate: evolve systems to improve
- Demonstrate outcomes and impact with stable housing solutions
- Ensure transparent oversight and accountability
- Center people with lived experience, meet them where they are, and support their self-determination and well-being
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity

Since the measure's passage, Metro Council has taken the following actions to direct implementation of the program:

- Creation and appointment of the **SHS Regional Oversight Committee**, to provide program oversight on behalf of the Metro Council;
- Approval of the **SHS Work Plan**, which provides an operational framework for the program;
- Approval of **local implementation plans** for all three of Metro's local implementation partners, as part of **intergovernmental agreements** which lay out the terms and conditions upon which Metro will disburse tax funds to local implementation partners; and
- Creation and appointment of the **Tri-County Planning Body** to strengthen coordination and alignment of program implementation across the Metro region. Review and approve recommendations presented by the **SHS Regional Oversight Committee** in the FY21-22 and FY22-23 annual regional reports.

ATTACHMENTS

    A) Clackamas County FY24 Q4 SHS report
    B) Multnomah County FY24 Q4 SHS report
    C) Washington County FY24 Q4 SHS report

[For work session:]
- Is legislation required for Council action? **No**
- If yes, is draft legislation attached? **No**
- What other materials are you presenting today? **None**

SUPPORTIVE HOUSING SERVICES QUARTERLY REPORT

SUBMITTED BY (COUNTY): CLACKAMAS

FISCAL YEAR: 2023-2024

QUARTER: FOURTH

SUPPORTIVE HOUSING SERVICES

QUARTERLY REPORT TEMPLATE DRAFT

*The following information should be submitted **45 calendar days after the end of each quarter**, per IGA requirements. When that day falls on a weekend, reports are due the following Monday.*

	Q1	Q2	Q3	Q4
Report Due	Nov 15	Feb 15	May 15	Aug 15
Reporting Period	Jul 1 – Sep 30	Oct 1 – Dec 31	Jan 1 – Mar 31	Apr 1 – Jun 30

Please do not change the formatting of margins, fonts, alignment, or section titles.

Section 1. Progress narrative

Executive Summary

This quarter marks the close of Clackamas County's third year of SHS programming. The County has fully launched and integrated a continuum of homeless services systems into our community, ultimately preventing homelessness for over 3,000 people and placing more than 2,000 people into housing in three years. Outcomes track with year-over-year spending, increasing from $3.4M in the first fiscal year to $18.4M in the second and over $46M this past fiscal year; the final financial report will be released with the annual report.

This fiscal year, Clackamas County exceeded all quantitative housing goals delineated in its annual work plan. SHS funds prevented homelessness for 1,228 households, surpassing the County's goal of 625 households. One hundred ninety-six households were placed into rapid rehousing this fiscal year, once again surpassing the County's goal of 120 rapid rehousing placements. The County placed 412 households into permanent supportive housing, also exceeding its goal to serve 405 households. Additionally, 210 shelter units have been created and sustained, exceeding the County's goal of 155 units.

Highlights from this past quarter span the continuum of services, from coordinated entry through stabilization and retention.

Coordinated Entry: CHA Hotline

This quarter, Clackamas County's coordinated entry system, the Coordinated Housing Access (CHA) Hotline, was recognized with a 2024 Achievement Award from the National Association of Counties (NACo). The NACo Achievement Awards Program recognizes innovative county government programs, which are judged on innovation and creativity, measurable results and effectiveness, and enhanced level of citizen participation in, or the understanding of, government programs. The CHA Hotline connects people in a housing crisis with a trained, compassionate assessor who listens intently to their story, pinpointing immediate needs while drawing upon local resources to find the right program fit. The CHA assessment is finely tuned to match people with the precise level of support they require. Someone experiencing recent homelessness might find themselves directed towards a rapid rehousing program for short-term assistance. A long-term resident of the streets may be steered towards a permanent supportive housing solution. People are also guided to problem-solve and may receive other social services referrals including to physical and mental health programs. CHA has conducted 27,366 housing assessments in three years. As part of Clackamas County's housing services programs, CHA has contributed to a 65% decrease in homelessness from 2019 to 2023, during a period when homelessness increased nationally.

The Coordinated Housing Access hotline continues to make improvements and build on its success. This quarter, staff launched a CHA Core Team for individuals with lived experience and direct service providers to give input and help drive changes to improve our CHA system. Through a recruitment process, 11 individuals were selected to be part of this group, 8 of whom have experienced literal homelessness, and 4 of whom have themselves gone through the CHA system in Clackamas County in the last 3 years. 5 of these individuals (45%) are BIPOC. Compensation is provided to individuals with lived experience who are not being paid by an agency for their time. The CHA Core Team had 3 meetings this quarter and will continue to meet quarterly. Meetings have focused on establishing the group and relationship building as well as looking at assessment improvements, identifying future areas of improvement like prioritization, and discussing access and how to improve communication with clients.

Other continuous improvement efforts include streamlining the referral process, with changes effective in the first quarter of FY25. Roles of CHA staff and providers are being clarified to set clear expectations for outreach to clients and to use HMIS to its fullest capacity. The goal of these efforts is to reduce the time between the CHA assessment and referral, as well as the time between the referral and housing placement.

The CHA team is also working in concert with various other groups within the County to coordinate service systems. Collaborations include the health and housing integration team to prepare for the

Medicaid 1115 Demonstration Waiver; coordination between the CHA call team and the Resource Navigation team to stay apprised of ever-changing resources and update pathways to housing for participants; and jointly supporting participant needs with the County's Mental Health Crisis and Support Line and their Mobile Response Team. External collaborations include a pilot project with Unite Us to coordinate closed loop referrals and working with local libraries to help unsheltered library visitors.

Safety on and off the Street: kʰwat yaka haws

The Native American Youth and Family Center (NAYA) welcomed the region's first culturally specific shelter to serve indigenous families at its grand opening on June 25, 2024. kʰwat yaka haws, meaning *Auntie's Place* in the Chinook Wawa language, will provide time-limited emergency shelter for families experiencing homelessness, working toward the goal of moving participants to safe, stable, permanent housing resources. The shelter offers culturally specific services like first foods cooking classes, as well as supportive services such as substance use counseling, peer support and mental health support, and direct pathways to permanent housing.

Located in Milwaukie and sitting on a larger campus owned by Northwest Housing Alternatives, kʰwat yaka haws will serve no less than 56 households annually. Each of the eight shelter units contains a bathroom and kitchenette and can accommodate families of up to seven people with at least one child under the age of eighteen. Common spaces and hallways feature murals and other works by local Indigenous artists. There is also a community kitchen, laundry facilities, and a playground. Referrals to the shelter will be made through NAYA and the CHA Hotline, and families began to move in in Q1 of FY25. kʰwat yaka haws is open 24/7, with a shelter advocate on site.

Photo Credit: Aislin Tweedy, Underscore Native News

NAYA is a non-profit organization that provides culturally specific service to the Native community with the mission to enhance the diverse strengths of Native American youth and families through cultural identity and education. For many decades, NAYA has served Native Americans with social services such as housing navigation, food, energy, domestic violence resources, rental assistance, and a culturally specific high school. NAYA recently created a new Housing and Stabilization Services Department, which oversees their shelter operations.

Permanent Housing: Mercy Greenbrae

Nestled among the trees on the east end of the former Marylhurst University campus in Lake Oswego is the newly opened Mercy Greenbrae community. The 100 affordable one-, two-, and three-bedroom apartments will become homes to families with less than 60% of the Area Median Income. Forty units are designated for households recently or at risk of homelessness. While the grand opening occurred on July 16th, leasing and planning work was well underway in Q4 of FY24.

Founded by the Sisters of the Holy Names of Jesus and Mary in 1893, Marylhurst closed its doors over a hundred years later in 2018. In line with their core value of community service, the Sisters pivoted to affordable housing and established a partnership with Mercy Housing. Today, the Sisters and Mercy Housing are in partnership with the Lake Oswego School District, the City of Lake Oswego, and the Mercy Scholars program to enhance child and student success at the reimagined development. Mercy Greenbrae's amenities include play spaces, a technology center, plentiful walking trails around the picturesque campus, community garden plots, and Out of School Time programming.

Mercy Greenbrae also gained local attention during construction for sustainability practices and energy efficiency. Units are equipped with energy star appliances, as well as centralized air filtration.

Fulfilling a critical need for affordable family housing in Lake Oswego, Mercy Greenbrae received $3M in funding from the Housing Authority of Clackamas County utilizing the Metro Housing Bond. Ongoing funding through Supportive Housing Services will provide resident services and case management, with services and resources tailored to individual household goals and in support of housing stability and retention.

Housing Retention and Self-sufficiency

This quarter Program Team staff initiated a partnership with Clackamas County Workforce and the workforce program in the County's Children, Family, and Community Connections (CFCC) Division to help case managers and housing navigators familiarize with the programs and processes to connect housed participants to employment services. Staff are also meeting with partners to identify additional methods to address barriers to employment, such as extended time outside the workforce. These collaborations are intended to equip case managers with the tools to help participants voluntarily graduate from Supportive Housing Case Management if they are able and ready to enter or re-enter the workforce. Case managers follow a graduation protocol to identify households who are managing their finances independently, have attained housing stability, and are voluntarily choosing to graduate from Supportive Housing Case Management services.

Additionally, CFCC's STEP (Training and Employment Program for individuals who have experienced homelessness or at risk of homelessness and who are receiving Supplemental Nutrition Assistance Program or SNAP food benefits) provides employment and training services to participants housed through RLRA and other SHS programs. In addition to individual career counseling, resume preparation, job placement, and work skills training, the program provides co-case management with Supportive Housing Case Management.

Housing case managers on the County's Behavioral Health team also offer individual and group skills training to teach and encourage self-sufficiency, including health and wellness, dialectical behavioral therapy (DBT), and employment and education essentials. The team is currently developing a "DBT in the Workplace" group, as well. As staff have observed significant crossover and interconnection between housing and employment needs for their clients, the Behavioral Health team also collaborates with tri-county providers, partners, and businesses on the Supportive Employment Advisory Council.

At Renaissance Court Apartments in Wilsonville, a peer support program funded by SHS empowers residents to advocate for their individual needs and build community. Thus far the program has assisted residents with various needs supporting housing retention and self-sufficiency including reinstating utility service, obtaining a smartphone, obtaining a walker, obtaining a wheelchair, setting up food box deliveries, promoting positive neighbor-to-neighbor interactions, donating unneeded household items to Goodwill, and increased comfortability in engaging with property management.

Resident services at the Housing Authority of Clackamas County (HACC) launched their first homeownership program in January, enrolling 25 families into Home $avings. Each family receives $350 per month in savings over a 24-month period to go toward the purchase of a home. HACC staff are partnering with agencies to access the Community Land Trust model, which makes homeownership more affordable. As families take major steps toward becoming mortgage ready, some early successes of Home $avings include completion of financial education, homebuyer education, debt forgiven, paid down, or discharged, refinancing auto loans at a lower interest rate, pre-qualifications for home loans, and increased income through work for multiple families.

Individual programs have developed these pathways to self-sufficiency by tailoring resources to the needs of their housed participants. In FY25, as the County focuses on optimizing its systems through contract performance monitoring, one key metric will be the number of households that successfully maintain their housing and increase their household income through initiatives such as benefit enrollment or workforce development.

Youth Housing Advancements

In Q4, three workgroups were established to advance partnerships and goals for the Youth Housing Continuum.

The youth housing data workgroup, facilitated in partnership with Northwest Family Services and AntFarm, is developing a survey to collect feedback from youth housing program participants. The data workgroup is also working to raise awareness of the 2025 Point In Time Count among providers, youth with lived experience, and youth actively experiencing homelessness.

The youth housing equity workgroup, facilitated in partnership with young adults with lived experience of homelessness, is working on ways to assess the County's Youth Housing Continuum and its ability to serve specific populations, including LGBTQIA+ youth, youth of color, minors, youth with mental health and/or substance abuse challenges, youth in foster care, youth with juvenile system involvement, pregnant and parenting youth, and youth survivors of trafficking and/or sexual exploitation.

The youth housing innovation workgroup, facilitated in partnership with Second Home, is creating a resource handbook for youth housing rights and legal protections.

Youth Engagement Training

In addition to these workgroups, the County's Youth Advisory Board is engaging with the County's strategic plan work, providing insight and recommendations. The Youth Advisory Board also delivered a Youth Engagement Presentation, shared recently with the County's Health, Housing, and Human Services executive leadership team. The training empowered the Youth Advisory Board to learn to communicate their needs professionally and hold space with adult partners effectively.

Section 2. Data and data disaggregation

Please use the following table to provide and disaggregate data on Population A, Population B housing placement outcomes and homelessness prevention outcomes. Please use your local methodologies for tracking and reporting on Populations A and B. You can provide context for the data you provided in the context narrative below.

Data disclaimer:

HUD Universal Data Elements data categories will be used in this template for gender identity and race/ethnicity until county data teams develop regionally approved data categories that more accurately reflect the individual identities.

Section 2.A Housing Stability Outcomes: Placements & Preventions

Housing Placements By Intervention Type: Supportive Housing

# housing placements – supportive housing*	This Quarter		Year to Date	
	#	%	#	%
Total people	171		775	
Total households	96		412	
Race & Ethnicity				
Asian or Asian American	1	0.6%	17	2.2%
Black, African American or African	22	12.9%	94	12.1%
Hispanic or Latin(a)(o)(x)	41	24.0%	147	19.0%
American Indian, Alaska Native or Indigenous	9	5.3%	37	4.8%
Native Hawaiian or Pacific Islander	7	4.1%	28	3.6%
White	127	74.3%	511	65.9%
Non-Hispanic White (subset of White category)	86	50.3%	383	49.4%
Client Doesn't Know	--	--	--	--
Client Refused	--	--	--	--
Data Not Collected	11	6.4%	16	2.1%
Disability status[1]				
	#	%	#	%
Persons with disabilities	75	43.9%	324	41.8%
Persons without disabilities	21	12.3%	99	12.8%
Disability unreported	11	6.4%	17	2.2%

[1] Disability information for Q4 is not provided for every person served due to limited data availability.

Gender identity[2]				
	#	%	#	%
Male	36	21.1%	156	20.1%
Female	60	35.1%	272	35.1%
A gender that is not singularly 'Male' or 'Female'	--	--	--	--
Transgender	--	--	--	--
Questioning	--	--	--	--
Client doesn't know	--	--	--	--
Client refused	--	--	--	--
Data not collected	11	6.4%	12	1.5%

Supportive housing = permanent supportive housing and other service-enriched housing for Population A such as transitional recovery housing

Housing Placements By Intervention Type: Rapid Re-Housing & Short-term Rent Assistance

# housing placements – RRH**	This Quarter		Year to Date	
	#	%	#	%
Total people	69		472	
Total households	29		196	
Race & Ethnicity				
Asian or Asian American	--	--	5	1.1%
Black, African American or African	16	23.2%	48	10.2%
Hispanic or Latin(a)(o)(x)	19	27.5%	141	29.9%
American Indian, Alaska Native or Indigenous	6	8.7%	26	5.5%
Native Hawaiian or Pacific Islander	--	--	27	5.7%
White	42	60.9%	302	64.0%
Non-Hispanic White (subset of White category)	23	33.3%	220	46.6%
Client Doesn't Know	--	--	--	--
Client Refused	--	--	1	0.2%
Data Not Collected	--	--	19	4.0%
Disability status				
	#	%	#	%
Persons with disabilities	36	52.2%	228	48.3%
Persons without disabilities	31	44.9%	217	46.0%
Disability unreported	2	2.9%	27	5.7%
Gender identity				
	#	%	#	%
Male	24	34.8%	128	27.1%

---

[2] Gender information for Q4 is not provided for every person served due to limited data availability.

Female	44	63.8%	337	71.4%
A gender that is not singularly 'Male' or 'Female'	1	1.4%	2	0.4%
Transgender	--	--	--	--
Questioning	--	--	1	0.2%
Client doesn't know	--	--	--	--
Client refused	--	--	--	--
Data not collected	--	--	4	0.8%

*** RRH = rapid re-housing or short-term rent assistance programs*

Housing Placements By Intervention Type: Other Permanent Housing Programs (if applicable)

If your county does not have Other Permanent Housing, please write N/A:

N/A.

**** OPH = other permanent housing programs (homeless preference units, rent assistance programs without services) that your system operates and SHS funds*

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on Housing Placements.

N/A.

Eviction and Homelessness Prevention

# of preventions	This Quarter		Year to Date	
	#	%	#	%
Total people	797		2,679	
Total households	431		1,228	
Race & Ethnicity				
Asian or Asian American	12	1.5%	30	1.1%
Black, African American or African	80	10.0%	293	10.9%
Hispanic or Latin(a)(o)(x)	146	18.3%	519	19.4%
American Indian, Alaska Native or Indigenous	25	3.1%	76	2.8%
Native Hawaiian or Pacific Islander	9	1.1%	68	2.5%
White	602	75.5%	1,973	73.6%
Non-Hispanic White (subset of White category)	328	41.2%	1,053	39.3%
Client Doesn't Know	3	0.4%	17	0.6%
Client Refused	11	1.4%	31	1.2%
Data Not Collected	22	2.8%	25	0.9%

Disability status				
	#	%	#	%
Persons with disabilities	265	33.2%	849	31.7%
Persons without disabilities	521	65.4%	1,815	67.7%
Disability unreported	11	1.4%	15	0.6%
Gender identity				
	#	%	#	%
Male	332	41.7%	1,079	40.3%
Female	435	54.6%	1,564	58.4%
A gender that is not singularly 'Male' or 'Female'	3	0.4%	6	0.2%
Transgender	1	0.1%	3	0.1%
Questioning	--	--	--	--
Client doesn't know	--	--	--	--
Client refused	6	0.8%	6	0.2%
Data not collected	20	2.5%	21	0.8%

Section 2.B Regional Long-Term Rent Assistance Program
The following data represents a subset of the above Housing Placements data. The Regional Long-term Rent Assistance Program (RLRA) primarily provides permanent supportive housing to SHS priority Population A clients (though RLRA is not strictly limited to PSH or Population A).

RLRA data is not additive to the data above. Housing placements shown below are duplicates of the placements shown in the data above.

*Please disaggregate data for the **number of people in housing using an RLRA voucher** during the quarter and year to date. Q*

Regional Long-term Rent Assistance Quarterly Program Data	This Quarter		Year to Date	
	#	%	#	%
Number of RLRA vouchers issued during reporting period	79		370	
Number of people newly leased up during reporting period	119		703	
Number of households newly leased up during reporting period	55		358	
Number of people in housing using an RLRA voucher during reporting period	1,325		1,382	
Number of households in housing using an RLRA voucher during reporting period	727		766	

Race & Ethnicity[3]				
Asian or Asian American	25	1.2%	28	1.4%
Black, African American or African	225	12.4%	230	12.0%
Hispanic or Latin(a)(o)(x)	245	13.2%	247	12.7%
American Indian, Alaska Native or Indigenous	75	5.5%	75	5.2%
Native Hawaiian or Pacific Islander	39	2.2%	39	2.1%
White	1,021	82.0%	1,074	82.6%
Non-Hispanic White (subset of White category)	745	67.7%	792	68.7%
Client Doesn't Know	--	--	--	--
Client Refused	25	1.2%	28	1.4%
Data Not Collected	225	12.4%	230	12.0%
Disability status[4]				
	#	%	#	%
Persons with disabilities	580	79.8%	612	79.9%
Persons without disabilities	147	20.2%	154	20.1%
Disability unreported	--	--	--	--
Gender identity[5]				
	#	%	#	%
Male	296	40.7%	314	41.0%
Female	427	58.7%	448	58.5%
A gender that is not singularly 'Male' or 'Female'	2	0.3%	2	0.3%
Transgender	--	--	--	--
Questioning	--	--	--	--
Client doesn't know	1	0.1%	1	0.1%
Client refused	2	0.3%	2	0.3%
Data not collected	1	0.1%	1	0.1%

Definitions:

Number of RLRA vouchers issued during reporting period: Number of households who were issued an RLRA voucher during the reporting period. (Includes households still shopping for a unit and not yet leased up.)

Number of households/people newly leased up during reporting period: Number of households/people who completed the lease up process and moved into their housing during the reporting period.

Number of households/people in housing using an RLRA voucher during reporting period: Number of households/people who were in housing using an RLRA voucher at any point during the reporting period. (Includes

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[3] Race and ethnicity data provided at head of household level.
[4] Disability status available for the heads of households.

[5] Gender data reported at head of household level only due to availability of data.

(a) everyone who has been housed to date with RLRA and is still housed, and (b) households who became newly housed during the reporting period.)

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on the RLRA program.

N/A.

Section 2.C Subset of Housing Placements and Preventions: Priority Population Disaggregation

The following is a **subset** of the above Housing Placements and Preventions data (all intervention types combined), which represents housing placements/preventions for SHS priority population A.

Population A Report	This Quarter		Year to Date	
	#	%	#	%
Population A: Total **people** placed into permanent housing/preventions	160		842	
Population A: Total **households** placed into permanent housing/preventions	91		453	
Race & Ethnicity				
Asian or Asian American	1	0.6%	20	2.4%
Black, African American or African	29	18.1%	108	12.8%
Hispanic or Latin(a)(o)(x)	41	25.6%	198	23.5%
American Indian, Alaska Native or Indigenous	8	5.0%	36	4.3%
Native Hawaiian or Pacific Islander	4	2.5%	40	4.8%
White	110	68.8%	572	67.9%
(Subset of White): Non-Hispanic White	69	43.1%	425	50.5%
Client Doesn't Know	--	--	--	--
Client Refused	--	--	1	0.1%
Data Not Collected	7	4.4%	21	2.5%
Disability status[6]				
	#	%	#	%
Persons with disabilities	77	48.1%	406	48.2%
Persons without disabilities	36	22.5%	212	25.2%

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[6] Disability status values will not sum to 100% of total Population A people served due to limited data availability.

	#	%	#	%
Disability unreported	8	5.0%	31	3.7%
Gender identity[7]				
	#	%	#	%
Male	42	26.3%	197	23.4%
Female	70	43.8%	435	51.7%
A gender that is not singularly 'Male' or 'Female'	1	0.6%	2	0.2%
Transgender	--	--	--	--
Questioning	--	--	2	0.2%
Client doesn't know	--	--	--	--
Client refused	--	--	--	--
Data not collected	7	4.4%	11	1.3%

The following is a **subset** of the above Housing Placements and Preventions data (all intervention types combined), which represents housing placements and preventions for SHS priority population B.

Population B Report	This Quarter		Year to Date	
	#	%	#	%
Population B: Total **people** placed into permanent housing/preventions	877		3,091	
Population B: Total **households** placed into permanent housing/preventions	465		1,390	
Race & Ethnicity				
Asian or Asian American	12	1.4%	32	1.0%
Black, African American or African	89	10.1%	329	10.6%
Hispanic or Latin(a)(o)(x)	165	18.8%	617	20.0%
American Indian, Alaska Native or Indigenous	32	3.6%	103	3.3%
Native Hawaiian or Pacific Islander	12	1.4%	83	2.7%
White	661	75.4%	2,237	72.4%
(Subset of White): Non-Hispanic White	368	42.0%	1,253	40.5%
Client Doesn't Know	3	0.3%	17	0.5%
Client Refused	11	1.3%	31	1.0%
Data Not Collected	26	3.0%	39	1.3%
Disability status[8]				
	#	%	#	%
Persons with disabilities	299	34.1%	1,002	32.4%
Persons without disabilities	537	61.2%	1,938	62.7%

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[7] Gender data for Q4 reported at head of household level for some services due to reporting discrepancies.
[8] Disability status values will not sum to 100% of total Population B people served due to limited data availability.

Disability unreported	16	1.8%	32	1.0%
Gender identity[9]				
	#	%	#	%
Male	350	39.9%	1,181	38.2%
Female	469	53.5%	1,752	56.7%
A gender that is not singularly 'Male' or 'Female'	3	0.3%	6	0.2%
Transgender	1	0.1%	3	0.1%
Questioning	--	--	--	--
Client doesn't know	--	--	--	--
Client refused	6	0.7%	6	1.0%
Data not collected	24	2.7%	26	0.8%

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on Population A/B.

N/A.

Section 2.D Other Data: Non-Housing Numeric Goals

This section shows progress to quantitative goals set in county annual work plans. Housing placement and prevention progress are already included in the above tables. This section includes goals such as shelter beds and outreach contacts and other quantitative goals that should be reported on a quarterly basis. This data in this section may differ county to county, and will differ year to year, as it aligns with goals set in county annual work plans.

 Instructions: Please complete the tables below, as applicable to your annual work plans:

All counties please complete the table below:

Goal Type	Your FY 22-23 Goal	Progress this Quarter	Progress YTD
Total Supported Shelter Units	155	49	210

If applicable for quarterly reporting, other goals from your work plan, if applicable (e.g. people served in outreach, other quantitative goals)

Not applicable.

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[9] Gender data for Q4 reported at head of household level for some services due to reporting discrepancies.

Section 3. Financial reporting

Please complete the quarterly financial report and include the completed financial report to this quarterly report, as an attachment.

Metro Supportive Housing Services
Financial Report for Quarterly Progress Report (IGA 7.1.2) and Annual Program Report (IGA 7.1.1)

Financial Report (by Program Category) COMPLETE THE SECTION BELOW EVERY QUARTER. UPDATE AS NEEDED FOR THE ANNUAL REPORT.

	Annual Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	Total YTD Actuals	Variance Under / (Over)	% of Budget	Comments
Metro SHS Resources									
Beginning Fund Balance	58,623,269	92,701,597				92,701,597	(34,078,328)	158%	*Counties will provide details and context on any unbudgeted amounts in Beginning Fund Balance in the narrative of their report, including the current plan and timeline for budgeting and spending it.*
Metro SHS Program Funds	45,275,392	3,685,104	15,453,043	12,288,233	34,661,280	66,087,660	(20,812,268)	146%	
Interest Earnings	100,000	640,090	867,267	615,679	1,089,870	3,212,906	(3,112,906)	3213%	
insert addt'l lines as necessary						-	-	N/A	
Total Metro SHS Resources	103,998,661	97,026,791	16,320,310	12,903,913	35,751,150	162,002,163	(58,003,502)	156%	
Metro SHS Requirements									
Program Costs									
Activity Costs									
Shelter, Outreach and Safety on/off the Street (emergency shelter, outreach services and supplies, hygiene programs)	11,494,940	655,282	2,474,097	1,798,122	3,966,825	8,894,326	2,600,614	77%	Mobile and site-based outreach services, some of which are culturally specific. Non-congregate site-based and scattered site shelters. Includes some specialized shelters serving families, DV survivors, and Latinx populations.
Short-term Housing Assistance (rent assistance and services, e.g. rapid rehousing, short-term rent assistance, housing retention)	9,192,365	1,359,601	1,317,492	2,281,031	2,672,464	7,630,588	1,561,777	83%	Short-term rent assistance administered by service providers and the county, resident services for affordable housing developments, eviction prevention for Housing Authority owned/managed properties, and rapid rehousing for both adults and youth.
Permanent supportive housing services (wrap-around services for PSH)	11,191,087	318,238	1,956,756	1,802,905	5,315,519	9,393,417	1,797,669	84%	Housing navigation/placement and supportive housing case management services for moving households into PSH and ensuring they remain stably housed. Includes several culturally specific providers.
Long-term Rent Assistance (RLRA, the rent assistance portion of PSH)	11,773,632	2,419,149	2,926,073	3,275,817	4,526,645	13,147,684	(1,374,052)	112%	All non-administrative costs for the RLRA program which include rental and utility payment assistance, personnel, and other miscellaneous program operation expenses.
Systems Infrastructure (service provider capacity building and organizational health, system development, etc)	2,748,154	784,986	1,050,767	904,174	1,834,764	4,574,691	(1,826,537)	166%	Capacity building for service providers with an emphasis on grassroots and culturally specific organizations, technical assistance for service providers, HMIS and coordinated housing access personnel and infrastructure support.
Built Infrastructure (property purchases, capital improvement projects, etc)	12,250,000	6,900	4,359,563	875,528	195,433	5,437,423	6,812,577	44%	Investments into the construction and improvement of new shelter and a site to support the coordination and delivery of all housing services.
Other supportive services (employment, benefits)	611,797	39,952	29,097	27,551	517,427	614,027	(2,230)	100%	Social security benefits recovery and case managers assisting housing insecure households who require significant behavioral health support.
SHS Program Operations	1,164,395	159,563	211,206	225,197	530,064	1,126,031	38,364	97%	Personnel who directly support contracted service providers via training and technical assistance and miscellaneous operating costs that support service delivery.
Carryover Balance	20,126,982								Includes $20,126,982 beginning fund balance (carryover) planned to support limited-term investments in the carryover plan for years beyond FY 2023-24.
Subtotal Activity Costs	60,426,369	5,743,671	14,325,052	11,190,325	19,559,140	50,818,188	9,608,181	84%	
Administrative Costs [1]									*Service Provider Administrative Costs are reported as part of Program Costs above. Counties will provide details and context for Service Provider Administrative Costs within the narrative of their Annual Program Report.*
County Admin: Long-term Rent Assistance	1,308,181	102,053	116,445	146,088	192,567	557,152	751,029	43%	Administrative Costs for long-term rent assistance equals 4% of Partner's YTD expenses on long-term rent assistance.
County Admin: Other	4,222,379	307,524	488,518	457,647	1,537,662	2,791,351	1,431,028	66%	Administrative Costs for Other Program Costs equals 7% of total YTD Other Program Costs.
Subtotal Administrative Costs	5,530,560	409,577	604,963	603,735	1,730,229	3,348,504	2,182,057	61%	
Other Costs									
Regional Strategy Implementation Fund [2]	6,595,902	-	24,401	6,189	107,684	138,274	6,457,628	2%	
insert addt'l lines as necessary						-	-	N/A	
Subtotal Other Costs	6,595,902	-	24,401	6,189	107,684	138,274	6,457,628	2%	
Subtotal Program Costs	72,552,831	6,153,248	14,954,416	11,800,249	21,397,052	54,304,966	18,247,866	75%	
Contingency [3]	2,263,770					-	2,263,770	0%	
Stabilization Reserve [4]	9,055,078					-	9,055,078	0%	
Regional Strategy Impl Fund Reserve [2]	-					-	-	N/A	
RLRA Reserves						-	-	N/A	
Other Programmatic Reserves						-	-	N/A	
insert addt'l lines as necessary						-	-	N/A	
Subtotal Contingency and Reserves	11,318,848	-	-	-	-	-	11,318,848	0%	
Total Metro SHS Requirements	83,871,679	6,153,248	14,954,416	11,800,249	21,397,052	54,304,966	29,566,714	65%	
Ending Fund Balance	20,126,982	90,873,543	1,365,894	1,103,664	14,354,098	107,697,198	(87,570,216)		

[1] Per IGA Section 3.4.2 ADMINISTRATIVE COSTS, Metro recommends, but does not require, that in a given Fiscal Year Administrative Costs for SHS should not exceed 5% of annual Program Funds allocated to Partner; and that Administrative Costs for administering long-term rent assistance programs should not exceed 10% of annual Program Funds allocated by Partner for long-term rent assistance.

[2] Per IGA Section 8.3.3 REGIONAL STRATEGY IMPLEMENTATION FUND, each County must contribute not less than 5% of its share of Program Funds each Fiscal Year to a Regional Strategy Implementation Fund to achieve regional investment strategies.

[3] Per IGA Section 5.5.4 CONTINGENCY, partner may establish a contingency account in addition to a Stabilization Reserve. The contingency account will not exceed 5% of Budgeted Program Funds in a given Fiscal Year.

[4] Per IGA Section 5.5.3 PARTNER STABILIZATION RESERVE, partner will establish and hold a Stabilization Reserve to protect against financial instability within the SHS program with a target minimum reserve level will be equal to 10% of Partner's Budgeted Program Funds in a given Fiscal Year. The Stabilization Reserve for each County will be fully funded within the first three years.

Metro Supportive Housing Services
Financial Report for Quarterly Progress Report (IGA 7.1.2) and Annual Program Report (IGA 7.1.1)
Clackamas County
FY 2023-2024: Q4

Spend-Down Report for Program Costs
This section compares the spending plan of Program Costs in the Annual Program Budget to actual Program Costs in the Financial Report.

	% of Spending per Quarter			Comments
Program Costs (*excluding Built Infrastructure*)	**Budget**	**Actual**	**Variance**	*Explain any material deviations from the Spend-Down Plan, or any changes that were made to the initial Spend-Down Plan.* [1]
Quarter 1	10%	10%	0%	
Quarter 2	13%	18%	-5%	
Quarter 3	18%	18%	-1%	
Quarter 4	25%	35%	-10%	
Total	65%	81%	-16%	

	$ Spending YTD			Comments
Built Infrastructure	**Budget**	**Actual**	**Variance**	*Provide a status update for below. (required each quarter)*
Annual total:	12,250,000	5,437,423	6,812,577	

[1] A "material deviation" arises when the Program Funds spent in a given Fiscal Year cannot be reconciled against the spend-down plan to the degree that no reasonable person would conclude that Partner's spending was guided by or in conformance with the applicable spend-down plan.

Spend-Down Report for Carryover
This section compares the spending plan of investment areas funded by carryover to actual costs.
These costs are also part of the Spend-Down Report for Program Costs above. This section provides additional detail and a progress update on these investment areas.

	$ Spending by investment area			Comments
Carryover Spend-down Plan	**Budget**	**Actual** [2]	**Variance**	*Provide a status update for each line below. (required each quarter)*
Beginning Fund Balance (carryover balance)	58,623,269	92,701,597	(34,078,328)	
Describe investment area				
Contingency	2,263,770		2,263,770	
Stabilization Reserves	9,055,078		9,055,078	
Regional Strategies Implementation Fund	4,332,132	91,261	4,240,871	The carryover balance is funding approximately 66% of the county's regional strategies investments.
Expanding Capacity	4,070,857	2,724,151	1,346,706	YTD expenditures have primarily funded investments into service provider capacity building, internal communications support, homeless services advisory body support and expanded outreach contracts. These expanded outreach contracts received an average temporary increase of 26% funded by the carryover balance.
Upstream Investements	1,225,000	524,862	700,138	YTD expenditures funded a new eviction prevention pilot program done in collaboration with county Resolution Services staff to provide mediation services between landlords and tenants and a community paramedic pilot in collaboration with the county's Public Health Division.
Short-term Rent Assistance	5,000,000	5,265,656	(265,656)	YTD expenditures funded a short-term rental assistance program managed by the county's Social Services Division.
Capital Needs	6,750,000	5,437,423	1,312,577	YTD expenditures funded preliminary work at the future site of the Clackamas Village transitional shelter and the construction phase of the recently approved service-enriched resource center in Downtown Oregon City.
	32,696,837	14,043,352	18,653,485	
Remaining prior year carryover	25,926,432	78,658,245	(52,731,813)	
Estimated current year carryover	33,453,747	29,038,953	4,414,794	
Ending Fund Balance (carryover balance)	59,380,179	107,697,198	(48,317,019)	

[2] If the actual costs for any carryover investment areas are not tracked separately from existing program categories, use the Comments section to describe the methodology for determining the proportion of actual costs covered by carryover. For example: if service providers received a 25% increase in annual contracts for capacity building, and the costs are not tracked separately, the capacity building portion could be estimated as 20% of total actual costs (the % of the new contract amount that is related to the increase).

SUPPORTIVE HOUSING SERVICES Quarterly Report

SUBMITTED BY (COUNTY):   MULTNOMAH

FISCAL YEAR: 2024

QUARTER: QUARTER 4

SUPPORTIVE HOUSING SERVICES

QUARTERLY REPORT

*The following information should be submitted **45 calendar days after the end of each quarter**, per IGA requirements. When that day falls on a weekend, reports are due the following Monday.*

	Q1	Q2	Q3	Q4
Report Due	**Nov 15**	**Feb 15**	**May 15**	**Aug 15**
Reporting Period	Jul 1 – Sep 30	Oct 1 – Dec 31	Jan 1 – Mar 31	Apr 1 – Jun 30

Please do not change the formatting of margins, fonts, alignment, or section titles.

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hyperlinked

Section 1. Progress Narrative

In no more than 3-5 pages, please tell us about your investments and programming during the reporting period, focusing on at least one of the following topics per quarter: racial equity, capacity building, regional coordination and behavioral health, new investments, leverage, service systems coordination or any other topic connected to your local implementation plan.

Please also provide updates and information (including numbers or data) to demonstrate progress towards your work plan goals. Note that each topic/work plan goal must be covered in at least one quarterly report during the year. [Example, if you set an annual goal to increase culturally specific provider organizations by 15%, please tell us by quarter 2 how much progress you've made towards that goal (e.g. 5%)]

Please also address these areas in each quarter's narrative.
- *Overall challenges and barriers to implementation*
- *Opportunities in this quarter (e.g. promising findings in a pilot)*
- *Success in this quarter (e.g. one story that can represent overall success in this quarter)*
- *Emerging challenges and opportunities with service providers*

Executive Summary

On July 1, 2021, the Joint Office of Homeless Services began implementing the Supportive Housing Services (SHS) measure, increasing our resources and expanding our ability to deliver services to our neighbors experiencing homelessness in Multnomah County. Closing out the fourth quarter of fiscal year 2024, we are proud to report significant progress and momentum in our work to house and shelter these members of our community.

In FY 2024 alone, SHS dollars paid for work to place 2,322 people out of homelessness and into housing across all types — supportive housing, rapid rehousing, and other permanent housing (OPH) programs. That's a 76% increase over our SHS housing outcomes last year. In addition to SHS-funded housing outcomes, there are other Joint Office funding streams that contributed to placing an additional 3,000-plus people into housing.

Other permanent housing (OPH) encompasses all housing programs, with no disability requirement for eligibility. OPH includes all of the Population B rental assistance vouchers, recovery-oriented transitional housing programs, and Supportive Housing Services (SHS)-funded services attached to Emergency Housing Vouchers (EHV). Home Forward's EHV program, funded by the American Rescue Plan Act, was awarded 476 vouchers in FY 2021. SHS funds pay for the ongoing housing retention support for 300 EHV households. The EHV program falls under OPH because it does not require disability for eligibility.

One category within that total, rapid rehousing, saw particularly high outcomes. We placed 1,510 people in rapid rehousing last fiscal year, which is more than double the goal we set. We got close to hitting our permanent supportive housing goal as well, placing 442 households into supportive housing this fiscal year, which was 90% of our goal.

Additionally, we are on track to exceed our financial goals for the year, spending close to 85% of our SHS program budget. And, when you exclude the excess dollars carried over from previous years, **we actually invested every new dollar that Metro distributed to the Joint Office in Fiscal Year 2024** — despite Metro collecting and sending us more funding in the midst of the year than they initially forecast.

We are excited to build upon this foundation, continuing to make improvements and ensure we are serving our community as effectively as possible.

This year, SHS funds supported:
- Housing 1,510 people out of homelessness through rapid rehousing programming — a 117% increase over last year, and more than double our annual work plan goal.
- Placing 442 households out of homelessness and into supportive housing — 90% of our annual work plan goal. (This number is lower than expected; construction delays pushed off the opening of 242 apartments expected to serve as supportive housing this fiscal year, at the time this goal was set.)
- Eviction prevention services for 398 people.

This quarter, key SHS-related accomplishments from the Joint Office and Multnomah County are:

- Placing 689 people (Q4 PSH+RRH+OPH) out of homelessness and into housing, a 271% increase from those placed in Q4 from last year.[1]
- Serving a cumulative total of 4,232 people in Q4 (including both people newly served and people who are continuing to receive resources from previous years) with SHS-funded services.
- The Homeless Mobile Intake Team winning a national award recognizing its innovations in serving older adults.
- Supporting the opening of 30 new PSH apartments dedicated to immigrants and refugee households.

Annual Program Goals

In FY 2024, Multnomah County placed 2,322 individuals into housing using SHS funding. That's across all housing types: supportive housing, rapid rehousing, and other types of permanent housing. For our two most common housing interventions — permanent supportive housing and rapid rehousing — we'd aimed to house 1,005 households. By the end of the year, we housed 1,352 across those two interventions, exceeding that combined goal by 34%.

FY 2024 Annual Housing and Program Quantitative Goals			
Category 1: Regional Metrics	**Year to Date Q1+Q2+Q3 +Q4**	**FY24 Work Plan Goal**	**% Achieved of goal** *Based on households*
Supportive Housing (PSH) *removed transitional housing from reporting group*	574 people 442 households	655 people 490 households	90%
Rapid Rehousing	1,510 people 910 households	690 people 515 households	176%
Other Permanent Housing (Permanent Housing + Transitional Housing)	238 people 197 households	*Did not set goal*	N/A
SHS-funded Homeless Prevention (Eviction Prevention)	398 people 334 households	800 people 600 households	55%
JOHS ARPA-funded Homeless Prevention paired with SHS-funded FTE for distribution	5,685 people 2,198 households[2]	800 people 600 households *using the HP goal set in annual plan*	336%

Adapting Funding Strategies, Enabled by SHS, for Successful Homeless Prevention Outcomes

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[1] See data tables in Section 2.
[2] ARPA-funded outcomes are from Q3. We will provide Q4 numbers in the upcoming annual report.

While SHS-funded eviction prevention outcomes are currently below initial projections due to a portion of the funding being reallocated to support 10 staff members within the Expanded Provider Network, the overall impact on homeless prevention remains positive thanks to the strategic utilization of $8 million in JOHS-provided ARPA funds. This combined approach has not only allowed the County to meet but exceed its homeless prevention goals, demonstrating the effectiveness of leveraging multiple funding streams and adapting to evolving needs in addressing the critical issue of homelessness in Multnomah County.

Financial Spend-Down: Exceeding Expectations
In contrast to previous years when the Joint Office was not able to meet the ambitious SHS spend-down goals it set, we're pleased to announce that we not only met, but exceeded our Metro-approved target of spending at least 75% percent of our SHS program budget, which was larger than normal because of unused funds carried over from past years.

The Joint Office will have spent close to 85% of its program budget in FY 2024. When not including carryover from previous fiscal years, we spent 100% of our program budget, meaning every dollar Metro distributed to us this past fiscal year was put to work.

Building the internal and external capacity needed to deliver on this measure required not only time but a series of strategic steps, from developing spending dashboards to improving contracting and procurement practices. Last year we missed our spending target, leading to a year-long Corrective Action Plan decided between Multnomah County and Metro. At the close of year three, our capacity-building efforts are paying off.

We also leveraged over $4 million for behavioral health capital investments this quarter through unanticipated revenue carried over from FY 2023. These vital investments will strengthen our supply of long-term recovery-oriented housing through the acquisition or renovation of residential housing settings to folks in their recovery.

Our work to re-house and shelter hundreds more people year over year — alongside our significant improvements in spending — demonstrates our ability to serve people in need, meet the expectations of our community, meet milestones, and effectively manage a large and growing funding stream. Our fiscal team is finalizing the FY 2024 financials, and we look forward to sharing more details in our upcoming final financial report to Metro, to be submitted at the end of August.

SHS Program Continues to Expand its Cumulative Reach
We also examine the cumulative number of people currently being served by SHS-funded housing. The nature of many of these housing interventions means they are long-term, continuing to actively provide services to some people years after they were first placed in housing — which means the total number of people newly placed in housing doesn't tell the whole story.

In Q4 of FY 2024, a total of 4,760 people were actively supported by SHS-funded housing programs through the Joint Office (including both people newly placed in housing and people still housed and receiving services after they were first placed in previous fiscal years).

For permanent supportive housing, we are currently sustaining 987 households (1,128 people), which is already 44% of our Local Implementation Plan goal to provide ongoing permanent supportive housing to 2,235 households by 2031, seven years from now.

	FY 2024 Q4	FY 2024 Q1+Q2+Q3+Q4	FY 2021-FY 2023	FY 2021-Present	LIP Goal
FY 2021 - Present: 4,232 People Actively Served in Quarter 4					
40% Achieved of Local Implementation Plan Goals*					
Project type	**Newly served this quarter**	**Newly served this year**	**Still receiving services from previous years**	**Total receiving services in Q4**	***% based on households***
Supportive Housing (PSH only)	*100 people 79 households*	*574 people 442 households*	554 people 545 households	*1,128 people 987 households*	*2,235 households* ***44%***
Rapid Rehousing	*545 people 397 households*	*1,510 people 910 households*	708 people 335 households	*2,218 people 1,245 households*	*2,500 households newly placed per year* ***44%***
Other Permanent Housing	*44 people 35 households*	*238 people 197 households*	502 people 232 households	*740 people 429 households*	
Homeless Prevention (Eviction Prevention)	*83 people 66 households*	*398 people 334 households*	276 people 123 households	*674 people 457 households*	*1,000 households per year* ***33%***
Total	*772 people 577 households*	*2,720 people 1,883 households*	2,040 people 1,235 households	*4,760 people 3,118 households*	*40% of LIP Goals*

Average of the percentages

Investments & Programming

Successes

Cross-Department Partnerships Successfully Deliver Regional Long-Term Rent Assistance Programs
This quarter, we've seen further success through our Regional Long-Term Rent Assistance (RLRA) partnerships with three other County departments. The RLRA program benefits both qualified low-income tenants and private landlords by offering long-term rent subsidies and services to people exiting homelessness, and pays rent to landlords at fair market rates. RLRA is administered by Home Forward (the Housing Authority for Multnomah County), which delivers rent assistance directly to property owners and works with community-based organizations to enroll recipients in the program.

Department of County Human Services Intellectual and Developmental Disabilities RLRA Program In Q2, DCHS launched a new RLRA housing program in its Intellectual and Developmental Disabilities (IDD) division. IDD received 15 long-term PSH RLRA vouchers, significantly increasing the number of housing opportunities available to program participants. In Q4, the IDD team successfully placed 13 people in housing using RLRA vouchers. The access to both housing and the services of the IDD team help participants overcome barriers like mental health challenges and legal histories. Housing has led to significant improvements in participants' lives, including better health, employment, and overall happiness. One previously homeless individual, Allie, moved into housing despite several barriers including a legal history, evictions, landlord debt, mental health challenges and behaviors, substance use, seizures, and a disability. Since becoming housed Allie has worked to maintain stability with the help of a Direct Support Professional, various Multnomah County departments, a behavior specialist, on-site resident services, and teamwork from property management. Allie got an Emotional Support Animal, makes hip-hop music and art with her partner, and works part-time as a caregiver. Her Direct Support Professional recently took her to the Pacific Ocean for her birthday.

Department of County Justice Tenant-Based RLRA Program
The Department of Community Justice's new housing program made substantial progress this quarter. The program, which supports justice-involved individuals who face significant barriers to housing, includes 12 PSH units at Argyle Gardens and 45 tenant-based RLRA vouchers in the community. While initially facing challenges with tenant screening because of the legal history of participants, currently 31 out of 45 vouchers are in use, with another 10 assigned to participants actively seeking housing.

Health Department Assertive Community Treatment/Intensive Case Management RLRA Program In FY24, the Multnomah County Health Department expanded its support for people living with "dual diagnoses" — meaning they have both mental health challenges and substance use disorders — by adding 25 vouchers for intensive case management and treatment. This increased the total vouchers available for program participants to 150. All are funded by SHS. We heard one powerful success story from a woman who, after 12 years of homelessness, found stability and improved mental health after being placed in housing with an RLRA voucher. This highlights the vital role these vouchers play in participants' recovery and overall well being.

Homeless Mobile Intake Team Wins National Award for Innovation in Aging Services
This quarter, the Aging, Disability and Veterans Services Division's Homeless Mobile Intake Team, funded with SHS dollars through the Department of County Human Services, received a national award for its innovative work serving older adults and people with disabilities who are experiencing homelessness. Launched in fall 2022, the team adopts a unique, proactive approach to serving this population. Instead of people having to navigate bureaucratic hurdles, the team brings expertise and services directly to them, building relationships and understanding individual needs.

The support they provide includes housing, food assistance, and medical care. Case managers connect with service partners to help cover move-in costs and provide supportive services, including furniture, access ramps, and home modifications when needed. Significantly, the team's work can also help open the door to long-term housing vouchers. Since its inception, the team has served 295 individuals,

primarily those aged 61 to 80.

In Q4 the team was selected for the USAging Aging Innovations Award. The national award recognizes teams that find new ways to support older adults, people with disabilities, and caregivers.

Opportunities

Permanent Supportive Housing FUSE Pilot Begins Outreach and Placement
The SHS-funded Frequent Users System Engagement (FUSE) pilot, aimed at supporting individuals with complex needs who often cycle through the health, housing, and justice systems, began conducting outreach and successfully placed its first participant into housing in Q4. The program uses data to identify individuals with high use of all three systems and prioritize them for housing and wraparound services. The program's goal is to house and support 40 individuals by the end of FY 2025, while also reducing participants' jail bookings and emergency department visits, and increasing their engagement with comprehensive healthcare services.

Two providers, Greater New Hope and East County Housing, are collaborating to implement FUSE. East County Housing is focused on outreach, engagement, housing navigation and tenancy support, while Greater New Hope provides behavioral health services.

The first phase of the FUSE pilot identified 898 individuals in Multnomah County as frequent users of those three systems, and the second phase will support a portion of those who would benefit from these services. In Q4 participants began receiving RLRA vouchers, and while housing placements are expected to increase throughout FY25, Greater New Hope is already providing crucial behavioral health services to support participants in stabilizing and maintaining their housing.

Integrating health and housing resources can be complex because of the differences between those systems, but the FUSE pilot offers a valuable opportunity for cross-sector collaboration. The Joint Office actively supported Greater New Hope in Q4 to obtain Medicaid billing approval, allowing them to expand their services. Additionally, Joint Office staff are coordinating with Health Share, Trillium, and Care Oregon to support future PSH projects that will be capable of billing health systems for services. This is a crucial innovation, as other PSH programs are struggling to provide services that meet the needs of households with acute behavioral health challenges.

Hazel Ying Lee Apartments: A Multifaceted Funding Approach
The Hazel Ying Lee Apartments, a new 206-unit affordable housing development in the Creston-Kenilworth neighborhood, held its grand opening celebration in Q4. This program demonstrates a successful integration of diverse funding streams to address critical housing needs.

The project is a partnership between Home Forward, Immigrant and Refugee Community Organization (IRCO), the Portland Housing Bureau, and the Joint Office. While Home Forward owns and manages the property, the Portland Housing Bureau contributed significant funding to develop the site. The Joint Office, using SHS dollars, is funding essential wraparound services for the 30 units of permanent supportive housing onsite. Those units, which are designated for immigrant and refugee households, will be supported annually with $524,985 of supportive services, funded by SHS and provided by IRCO. Those services will help residents maintain housing stability and thrive in their new homes.

This strategic partnership is an example of how leveraging multiple funding sources, including critical SHS dollars, can support the creation of much-needed affordable and supportive housing, particularly for vulnerable populations such as immigrants and refugees.

Emergency Housing Voucher Retention Services Create Stability in the Family System
Client assistance funds — flexible funding that supports individuals and families in remaining stably housed — was particularly important this quarter to the Emergency Housing Voucher (EHV) program in the Joint Office's family system.

SHS funds pay for the ongoing housing retention support for 300 EHV households delivered by 10 full-time staff members that were added to the family, youth, and DV systems with SHS funding. These households receive comprehensive assistance like home visits, service navigation, domestic violence support, employment services, and benefits acquisition, supporting them to achieve stability and independence.

For families with disability-related challenges, client assistance funds have proven to have a significant impact. The funds can be used to cover essentials like utilities, food, and medical expenses. This is evident in the success of families housed through the Emergency Housing Voucher (EHV) program through provider Path Home.

Path Home shared a notable success story of a family whose primary income earner became disabled, leading to a significant loss of income and homelessness. The EHV program started at the perfect time to help this family regain housing, provide client support, and pursue their goals. Now, two of the children are graduating from high school and have received college scholarships, while the family member with the disability is exploring employment opportunities. The father credits Path Home's program for providing the stability needed to achieve these milestones. This highlights the transformative power of housing paired with comprehensive support, made possible by SHS.

Annual Work Plan Progress

Fostering a Shared Commitment to Reduce Racial Disparities
Multnomah County's 10-year Local Implementation Plan emphasized that all efforts to tackle homelessness must prioritize racial equity in order to address disparities produced by institutional and systemic racism. In FY 2024, the Joint Office worked toward this goal by requiring all SHS-funded providers to create an equity plan or goal.

As described in the FY 2024 annual work plan, the Joint Office made pointed efforts throughout the year to support providers in meeting this requirement by offering training, technical assistance, identifying provider-specific barriers, and developing plans to monitor progress. The Joint Office's Equity Manager collaborated with the JOHS Program Team to establish clearer expectations for developing, collecting, and monitoring equity work plans and goals in partnership with providers. To expand on this work, the JOHS Equity Manager and Evaluation staff presented a session on Equity Work Plans at the Joint Office's second Provider Conference hosted in spring 2024. During the session, providers received information on

equity work plan requirements, asked questions, and engaged in small group activities to brainstorm equity plan ideas and goals with other providers and JOHS staff.

The Joint Office also sought feedback and received recommendations from our Equity and SHS advisory committees. Members from the Equity Advisory Committee were consulted to determine best practices for monitoring equity plans and the SHS Advisory Committee formed a workgroup focused on enhancing equity considerations within SHS programming. The SHS subcommittee developed a set of recommendations focused on intersectional equity, evaluation, accountability, and investment priorities. The feedback and recommendations provided by the advisory bodies will continue to help guide future equity efforts within our department and our network of providers.

To close this fiscal year, we note that 60% of providers receiving SHS funds have submitted either an equity work plan or have an equity-focused goal identified in their contract, and 76% of all SHS-funded providers submitted either equity work plans, an equity goal, or included equity considerations in their narrative reporting. While this isn't 100%, we are confident that our work over the past year to help providers set racial equity goals, coupled with our ongoing work in improving equitable program design and provider procurement, had an impact in fostering a shared dedication to eliminating racial disparities and rooting our homelessness services system in racially equitable practices.

Equity and Engagement Analyst's Key Role in Capacity Building and Provider Support
This year, the Joint Office helped build capacity not just among our existing contractors, but with small, emerging, and culturally specific organizations newly qualified for SHS funding. These efforts helped us surpass our goals to provide technical assistance and/or capacity building funds to 15-20 new and expanding providers, and engage and provide support to 10-15 new and emerging culturally specific organizations.

This was due in large part to the efforts of the Equity and Engagement Senior Analyst at the Joint Office, an SHS-funded position that has been instrumental in building capacity among new, expanding, and culturally specific organizations seeking SHS funding. The analyst surpassed these two goals primarily through designing and implementing a new System Development pilot grant designed to help smaller providers build administrative infrastructure and secure contracts with the Joint Office.

The pilot leverages county general funding (CGF) for new and emerging providers to strengthen their infrastructure and enhance services. The analyst collected feedback on the grant design from a group of 27 culturally specific providers, then supported that same group with the application process, including helping with technical writing and budgeting. Of the 27 original providers, 12 applied and 11 were selected as inaugural grant recipients.

Providers will use grant funding for various projects such as HR support, strategic planning, data management infrastructure, equity consultations, and gender identity training. These projects will support organizations in expanding their service capability and position them to more easily contract with the Joint Office in the future. The Joint Office has budgeted over $1M in SHS funding for FY 2025 to continue this work, and will rely on insights gleaned from the pilot to inform program design going forward.

The analyst also actively supported culturally specific organizations by connecting them to the equity team for learning opportunities and fostering their engagement in Joint Office processes. This work is in alignment with the SHS Community Advisory Committee's recommendation to build capacity among small, newly qualified organizations, and prioritize culturally specific providers for capacity building funds.

Additionally, the Joint Office supported new and expanding providers this fiscal year through improvements to our contracting, invoicing, and payment processes. Joint Office staff conducted quarterly contract management retreats to support ongoing training and development, and created updated tools to simplify performance reviews, communication, and monitoring. A recent Multnomah County audit showed these efforts are paying off: the Joint Office was recognized for leading the county in timely invoice payments, which are crucial for smaller, emerging providers dependent on prompt reimbursements.

Analysis of Unmet Needs and JOHS Investments in Multnomah's East County
The Joint Office is committed to geographic equity, particularly in serving east Multnomah County, an area historically underserved by government programs, including homeless services.

In FY 2024, the Joint Office performed a Geographic Equity Study, an analysis of the extent to which the Joint Office fulfills that mandate equitably in all areas of the county, as recommended in our Local Implementation Plan. In Q4, the Joint Office began the final phases of the study, which will be completed in FY 2025.

In order to assess whether the Joint Office is providing services equitably across the county, the study includes both a needs assessment for different areas of the county and an analysis of Joint Office investments, services, and participant outcomes for different areas.

Overall, this assessment suggests that unmet housing needs among low-income households are highest in Gresham, East County and North Portland, as measured by the number of people living in cost-burdened and overcrowded households. Gresham and East County also have a higher share of the population who identify as BIPOC and who have lower levels of economic resources than the county overall. Meanwhile, Portland's Downtown, Old Town, and Pearl District, and Inner/Central East Portland have the largest populations experiencing homelessness, both sheltered and unsheltered.

Looking next at the geographic distribution of Joint Office investments, the analysis identifies projects in the FY 2024 and FY 2025 JOHS budgets that are either contracted to providers located in East County, targeted towards residents of East County communities, or are sites (e.g. shelters and housing) located in East County. To name a few, in stride with the East County analysis, the Joint Office has made key updates to investments in East County for FY 2025 such as increasing designated SHS funding for furniture banking and a $300K increase in homeless services in East County cities. The project is currently reviewing and updating this list. Using the findings, the analysis will summarize the level of investment and bed/unit capacity in shelter and housing in East County, as well as the number of participants served in these programs and performance outcomes such as housing retention rates. The takeaways from this analysis will include programmatic and policy recommendations for improving geographic equity across the county.

Overall Challenges & Barriers

Permanent Supportive Housing (PSH) remains a critical solution for individuals facing chronic homelessness, but providers face challenges:

- **Increased landlord risk aversion:** Stricter screening criteria and reluctance to participate in PSH programs result in more denials and delays for housing applicants.
- **Acute behavioral health needs:** The rising complexity of participant needs stretches PSH resources, particularly in site-based programs where it can impact the broader community.
- **Safety concerns:** Increased safety issues related to a surge in acuity has caused providers to take costly security measures, which impacts residents.

These challenges highlight the need for continued support and collaboration to ensure the effectiveness of PSH programs. The increasing complexity of needs among individuals experiencing homelessness is a trend observed not only in PSH projects but also across various care systems and housing projects. The Joint Office is actively tackling these challenges through various strategies:

- The Homelessness Response Action Plan, which aims to provide holistic support for homeless individuals through multi-system collaboration.
- Increased investment in PSH services, raising the supportive service cap from $10,000 to $15,000 annually per household, with further increases for culturally specific, family PSH, and site-based projects.
- The FUSE project, specifically targeting high-acuity participants with complex needs.

These initiatives demonstrate a proactive approach to addressing the evolving needs of the homeless population, and we anticipate their positive impact in the coming year.

Emerging Challenges & Opportunities

SHS Provides Emergency Support for Immigrant, Refugee, and Asylum-Seeking Families
This quarter, providers in the family and youth systems noted emerging challenges and opportunities related to a rising number of immigrants and asylum seekers arriving in Multnomah County. Scarce resources for this population make navigating services a challenge. Even though resources for asylees[3] and refugee families are the primary responsibility of other agencies, JOHS provides services to people regardless of residency status and, as a result, providers were able to use SHS funding to identify opportunities for these families and connect them with support.

For example, within the family system, IRCO started leasing units in their Hazel Ying Lee Apartments, providing 30 permanent supportive housing units exclusively for immigrant and refugee families. The project will be fully operational in FY 2025. Additionally, Rockwood CDC exceeded its housing goal for families, using the challenges of helping asylum-seeking households as a learning opportunity to better serve this population. Finally, Our Just Future helped a Venezuelan family who sought asylum in the U.S.,

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[3] An asylee is a person who meets the definition of refugee and is already present in the United States or is seeking admission at a port of entry. See dhs.gov

providing housing and connecting them with legal and case management services, demonstrating the impact of culturally specific support for vulnerable families.

In the youth system, Metropolitan Public Defender (MPD) also faced a growing backlog of 62 immigration cases due to increased referrals from undocumented families in shelters. Despite assigning six new cases weekly, limited staffing prevents MPD from addressing the demand promptly. This highlights the escalating need for legal services, particularly for immigrants —an issue the Joint Office will continue to examine.

Section 2. Data & Data Disaggregation

Please use the following table to provide and disaggregate data on Housing Placement and Homelessness Prevention outcomes for Populations A and B. Please use your local methodologies to track and report Populations A and B. You can provide context for the data you provided in the context narrative below.

Data Disclaimer

HUD Universal Data Element data categories will be used in this template for gender identity and race/ethnicity until county data teams develop regionally approved data categories that more accurately reflect individual identities.

Changes to Data Reporting Categories in FY 2024			
Change Category	**Specific Change**	**Impact**	**Effective Date**
Supportive Housing Table	Removed recovery-oriented transitional housing programs from outcomes to align with regional methodology	Previously reported ROTH outcomes for FY24 were removed from SH table and added to OPH table.	FY 2024 Q4
Race/Ethnicity	Addition of "Middle Eastern or North African" category	Modify data model to include new category, update code to handle input and reporting for this category.	FY 2024 Q3
Gender	Change to multiple-selection field	Modify data model to allow multiple selections, update code to handle input, storage, and reporting for multiple gender selections.	FY 2024 Q3
Supportive Housing Table	Removal of permanent housing outcomes from programs with rent assistance but no wrap-around services	Filter out data related to these programs from the Supportive Housing table.	FY 2024 Q2
Supportive Housing Table	Inclusion of outcomes from recovery-oriented transitional housing programs	Modify code to include data from these programs in Supportive Housing table calculations and reporting.	FY 2024 Q2
RLRA Table	Collection of gender identity information for all household members	Modify data model to store gender identity for all members, update code to handle input, storage, and reporting for this expanded data set.	FY 2024 Q2

Section 2.A Housing Stability Outcomes: Placements & Preventions

Housing Placements By Intervention Type: Supportive Housing

# Housing Placements – Supportive Housing*	This Quarter		Year to Date	
	#	%	#	%
Total people	*100*		*574*	
Total households	*79*		*442*	
Race & Ethnicity				
Asian or Asian American	1	1%	17	3%
Black, African American or African	30	30%	196	34%
Hispanic or Latin(a)(o)(x)	18	18%	99	17%
American Indian, Alaska Native or Indigenous	22	22%	118	21%
Native Hawaiian or Pacific Islander	2	2%	21	4%
Middle Eastern or North African	0	0%	1	0%
White	45	45%	255	44%
Non-Hispanic White (subset of White category)	37	37%	178	31%
Client Doesn't Know	0	0%	0	0%
Client Refused	0	0%	0	0%
Data Not Collected	1	1%	16	3%
Disability Status				
	#	%	#	%
Persons with disabilities	76	76%	426	74%
Persons without disabilities	22	22%	124	22%
Disability unreported	2	2%	24	4%
Gender Identity				
	#	%	#	%
Male	48	48%	289	50%
Female	44	44%	243	42%
A gender that is not singularly 'Male' or 'Female'	6	6%	23	4%
Transgender	2	2%	13	2%
Questioning	0	0%	2	0%
Client doesn't know	0	0%	0	0%
Client refused	0	0%	1	0.2%
Data not collected	1	1%	11	2%

Housing Placements By Intervention Type: Rapid Re-Housing & Short-term Rent Assistance

# Housing Placements – Rapid Re-Housing (RRH)**	This Quarter		Year to Date	
	#	%	#	%
Total people	*545*		*1510*	
Total households	*397*		*910*	
Race & Ethnicity				
Asian or Asian American	12	2%	50	3%
Black, African American or African	161	30%	507	34%
Hispanic or Latin(a)(o)(x)	109	20%	303	20%
American Indian, Alaska Native or Indigenous	41	8%	119	8%
Native Hawaiian or Pacific Islander	16	3%	116	8%
Middle Eastern or North African	1	0.2%	3	0.2%
White	268	49%	650	43%
Non-Hispanic White (subset of White category)	219	40%	498	33%
Client Doesn't Know	0	0%	0	0%
Client Refused	0	0%	0	0%
Data Not Collected	22	4%	51	3%
Disability Status				
	#	*%*	*#*	*%*
Persons with disabilities	269	49%	641	42%
Persons without disabilities	226	41%	745	49%
Disability unreported	50	9%	124	8%
Gender Identity				
	#	%	#	%
Male	289	53%	705	47%
Female	238	44%	758	50%
A gender that is not singularly 'Male' or 'Female'	6	1%	25	2%
Transgender	4	1%	6	0.4%
Questioning	1	0.2%	1	0.1%
Client doesn't know	0	0%	0	0%
Client refused	2	0.4%	3	0.2%
Data not collected	9	2%	17	1%

Housing Placements By Intervention Type: Other Permanent Housing Programs (if applicable)
If your county does not have Other Permanent Housing, please write N/A

# Housing Placements – Other Permanent Housing Programs (OPH)***	This Quarter		Year to Date	
	#	%	#	%
Total people	*44*		*238*	
Total households	*35*		*197*	
Race & Ethnicity				
Asian or Asian American	0	0%	4	2%
Black, African American or African	11	25%	76	32%
Hispanic or Latin(a)(o)(x)	8	11%	44	18%
American Indian, Alaska Native or Indigenous	7	16%	25	11%
Native Hawaiian or Pacific Islander	1	2%	8	3%
Middle Eastern or North African	0	0%	0	0%
White	23	52%	127	53%
Non-Hispanic White (subset of White category)	18	41%	95	40%
Client Doesn't Know	0	0%	0	0%
Client Refused	0	0%	0	0%
Data Not Collected	1	2%	6	3%
Disability Status				
	#	*%*	*#*	*%*
Persons with disabilities	35	80%	187	79%
Persons without disabilities	9	20%	45	19%
Disability unreported	0	0%	6	3%
Gender Identity				
	#	%	#	%
Male	27	61%	143	60%
Female	16	36%	87	37%
A gender that is not singularly 'Male' or 'Female'	1	2%	3	1%
Transgender	0	0%	2	1%
Questioning	0	0%	0	0%
Client doesn't know	0	0%	0	0%
Client refused	0	0%	1	0.4%
Data not collected	0	0%	3	1%

Eviction and Homelessness Prevention

# Houseless Prevention – Newly Served Final	This Quarter		Year to Date	
	#	%	#	%
Total people	*83*		*398*	
Total households	*66*		*334*	
Race & Ethnicity				
Asian or Asian American	1	1%	8	2%
Black, African American or African	22	27%	114	29%
Hispanic or Latin(a)(o)(x)	4	5%	37	9%
American Indian, Alaska Native or Indigenous	4	5%	24	6%
Native Hawaiian or Pacific Islander	3	4%	4	1%
Middle Eastern or North African	0	0%	2	1%
White	52	63%	241	61%
Non-Hispanic White (subset of White category)	49	59%	209	53%
Client Doesn't Know	0	0%	0	0%
Client Refused	0	0%	0	0%
Data Not Collected	2	2%	14	4%
Disability Status				
	#	%	#	%
Persons with disabilities	58	70%	278	70%
Persons without disabilities	22	27%	94	24%
Disability unreported	3	4%	26	7%
Gender Identity				
	#	%	#	%
Male	37	45%	154	39%
Female	45	54%	228	57%
A gender that is not singularly 'Male' or 'Female'	0	0%	8	2%
Transgender	1	1%	5	1%
Questioning	0	0%	0	0%
Client doesn't know	0	0%	0	0%
Client refused	0	0%	2	1%
Data not collected	0	0%	2	1%

Section 2. B Regional Long-Term Rent Assistance Program

*The following data represents a **subset** of the above Housing Placements data. The Regional Long-term Rent Assistance Program (RLRA) primarily provides permanent supportive housing to SHS priority Population A clients (though RLRA is not strictly limited to PSH or Population A).*

RLRA data is not additive to the data above. The housing placements below are duplicates of those shown in the data above.

*Please disaggregate data for the **total number of people in housing using an RLRA voucher** during the quarter and year to date.*

Regional Long-term Rent Assistance Quarterly Program Data	This Quarter		Year to Date	
	#	%	#	%
# of RLRA vouchers issued during reporting period	130		453	
# of people newly leased up during reporting period	237		730	
# of households newly leased up during reporting period	116		428	
# of people in housing using an RLRA voucher during reporting period	1178		1241	
# of households in housing using an RLRA voucher during reporting period	771		826	
Race & Ethnicity				
Asian or Asian American	22	1.6%	23	1.6%
Black, African American or African	458	36.8%	477	36.3%
Hispanic or Latin(a)(o)(x)	254	15.0%	259	14.6%
American Indian, Alaska Native or Indigenous	124	12.8%	134	13.1%
Native Hawaiian or Pacific Islander	47	3.4%	49	3.3%
White	631	54.2%	666	54.4%
Non-Hispanic White (subset of White category)	357	36.4%	385	37.0%
Client Doesn't Know	0	0.0%	0	0.0%
Client Refused	0	0.0%	0	0.0%
Data Not Collected	0	0.0%	0	0.0%
Disability Status				
	#	%	#	%
Persons with disabilities	671	87.0%	722	87.4%
Persons without disabilities	100	13.0%	104	12.6%
Disability unreported	0	0.0%	0	0.0%
Gender Identity				
	#	%	#	%
Male	395	51.2%	433	52.4%
Female	357	46.3%	372	45.0%
A gender that is not singularly 'Male' or 'Female'	14	1.8%	15	1.8%
Transgender	5	0.6%	6	0.7%

Questioning	1	0.1%	1	0.1%
Client doesn't know	0	0.0%	0	0.0%
Client refused	1	0.1%	1	0.1%
Data not collected	1	0.1%	1	0.1%

Definitions

The number of RLRA vouchers issued during the reporting period: Number of households who were issued an RLRA voucher during the reporting period. (Includes households still looking for a unit and not leased up.)

The number of households/people newly leased up during the reporting period: Number of households/people who completed the lease-up process and moved into their housing during the reporting period.

The number of households/people in housing using an RLRA voucher during the reporting period: Number of households/people who were in housing using an RLRA voucher at any point during the reporting period. Includes (a) everyone who has been housed to date with RLRA and is still housed and (b) households who became newly housed during the reporting period.

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on the RLRA program.

Section 2. C Subset of Housing Placements and Preventions: Priority Population Disaggregation

*The following is a **subset** of the above Housing Placements and Preventions data (all intervention types combined), which represents housing placements/preventions for SHS priority population A.*

Population A Report	This Quarter		Year to Date	
	#	%	#	%
Population A: Total **people** placed into permanent housing/prevention	*454*		*1,416*	
Population A: Total **households** placed into permanent housing/prevention	*360*		*1,042*	
Race & Ethnicity				
Asian or Asian American	7	2%	29	2%
Black, African American or African	115	25%	459	32%
Hispanic or Latin(a)(o)(x)	74	16%	226	16%
American Indian, Alaska Native or Indigenous	51	11%	187	13%
Native Hawaiian or Pacific Islander	5	1%	49	3%
Middle Eastern or North African	2	0%	4	0.3%
White	255	56%	734	52%
(Subset of White): Non-Hispanic White	219	48%	571	40%
Client Doesn't Know	0	0%	0	0%
Client Refused	0	0%	0	0%
Data Not Collected	14	3%	38	3%
Disability Status				
	#	*%*	*#*	*%*
Persons with disabilities	309	68%	975	69%
Persons without disabilities	113	25%	361	25%
Disability unreported	32	7%	80	6%
Gender Identity				
	#	%	#	%
Male	247	54%	734	52%
Female	189	42%	624	44%
A gender that is not singularly 'Male' or 'Female'	10	2%	35	2%
Transgender	3	1%	13	1%
Questioning	1	0.2%	2	0%
Client doesn't know	0	0%	0	0%

The table above asks for the number of people and households placed into permanent housing and/or *prevention*. Population A, by definition, excludes people in housing. We do not include homeless prevention (eviction prevention) outcomes in the Population A Report.

Analysis of Year to Date outcomes

This year, a total of 1,416 people from Population A were placed into permanent housing/prevention, with 454 of those placements occurring this quarter. Among the population served this year, 69% were identified as having disabilities. The reason there are a number of people being counted as Population A without having a disability is because Population A is measured by the head of household and may not represent the other people in that household.

*The following is a **subset** of Housing Placements and Preventions data (all intervention types combined), representing housing placements and preventions for SHS priority population B.*

Population B Report	This Quarter		Year to Date	
	#	%	#	%
Population B: Total **people** placed into permanent housing/prevention	318		1304	
Population B: Total **households** placed into permanent housing/prevention	217		841	
Race & Ethnicity				
Asian or Asian American	7	2%	49	4%
Black, African American or African	109	34%	442	34%
Hispanic or Latin(a)(o)(x)	65	20%	264	20%
American Indian, Alaska Native or Indigenous	22	7%	103	8%
Native Hawaiian or Pacific Islander	18	6%	100	8%
Middle Eastern or North African	1	0.3%	3	0%
White	133	42%	546	42%
(Subset of White): Non-Hispanic White	104	33%	411	32%
Client Doesn't Know	0	0%	0	0%
Client Refused	0	0%	0	0%
Data Not Collected	12	4%	55	4%
Disability Status				
	#	%	#	%
Persons with disabilities	129	41%	557	43%
Persons without disabilities	166	52%	647	50%
Disability unreported	23	7%	100	8%
Gender Identity				
	#	%	#	%
Male	154	48%	566	43%
Female	154	48%	692	53%
A gender that is not singularly 'Male' or 'Female'	3	1%	24	2%
Transgender	4	1%	13	1%
Questioning	0	0%	1	0.1%
Client doesn't know	0	0%	0	0%
Client refused	2	1%	3	0.2%
Data not collected	5	2%	11	1%

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on Population A/B.

Section 2.D Other Data: Non-Housing Numeric Goals

This section shows progress toward quantitative goals set in county annual work plans. Housing placement and prevention progress are already included in the above tables. This section includes goals such as shelter beds, outreach contacts, and other quantitative goals that should be reported quarterly. This data in this section may differ from county to county and will differ year to year, as it aligns with goals set in county annual work plans.

 Instructions: Please complete the tables below, as applicable to your annual work plans:

All counties, please complete the table below:

Goal Type	Your FY 23-24 Goal	Progress this Quarter	Progress YTD
Shelter Beds	*245 beds*	*544*	*544*

If applicable for quarterly reporting, other goals from your work plan, if applicable (e.g., people served in outreach, other quantitative goals).

Goal Type	Your FY 23-24 Goal	Progress this Quarter	Progress YTD
N/A			

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided in the above tables.

Methodology to Track Shelter Bed Goal
The JOHS measures the programmatic capacity in HMIS of the active SHS-funded shelter beds, which is the number of beds the provider reports as active in HMIS.

Emergency shelter beds include non-congregate, alternative, and congregate programs that will serve adults, youth, families with children, and people fleeing domestic violence.

Section 3. Financial Reporting

Please complete the quarterly financial report and include the completed financial report to this quarterly report as an attachment.

As agreed upon with Metro, financial reporting will be submitted on August 30.

Due Date: The Quarterly Progress Report is due to Metro within 45 days after the end of each quarter (IGA 7.1.2). The Annual Program Report is due no later than October 31 of each year (IGA 7.1.1).

Metro Supportive Housing Services
Financial Report for Quarterly Progress Report (IGA 7.1.2) and Annual Program Report (IGA 7.1.1)
Multnomah County
FY24 Q4

Financial Report (by Program Category) — COMPLETE THE SECTION BELOW EVERY QUARTER. UPDATE AS NEEDED FOR THE ANNUAL REPORT.

	Annual Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	Total YTD Actuals	Variance Under / (Over)	% of Budget	Comments
Metro SHS Resources									
Beginning Fund Balance	108,677,054	126,381,795				126,381,795	(17,704,741)	116%	*Counties will provide details and context on any unbudgeted amounts in Beginning Fund Balance in the narrative of their report, including the current plan and timeline for budgeting and spending it.*
FY23 Revenues exceeding Forecast		46,943,361				46,943,361			
Diff FY23 Actual vs Budgeted Exp		58,146,092				58,146,092			*43.4M is the underspend and $14.7M is contingency and reserves*
July-August 23 (FY24) collections recorded in FY23		17,704,741				17,704,741			*Multnomah County accounting procedure is to accrue 60 days of tax receipts for the quarter ended*
Interest Earnings and Other Misc Revenues		3,587,601				3,587,601			
Metro SHS Program Funds	96,190,265		33,648,238	33,132,820	73,655,220	140,436,278	(44,246,013)	146%	September's program funds reflected in October
Interest Earnings	-	1,911,716	3,156,475	(1,651,531)	1,083,781	4,500,442	(4,500,442)	N/A	Correction to interest posting from central finance in Q3
insert addt'l lines as necessary			27,201	34,271	142,756	204,228	(204,228)	N/A	Other MISC revenue $34K
Total Metro SHS Resources	204,867,319	128,293,511	36,831,914	31,515,560	74,881,757	271,522,742	(66,655,423)	133%	
Metro SHS Requirements									
Program Costs									
Activity Costs									
Shelter, Outreach and Safety on/off the Street	45,945,076	1,661,456	2,582,452	26,766,055	(2,855)	31,007,108	14,937,968	67%	qtr 4 has a credit due to reconciliation of a provider payment
Short-term Housing Assistance (rent assistance and services,	45,743,787	2,297,893	7,125,511	7,253,728	18,054,040	34,731,172	11,012,615	76%	
Permanent supportive housing services (wrap-around	35,391,252	3,256,109	8,968,063	7,886,581	14,753,365	34,864,118	527,134	99%	
Long-term Rent Assistance (RLRA, the rent assistance portion	13,593,179	802,246	1,646,854	2,058,450	4,599,954	9,107,505	4,485,674	67%	
Systems Infrastructure (service provider capacity building and organizational health, system development, etc)	13,907,295	743,074	10,740,739	1,118,378	1,391,560	13,993,750	(86,455)	101%	
Built Infrastructure (property purchases, capital improvement projects, etc)	20,473,881				8,007,350	8,007,350	12,466,531	39%	
Other supportive services (employment, benefits)	6,505,399	574,505	1,477,716	1,595,837	3,922,627	7,570,686	(1,065,287)	116%	
insert addt'l lines for other activity categories						-		N/A	
Subtotal Activity Costs	181,559,869	9,335,282	32,541,335	46,679,029	50,726,042	139,281,689	42,278,180	77%	
Administrative Costs [1]									*Service Provider Administrative Costs are reported as part of Program Costs above. Counties will provide details and context for Service Provider Administrative Costs within the narrative of their Annual Program Report.*
County Admin: Long-term Rent Assistance	1,133,265	131,742	224,967	238,091	576,159	1,170,958	(37,693)	103%	Administrative Costs for long-term rent assistance equals 11% of Partner's YTD expenses on long-term
County Admin: Other	2,632,694	411,835	343,700	348,868	1,130,361	2,234,764	397,930	85%	Administrative Costs for Other Program Costs equals 2% of total YTD Other Program Costs.
Subtotal Administrative Costs	3,765,959	543,577	568,667	586,958	1,706,520	3,405,722	360,237	90%	
Other Costs									
Regional Strategy Implementation Fund [2]	4,809,513			288,000	500,000	788,000	4,021,513	16%	Correction to Qtr 1 and 2 should be in systems infrastructure
insert addt'l lines as necessary						-	-	N/A	
Subtotal Other Costs	4,809,513	-	-	288,000	500,000	788,000	4,021,513	16%	
Subtotal Program Costs	190,135,341.00	9,878,859.45	33,110,002.29	47,553,987.30	52,932,561.89	143,475,410.93	46,659,930	75%	
Contingency [3]	4,809,513	4,809,513				4,809,513	-	100%	
Stabilization Reserve[4]	9,619,026	9,619,026				9,619,026	-	100%	
Regional Strategy Impl Fund Reserve [2]	-					-	-	N/A	
RLRA Reserves	-					-	-	N/A	
Other Programmatic Reserves	303,439	303,439				303,439	-	100%	
insert addt'l lines as necessary						-	-	N/A	
Subtotal Contingency and Reserves	14,731,978	14,731,978	-	-	-	14,731,978	-	100%	
Total Metro SHS Requirements	204,867,319	24,610,837	33,110,002	47,553,987	52,932,562	158,207,389	46,659,930	77%	
Ending Fund Balance	-	103,682,674	3,721,912	(16,038,427)	21,949,195	113,315,354	(113,315,354)	N/A	

[1] Per IGA Section 3.4.2 ADMINISTRATIVE COSTS, Metro recommends, but does not require, that in a given Fiscal Year Administrative Costs for SHS should not exceed 5% of annual Program Funds allocated to Partner; and that Administrative Costs for administering long-term rent assistance programs should not exceed 10% of annual Program Funds allocated by Partner for long-term rent assistance.

[2] Per IGA Section 8.3.3 REGIONAL STRATEGY IMPLEMENTATION FUND, each County must contribute not less than 5% of its share of Program Funds each Fiscal Year to a Regional Strategy Implementation Fund to achieve regional investment strategies.

[3] Per IGA Section 5.5.4 CONTINGENCY, partner may establish a contingency account in addition to a Stabilization Reserve. The contingency account will not exceed 5% of Budgeted Program Funds in a given Fiscal Year.

[4] Per IGA Section 5.5.3 PARTNER STABILIZATION RESERVE, partner will establish and hold a Stabilization Reserve to protect against financial instability within the SHS program with a target minimum reserve level will be equal to 10% of Partner's Budgeted Program Funds in a given Fiscal Year. The Stabilization Reserve for each County will be fully funded within the first three years.

Metro Supportive Housing Services

Financial Report for Quarterly Progress Report (IGA 7.1.2) and Annual Program Report (IGA 7.1.1)

Multnomah County

FY24 Q4

Spend-Down Report for Program Costs

This section compares the spending plan of Program Costs in the Annual Program Budget to actual Program Costs in the Financial Report.

Program Costs *(excluding Built Infrastructure)*	% of Spending per Quarter			Comments
	Budget	**Actual**	**Variance**	*Explain any material deviations from the Spend-Down Plan, or any changes that were made to the initial Spend-Down Plan. [1]*
Quarter 1	5%	6%	-1%	
Quarter 2	10%	20%	-10%	
Quarter 3	25%	28%	-3%	
Quarter 4	35%	26%	9%	
Total	75%	80%	-5%	

Built Infrastructure	$ Spending YTD			Comments
	Budget	**Actual**	**Variance**	*Provide a status update for below. (required each quarter)*
Annual total	20,473,881	8,007,350	12,466,531	

[1] A "material deviation" arises when the Program Funds spent in a given Fiscal Year cannot be reconciled against the spend-down plan to the degree that no reasonable person would conclude that Partner's spending was guided by or in conformance with the applicable spend-down plan.

SUPPORTIVE HOUSING SERVICES QUARTERLY REPORT

SUBMITTED BY (COUNTY):   **WASHINGTON COUNTY**

FISCAL YEAR: **2023-2024**

QUARTER: **FOURTH**

SUPPORTIVE HOUSING SERVICES

QUARTERLY REPORT TEMPLATE DRAFT

*The following information should be submitted **45 calendar days after the end of each quarter**, per IGA requirements. When that day falls on a weekend, reports are due the following Monday.*

	Q1	Q2	Q3	Q4
Report Due	Nov 15	Feb 15	May 15	Aug 15
Reporting Period	Jul 1 – Sep 30	Oct 1 – Dec 31	Jan 1 – Mar 31	Apr 1 – Jun 30

Please do not change the formatting of margins, fonts, alignment, or section titles.

Section 1. Progress narrative

*In no more than 3-5 pages, please tell us about your investments and programming during the reporting period, focusing on at least one of the following topics per quarter: **racial equity, capacity building, regional coordination and behavioral health, new investments, leverage, service systems coordination** or any other topic connected to your local implementation plan Please also provide updates and information (including numbers or data) to demonstrate progress towards your work plan goals. Note that each topic/work plan goal must be covered in at least one quarterly report during the year.*

[Example, if you set an annual goal to increase culturally specific provider organizations by 15%, please tell us by quarter 2 how much progress you've made towards that goal (e.g. 5%)]

*Please also address these areas in **each quarter's** narrative.*

- Overall challenges and barriers to implementation
- Opportunities in this quarter (e.g. promising findings in a pilot)
- Success in this quarter (e.g. one story that can represent overall success in this quarter)
- Emerging challenges and opportunities with service providers

Quarter Four Summary:

As Washington County's Homeless Services Division's Supportive Housing Services closed outs its third year of operation, attention and efforts continued to focus on system improvements and the launch of new programs and initiatives. Below is a summary of successes, challenges, system improvements, and new initiatives from quarter four.

1. **Program Successes**

In May, Washington County **launched its RLRA-Only Program** which is a rental-assistance-only program for households currently enrolled in the County's Housing Case Management Services Program receiving both rental assistance via RLRA and supportive case management services who are ready to transition to a lower level of care and indicate that they are no longer in need of supportive case management services, but do not yet have sufficient income to maintain housing without assistance. Households are identified as eligible for graduation from case management services through a tailored assessment that measures the achievement of specific stability benchmarks. As the program launched in quarter four, 64 households were referred to the RLRA-only program and 6 were enrolled at the close of the quarter.

The **Housing Careers Program** continues to provide workforce development support and opportunities for folks with lived experience of homelessness and housing instability. This program serves primarily Population B individuals and provides internship opportunities across a variety of homeless services providers in Washington County.

The Homeless Services Division provided an update on the **Access Centers Capital Notice of Funding Offering (NOFO)** that was released in quarter three to make strategic investments in up to four access centers that will be geographically distributed across Washington County. In quarter four, the Division awarded capital funds for two future access centers in Tigard and Hillsboro totaling $10 million the construction of permanent access center sites. As work gets underway, the Division anticipates permanent access centers will open in 2025 and 2026 to provide walk-in services where individuals experiencing or at risk of homelessness can get connected to housing and social services, access basic hygiene items and support, and stay cool or warm during inclement weather events. The NOFO did not include the allocation of funds for site operations and services. However, the solicitation did note that Washington County would allocate operational contracts for access center capital fund recipients at a later date.

Washington County's **Eviction Prevention program met its target household goal** three times over by the close of quarter four. In quarter four alone, 491 households were served with eviction prevention assistance. The County's program year goal is 500 households total, it was more than tripled with 1,568 households being served at year-end.

2. **System Improvements**

In quarter four, the Division launched **monitoring of the Supportive Housing Services funded Enhanced Rapid Rehousing (ERRH) Program**. The monitoring framework was developed to be complementary of the

existing Continuum of Care monitoring framework to streamline monitoring efforts in program years to come. Four ERRH partners were randomly selected to pilot the monitoring project and desk and site monitoring was conducted across May and June. The Division gathered robust feedback from partners to inform the refinement of the monitoring tool and plans to launch comprehensive monitoring across all SHS-funded housing programs in fall 2024.

The county also launched two more subcommittees of the **Homeless Solutions Advisory Council,** our new one governance structure. The Solutions Council provides oversight and guidance to the County's homeless services system of care with five subcommittees: Performance Evaluation (launched in Q3), Equitable Procurement (launched in Q4), Lived Experience (launched in Q4), Homeless Information Management System (launching PY4), and Coordinated Entry (launching PY4).

Finally, Washington County launched an **equity training series** for all contracted community-based organizations providing homeless services in the fourth quarter. The training series aims to cover a variety of relevant topics including the history of inequities in the housing system, the intersectionality of trauma-informed care and equity, and addressing unconscious bias among other topics. These trainings seek to engage staff across all levels of the organizations and will continue throughout the calendar year and beyond. Equity training engagement data will be included in Washington County's annual report later this fall.

3. Challenges and Opportunities

At the close of the fourth quarter, the Homeless Services Division lagged on yearend housing placement goals. As programs are maturing and reaching full enrollment, adjustments were needed to shift from a focus on program enrollment to housing placements and ensure the system was responsive to serving harder to house households. A variety of **interventions were implemented in quarter four** to support the acceleration of housing placements. These interventions included issuing policy updates for all housing programs to increase the number of enrollments that result in placements, streamlining the RLRA application process, directing additional county staff time to application processing, and increasing clarity and efficiency in submitting housing applications. While these improvements will aid in the system's placement performance long-term, they were not implemented soon enough to make up for lagging placements in previous quarters to reach our year-end goals.

However, Washington County saw 440 households housed through supportive housing this year (goal: 500 households) and 252 households housed through Rapid Rehousing this year (goal: 300 households), demonstrating with our recent process improvements, we should be on track to meet future housing placement goals in PY4. These unmet goals are further offset by the gains made over the last year in shelter expansion and eviction prevention.

Move-in Only is a new short-term intervention to assist homeless or at-risk households to secure housing that they will maintain independently without ongoing case management or rent assistance support from a homeless services program. The goal of this program is to quickly support Population B households without waiting for enrollment in a longer-term program prioritized for higher acuity households. In the first year, the program supported 12 households to secure a home, which is well below the intended goal

of the program (200 households). Program adjustments are needed to more quickly identify and engage households that meet program eligibility. While data reflects that the need exists in our community, these households have not sought assistance through our system's traditional pathways. Washington County has identified new access points to engage eligible households and is working to ensure a higher rate of placements through this diversion program in year 4. These placements are reflected below as part of the **Rapid Re-Housing & Short-term Rent Assistance** reporting category.

As the Division looks ahead, additional process improvement activities include increased focus with provider agencies on their housing placement performance metrics, and the implementation of performance improvement plans for underperforming organizations. Washington County has begun to more closely monitor the application pipeline as well as week-over-week housing placement rates across the homeless services system to continuously evaluate for program efficacy and implement needed system improvements.

4. Financial Analysis

As discussed by the three counties and Metro, the fourth quarter financial report will be submitted on or before August 30th in an effort to ensure all relevant year-end fiscal data is reflected in the report. The early analysis reflects that Washington County continues to **exceed quarter four spending targets** for the amended 2023-2024 fiscal year budget. Of note, the Division has programmed the use of Regional Strategic Investment Funds (RIF) in a variety of areas. These funds support a variety of projects that center on advancing Tri-County Planning Body goals. Funds spent include projects in the regional Landlord Recruitment and Retention Implementation Plan, technical assistance and capacity building efforts directly supporting community-based partners delivering homeless services, Coordinated Entry system analysis and improvements, and health and housing system integration efforts. Total funds allocated to RIF activities will be reflected in the Division's Q4 financial report at the end of August.

Equity Analysis

The Homeless Services Division has been using REALD categories for race and ethnicity since 2022 which contains a similar category for Middle Eastern and North African. The Division trains partners on how to transfer REALD data to HUD data and provides an explanation of each category when conducting trainings on the County's Community Connect assessment. Training materials were updated at the time of the HUD data standards update. Given that the Division implemented the addition of Middle Eastern or North African in quarter three, there is limited data in the reporting category to date. As the next program year gets underway, Washington County anticipates additional data for this new category will be available.

As the Homeless Services Division closes out the program year, there are a variety of equity outcome updates. Washington County will provide a more comprehensive annual equity analysis in its annual report which will be submitted to Metro this fall. This overview will provide a more thorough review of equity impacts throughout the fiscal year.

Section 2. Data and data disaggregation

Please use the following table to provide and disaggregate data on Population A, Population B housing placement outcomes and homelessness prevention outcomes. Please use your local methodologies for tracking and reporting on Populations A and B. You can provide context for the data you provided in the context narrative below.

Data disclaimer:

HUD Universal Data Elements data categories will be used in this template for gender identity and race/ethnicity until county data teams develop regionally approved data categories that more accurately reflect the individual identities.

Section 2.A Housing Stability Outcomes: Placements & Preventions

Housing Placements By Intervention Type: Supportive Housing

# housing placements – supportive housing*	This Quarter		Year to Date	
	#	%	#	%
Total people	149		690	
Total households	102		440	
Race & Ethnicity				
Asian or Asian American	4	3%	18	3%
Black, African American or African	11	7%	83	12%
Hispanic or Latin(a)(o)(x)	39	26%	166	24%
American Indian, Alaska Native or Indigenous	4	3%	46	7%
Native Hawaiian or Pacific Islander	8	5%	29	4%
Middle Eastern or North African	0	0%	4	1%
White	102	68%	467	68%
Non-Hispanic White (subset of White category)	86	61%	380	58%
Client Doesn't Know	1	1%	3	0%
Client Refused	0	0%	12	2%
Data Not Collected	6	4%	16	2%
Disability status				
	#	%	#	%
Persons with disabilities	105	70%	466	68%
Persons without disabilities	29	19%	138	20%
Disability unreported	15	10%	86	12%
Gender identity				
	#	%	#	%
Male	74	50%	327	47%
Female	68	46%	331	48%
A gender that is not singularly 'Male' or 'Female'	5	3%	15	2%
Transgender	2	1%	9	1%
Questioning	0	0%	0	0%

Client doesn't know				
Client refused	0	0%	3	0%
Data not collected	1	1%	9	1%

Supportive housing = permanent supportive housing and other service-enriched housing for Population A such as transitional recovery housing

Housing Placements By Intervention Type: Rapid Re-Housing & Short-term Rent Assistance

# housing placements – RRH**	This Quarter		Year to Date	
	#	%	#	%
Total people	129		551	
Total households	63		264	
Race & Ethnicity				
Asian or Asian American	1	1%	11	2%
Black, African American or African	12	9%	63	11%
Hispanic or Latin(a)(o)(x)	49	38%	207	38%
American Indian, Alaska Native or Indigenous	1	1%	28	5%
Native Hawaiian or Pacific Islander	7	5%	28	5%
Middle Eastern or North African	0	0%	3	1%
White	76	59%	357	65%
Non-Hispanic White (subset of White category)	51	45%	244	47%
Client Doesn't Know	0	0%	3	1%
Client Refused	2	2%	10	2%
Data Not Collected	13	10%	17	3%
Disability status				
	#	%	#	%
Persons with disabilities	51	40%	205	37%
Persons without disabilities	61	47%	283	51%
Disability unreported	17	13%	63	11%
Gender identity				
	#	%	#	%
Male	49	38%	246	45%
Female	76	59%	294	53%
A gender that is not singularly 'Male' or 'Female'	3	2%	7	1%
Transgender	0	0%	4	1%
Questioning	0	0%	1	0%
Client doesn't know				
Client refused	0	0%	0	0%
Data not collected	1	1%	1	0%

*** RRH = rapid re-housing or short-term rent assistance programs*

Housing Placements By Intervention Type: Other Permanent Housing Programs (if applicable)

If your county does not have Other Permanent Housing, please write N/A: _____

# housing placements – OPH***	This Quarter		Year to Date	
	#	%	#	%
Total people	*6*		*6*	
Total households	*6*		*6*	
Race & Ethnicity				
Asian or Asian American	*0*	*0%*	*0*	*0%*
Black, African American or African	*1*	*17%*	*1*	*17%*
Hispanic or Latin(a)(o)(x)	*0*	*0%*	*0*	*0%*
American Indian, Alaska Native or Indigenous	*0*	*0%*	*0*	*0%*
Native Hawaiian or Pacific Islander	*0*	*0%*	*0*	*0%*
Middle Eastern or North African	*0*	*0%*	*0*	*0%*
White	*5*	*83%*	*5*	*83%*
Non-Hispanic White (subset of White category)	*5*	*83%*	*5*	*83%*
Client Doesn't Know	*0*	*0%*	*0*	*0%*
Client Refused	*0*	*0%*	*0*	*0%*
Data Not Collected	*0*	*0%*	*0*	*0%*
Disability status				
	#	*%*	*#*	*%*
Persons with disabilities	*5*	*83%*	*5*	*83%*
Persons without disabilities	*1*	*17%*	*1*	*17%*
Disability unreported	*0*	*0%*	*0*	*0%*
Gender identity				
	#	*%*	*#*	*%*
Male	*1*	*17%*	*1*	*17%*
Female	*5*	*83%*	*5*	*83%*
A gender that is not singularly 'Male' or 'Female'	*0*	*0%*	*0%*	*0%*
Transgender	*0*	*0%*	*0%*	*0%*
Questioning	*0*	*0%*	*0%*	*0%*
Client doesn't know	*0*	*0%*	*0%*	*0%*
Client refused	*0*	*0%*	*0%*	*0%*
Data not collected	*0*	*0%*	*0%*	*0%*

*** OPH = other permanent housing programs (homeless preference units, rent assistance programs without services) that your system operates and SHS funds

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on Housing Placements.

[enter narrative here]

Eviction and Homelessness Prevention

# of preventions	This Quarter		Year to Date	
	#	%	#	%
Total people	1409		4457	
Total households	491		1568	
Race & Ethnicity				
Asian or Asian American	51	4%	154	3%
Black, African American or African	204	14%	676	15%
Hispanic or Latin(a)(o)(x)	752	53%	2097	47%
American Indian, Alaska Native or Indigenous	29	2%	104	2%
Native Hawaiian or Pacific Islander	21	1%	191	4%
Middle Eastern or North African	14	1%	29	1%
White	819	58%	2769	62%
Non-Hispanic White (subset of White category)	423	31%	1493	34%
Client Doesn't Know	0	0%	2	0%
Client Refused	2	0%	6	0%
Data Not Collected	28	2%	45	1%
Disability status				
	#	%	#	%
Persons with disabilities	64	5%	246	6%
Persons without disabilities	201	14%	675	15%
Disability unreported	1144	81%	3536	79%
Gender identity				
	#	%	#	%
Male	630	45%	2011	45%
Female	764	54%	2419	54%
A gender that is not singularly 'Male' or 'Female'	0	0%	7	0%
Transgender	4	0%	7	0%
Questioning	1	0%	1	0%
Client doesn't know				
Client refused	0	0%	0	0%
Data not collected	10	1%	13	0%

Section 2.B Regional Long-Term Rent Assistance Program
The following data represents a **subset** of the above Housing Placements data. The Regional Long-term Rent Assistance Program (RLRA) primarily provides permanent supportive housing to SHS priority Population A clients (though RLRA is not strictly limited to PSH or Population A).

RLRA data is not additive to the data above. Housing placements shown below are duplicates of the placements shown in the data above.

*Please disaggregate data for the **total number of people in housing using an RLRA voucher** during the quarter and year to date.*

Regional Long-term Rent Assistance Quarterly Program Data	This Quarter		Year to Date	
	#	%	#	%
Number of RLRA vouchers issued during reporting period	112		393	
Number of people newly leased up during reporting period	146		686	
Number of households newly leased up during reporting period	89		394	
Number of people in housing using an RLRA voucher during reporting period	2048		2147	
Number of households in housing using an RLRA voucher during reporting period	1187		1262	
Number of people in housing using an RLRA voucher since July 1, 2021	2253		2253	
Number of households in housing using an RLRA voucher since July 1,2021	1331		1331	
Race & Ethnicity				
Asian or Asian American	26	1.3%	28	1.3%
Black, African American or African	267	10.8%	286	11.0%
Hispanic or Latin(a)(o)(x)	591	22.0%	613	21.6%
American Indian, Alaska Native or Indigenous	131	6.1%	135	6.1%
Native Hawaiian or Pacific Islander	89	3.1%	90	3.0%
White	1623	83.2%	1701	83.1%
Non-Hispanic White (subset of White category)	1037	60.3%	1090	60.5%
Client Doesn't Know	0	0.0%	0	0.0%
Client Refused	0	0.0%	0	0.0%
Data Not Collected	0	0.0%	0	0.0%
Disability status				
	#	%	#	%
Persons with disabilities	953	80.3%	1014	80.3%
Persons without disabilities	234	19.7%	248	19.7%
Disability unreported	0	0.0%	0	0.0%
Gender identity				
	#	%	#	%
Male	534	45.0%	574	45.5%
Female	635	53.5%	668	52.9%
A gender that is not singularly 'Male' or 'Female'	16	1.3%	18	1.4%
Transgender	2	0.2%	2	0.2%
Questioning	0	0.0%	0	0.0%
Client doesn't know	0	0.0%	0	0.0%
Client refused	2	0.2%	2	0.2%
Data not collected	0	0.0%	0	0.0%

Definitions:

Number of RLRA vouchers issued during reporting period: Number of households who were issued an RLRA voucher during the reporting period. (Includes households still shopping for a unit and not yet leased up.)

Number of households/people newly leased up during reporting period: Number of households/people who completed the lease up process and moved into their housing during the reporting period.

Number of households/people in housing using an RLRA voucher during reporting period: Number of households/people who were in housing using an RLRA voucher at any point during the reporting period. (Includes (a) everyone who has been housed to date with RLRA and is still housed, and (b) households who became newly housed during the reporting period.)

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on the RLRA program.

[enter narrative here]

Section 2.C Subset of Housing Placements and Preventions: Priority Population Disaggregation

The following is a **subset** of the above Housing Placements and Preventions data (all intervention types combined), which represents housing placements/preventions for SHS priority population A.

Population A Report	This Quarter		Year to Date	
	#	%	#	%
Population A: Total **people** placed into permanent housing/preventions	218		820	
Population A: Total **households** placed into permanent housing/preventions	144		551	
Race & Ethnicity				
Asian or Asian American	5	2%	11	1%
Black, African American or African	17	8%	106	13%
Hispanic or Latin(a)(o)(x)	70	32%	212	26%
American Indian, Alaska Native or Indigenous	6	3%	60	7%
Native Hawaiian or Pacific Islander	12	6%	30	4%
Middle Eastern or North African	0	0%	3	0%
White	153	70%	586	71%
(Subset of White): Non-Hispanic White	111	51%	449	55%
Client Doesn't Know	1	0%	2	0%
Client Refused	1	0%	16	2%
Data Not Collected	8	4%	16	2%
Disability status				
	#	%	#	%
Persons with disabilities	148	68%	589	72%
Persons without disabilities	58	27%	167	20%

Disability unreported	12	6%	64	8%
Gender identity				
	#	%	#	%
Male	95	44%	366	45%
Female	117	54%	426	52%
A gender that is not singularly 'Male' or 'Female'	5	2%	12	1%
Transgender	1	0%	11	1%
Questioning	0	0%	0	0%
Client doesn't know				
Client refused	0	0%	3	0%
Data not collected	1	0%	6	1%

The following is a **subset** of the above Housing Placements and Preventions data (all intervention types combined), which represents housing placements and preventions for SHS priority population B.

Population B Report	This Quarter		Year to Date	
	#	%	#	%
Population B: Total **people** placed into permanent housing/preventions	1,522		5018	
Population B: Total **households** placed into permanent housing/preventions	571		1955	
Race & Ethnicity				
Asian or Asian American	51	2%	175	3%
Black, African American or African	211	11%	740	14%
Hispanic or Latin(a)(o)(x)	783	49%	2295	45%
American Indian, Alaska Native or Indigenous	29	2%	117	2%
Native Hawaiian or Pacific Islander	31	3%	226	5%
Middle Eastern or North African	14	1%	34	1%
White	884	62%	3108	63%
(Subset of White): Non-Hispanic White	479	36%	1739	37%
Client Doesn't Know	1	0%	7	0%
Client Refused	3	0%	13	0%
Data Not Collected	41	3%	64	1%
Disability status				
	#	%	#	%
Persons with disabilities	80	10%	344	12%
Persons without disabilities	270	37%	1028	37%
Disability unreported	1159	54%	3631	52%
Gender identity				
	#	%	#	%
Male	682	44%	2290	47%

Female	818	55%	2684	53%
A gender that is not singularly 'Male' or 'Female'	5	1%	19	1%
Transgender	5	0%	9	0%
Questioning	1	0%	2	0%
Client doesn't know				
Client refused	0	0%	0	0%
Data not collected	11	1%	17	0%

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided above on Population A/B.

[enter narrative here]

Section 2.D Other Data: Non-Housing Numeric Goals

This section shows progress to quantitative goals set in county annual work plans. Housing placement and prevention progress are already included in the above tables. This section includes goals such as shelter beds and outreach contacts and other quantitative goals that should be reported on a quarterly basis. This data in this section may differ county to county, and will differ year to year, as it aligns with goals set in county annual work plans.

Instructions: Please complete the tables below, as applicable to your annual work plans:

All counties please complete the table below:

Goal Type	Your FY 23-24 Goal	Progress this Quarter	Progress YTD
Shelter Beds	60 New Shelter Beds	N/A	3 Alternative shelter sites, 90 beds added.

If applicable for quarterly reporting, other goals from your work plan, if applicable (e.g. people served in outreach, other quantitative goals)

Goal Type	Your FY 23-24 Goal	Progress this Quarter	Progress YTD

Context narrative (optional): In no more than 500 words, please share any additional context about the data you provided in the above tables.

[enter narrative here]

Section 3. Financial reporting

Please complete the quarterly financial report and include the completed financial report to this quarterly report, as an attachment.

Q4

Due Date: The Quarterly Progress Report is due to Metro within 45 days after the end of each quarter (IGA 7.1.2). The Annual Program Report is due no later than October 31 of each year (IGA 7.1.1).

Metro Supportive Housing Services
Financial Report for Quarterly Progress Report (IGA 7.1.2) and Annual Program Report (IGA 7.1.1)   Q4
Washington County

	SEP-23	DEC-23	MAR-24	ADJ-24	ADJ-24
FY 2023-2024 Q4	7/1/2023	10/1/2023	1/1/2024	4/1/2024	4/1/2024
	9/30/2023	12/31/2023	3/31/2024	6/30/2024	6/30/2024

Financial Report (by Program Category)   COMPLETE THE SECTION BELOW EVERY QUARTER. UPDATE AS NEEDED FOR THE ANNUAL REPORT.

	Annual Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	Total YTD Actuals	Variance Under / (Over)	% of Budget	Comments
Metro SHS Resources									
Metro Beginning Fund Balance	111,634,198	111,634,198				111,634,198	(0)	100%	Adjustment to Beginning Fund Balance to remove GASB 31 Adjustment (Unrealized gains/losses of investments) that is included in Beginning Fund Balance line. Aligns this report with how Metro and other counties account for unrealized gains/losses, while allowing Beginning Fund Balance line to reflect Washington County's financial statements.
Metro Beginning Fund Balance Adjustment		3,839,382				3,839,382	(3,839,382)	N/A	
Metro SHS Program Funds	109,000,000	5,757,975	24,145,380	32,592,707	38,173,750	100,669,811	8,330,189	92%	
Metro SHS Program Funds Adjustment	-			(13,392,342)	15,984,500	2,592,158	(2,592,158)	N/A	*See footnote
Other Grant Funds	-	125,000	-	118	(125,118)	-	-	N/A	Kaiser Foundation and Recuperative costs to be moved out of Fund 221 in Q4.
Interest Earnings	2,000,000	710,519	851,926	925,208	867,047	3,354,701	(1,354,701)	168%	
insert addt'l lines as necessary						-	-	N/A	
Total Metro SHS Resources	222,634,198	122,067,074	24,997,306	20,125,691	54,900,179	222,090,250	543,948	100%	

	Annual Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	Total YTD Actuals	Variance Under / (Over)	% of Budget	Comments
Metro SHS Requirements									
Program Costs									
Activity Costs									
Shelter, Outreach and Safety on/off the Street (emergency shelter, outreach services and supplies, hygiene programs)	9,678,523	1,966,255	5,646,390	954,850	6,603,829	15,171,324	(5,492,801)	157%	
Short-term Housing Assistance (rent assistance and services, e.g. rapid rehousing, short-term rent assistance, housing retention)	21,182,067	2,551,543	2,554,057	4,550,864	15,531,638	25,188,102	(4,006,035)	119%	
Permanent supportive housing services (wrap-around services for PSH)	11,452,584	1,192,911	1,883,955	3,800,623	3,756,563	10,634,051	818,533	93%	
Long-term Rent Assistance (RLRA, the rent assistance portion of PSH)	23,780,824	4,681,118	3,379,701	7,353,610	5,999,651	21,414,080	2,366,744	90%	
Systems Infrastructure (service provider capacity building and organizational health, system development, etc)	1,876,285	873,963	340,259	62,220	744,139	2,020,581	(144,296)	108%	
Built Infrastructure (property purchases, capital improvement projects, etc)	12,943,088	1,563,056	1,914,277	4,429,475	2,838,266	10,745,072	2,198,016	83%	
Other supportive services (recuperative care, workforce projects and other pilot programs)	3,363,179	159,140	1,606,676	1,481,389	(1,143,095)	2,104,110	1,259,069	63%	
Operations (technical, employment, benefits, training and consulting)	3,753,741	645,294	932,504	710,696	9,070	2,297,565	1,456,176	61%	
insert addt'l lines for other activity categories						-	-	N/A	
Subtotal Activity Costs	88,030,291	13,633,278	18,257,818	23,343,728	34,340,061	89,574,886	(1,544,595)	102%	

Service Provider Administrative Costs are reported as part of Program Costs above. Counties will provide details and context for Service Provider Administrative Costs within the narrative of their Annual Program Report.

Administrative Costs [1]	Annual Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	Total YTD Actuals	Variance Under / (Over)	% of Budget	Comments
County Admin: Long-term Rent Assistance	487,351	88,751	68,024	130,724	136,590	424,089	63,262	87%	Administrative Costs for long-term rent assistance equals 2% of Partner's YTD expenses on long-term rent assistance.
County Admin: Other	2,204,081	542,220	145,720	1,078,452	223,098	1,989,490	214,591	90%	Administrative Costs for Other Program Costs equals 3% of total YTD Other Program Costs.
Subtotal Administrative Costs	2,691,432	630,971	213,744	1,209,176	359,688	2,413,579	277,853	90%	

Other Costs									
Regional Strategy Implementation Fund [2]	5,450,000	-	-	692,372	3,468,132	4,160,503	1,289,497	76%	
insert addt'l lines as necessary						-	-	N/A	
Subtotal Other Costs	5,450,000	-	-	692,372	3,468,132	4,160,503	1,289,497	76%	
Subtotal Program Costs	96,171,723	14,264,249	18,471,562	25,245,276	38,167,881	96,148,968	22,755	100%	

	Annual Budget	Q1 Actuals	Q2 Actuals	Q3 Actuals	Q4 Actuals	Total YTD Actuals	Variance Under / (Over)	% of Budget	Comments
Contingency [3]	5,450,000					-	5,450,000	0%	
Stabilization Reserve [4]	16,350,000					-	16,350,000	0%	
Regional Strategy Impl Fund Reserve [2]	8,228,639					-	8,228,639	0%	
RLRA Reserves	-					-	-	N/A	
Other Programmatic Reserves	96,433,836					-	96,433,836	0%	
insert addt'l lines as necessary						-	-	N/A	
Subtotal Contingency and Reserves	126,462,475	-	-	-	-	-	126,462,475	0%	
Total Metro SHS Requirements	222,634,198	14,264,249	18,471,562	25,245,276	38,167,881	96,148,968	126,485,230	43%	
Ending Fund Balance	-	107,802,825	6,525,744	(5,119,584)	16,732,298	125,941,282	(125,941,282)	N/A	This amount does not include contingencies and reserves and any available fund balance that is already committed, assigned and planned to be spent down over the next few FYs.

Fund Balance Adjustment: GASB 31 Adjustment to value investments at fair value: Unrealized gains/(losses)		(3,839,382)
For Metro Reporting, SHS Revenue received in JUL and AUG posted to FY 23-24 (but per auditors, it belongs in FY 24-25)		(15,984,500)
Ending Fund Balance per County Financial Statements		106,117,401

*Metro SHS Program Funds Adjustment: The purpose is to align this report more closely with how Metro, Multnomah County and Clackamas County recognize revenue. Washington County's external auditors recommended that SHS program revenue is recognized when received. For Q3, the Metro SHS Program Funds Adjustment line includes reducing July and August 2023 funds received due to being previously reported in the fund balance. For Q4, the Metro SHS Program Funds Adjustment line includes adding July and August 2024 funds received for inclusion in the Annual Report. Washington County will recognize the July and August 2024 funds received on the Metro SHS Program Funds line in FY 2024-25.

[1] Per IGA Section 3.4.2 ADMINISTRATIVE COSTS, Metro recommends, but does not require, that in a given Fiscal Year Administrative Costs for SHS should not exceed 5% of annual Program Funds allocated to Partner; and that Administrative Costs for administering long-term rent assistance programs should not exceed 10% of annual Program Funds allocated by Partner for long-term rent assistance.

[2] Per IGA Section 8.3.3 REGIONAL STRATEGY IMPLEMENTATION FUND, each County must contribute not less than 5% of its share of Program Funds each Fiscal Year to a Regional Strategy Implementation Fund to achieve regional investment strategies.

[3] Per IGA Section 5.5.4 CONTINGENCY, partner may establish a contingency account in addition to a Stabilization Reserve. The contingency account will not exceed 5% of Budgeted Program Funds in a given Fiscal Year.

[4] Per IGA Section 5.5.3 PARTNER STABILIZATION RESERVE, partner will establish and hold a Stabilization Reserve to protect against financial instability within the SHS program with a target minimum reserve level will be equal to 10% of Partner's Budgeted Program Funds in a given Fiscal Year. The Stabilization Reserve for each County will be fully funded within the first three years.

Non-Displacement (IGA 5.5.1)   ANNUAL FINANCIAL REPORT ONLY

	FY18-19 Budget	FY19-20 Budget	Prior FY Budget	Current FY Budget	Current FY Actuals	Variance from Benchmark	Comments
Current Partner-provided SHS Funds (Partner General Funds) [5]	N/A	794,401	N/A	2,452,400	1,174,046	379,645	*Decrease from FY19-20 amount requires a written waiver from Metro.*
Other Funds [6]	3,875,537	N/A	4,481,259	9,469,356	4,314,335	438,798	*Explain significant changes from FY18-19 Benchmark amount or Prior FY amount.*

[5] Per IGA Section 5.5.1.2 TERMS, "Current Partner-provided SHS Funds" means Partner's general funds currently provided as of FY 2019-20 towards SHS programs within Partner's jurisdictional limits including, but not limited to, within the Region. "Current Partner-provided SHS Funds" expressly excludes all other sources of funds Partner may use to fund SHS programs as of FY 2019-20 including, but not limited to, state or federal grants.

[6] Per IGA Section 5.5.1.1 OTHER FUNDS include, but are not limited to, various state or federal grants and other non-general fund sources. Partner will attempt, in good faith, to maintain such funding at the same levels set forth in Partner's FY 2018-19 budget. However, because the amount and availability of these other funds are outside of Partner's control, they do not constitute Partner's Current Partner-provided SHS Funds for purposes of Displacement. Partner will provide Metro with information on the amount of other funds Partner has allocated to SHS, as well as the change, if any, of those funds from the prior Fiscal Year in its Annual Program Budget.

Due Date: The Quarterly Progress Report is due to Metro within 45 days after the end of each quarter (IGA 7.1.2). The Annual Program Report is due no later than October 31 of each year (IGA 7.1.1).

Metro Supportive Housing Services
Financial Report for Quarterly Progress Report (IGA 7.1.2) and Annual Program Report (IGA 7.1.1)
Washington County
FY 2023-2024 Q4

Spend-Down Report for Program Costs
This section compares the spending plan of Program Costs in the Annual Program Budget to actual Program Costs in the Financial Report.

Program Costs *(excluding Built Infrastructure)*	% of Spending per Quarter			Comments
	Budget	Actual	Variance	*Explain any material deviations from the Spend-Down Plan, or any changes that were made to the initial Spend-Down Plan.* [1]
Quarter 1	15%	15%	0%	Per guidance from Metro, Program Cost spend-down budget adjusted to match actuals for first three quarters after budget amendment.
Quarter 2	20%	20%	0%	
Quarter 3	25%	25%	0%	
Quarter 4	25%	42%	-17%	
Total	85%	103%	-18%	Less spent in Built-Infrastructure (as a result of more operational costs).

Built Infrastructure	$ Spending YTD			Comments
	Budget	Actual	Variance	*Provide a status update for below. (required each quarter)*
Annual total	12,943,088	10,745,072	2,198,016	

[1] A "material deviation" arises when the Program Funds spent in a given Fiscal Year cannot be reconciled against the spend-down plan to the degree that no reasonable person would conclude that Partner's spending was guided by or in conformance with the applicable spend-down plan.

Spend-Down Report for Carryover
This section compares the spending plan of investment areas funded by carryover to actual costs.
These costs are also part of the Spend-Down Report for Program Costs above. This section provides additional detail and a progress update on these investment areas.

Carryover Spend-down Plan	$ Spending by investment area			Comments
	Budget	Actual[2]	Variance	*Provide a status update for each line below. (required each quarter)*
Metro Beginning Fund Balance (carryover balance)	111,634,198	115,473,580	(3,839,382)	GASB 31 unrealized loss is not recognized on Metro reporting (per Metro guidelines).
Describe investment area				
Shelter Capital Funding	22,000,000	9,225,256	12,774,744	Shelter Capital Grants (POs 190269, 190805, 191001, 191781, 191953, 191984, 192020, 192408, 192923).
Rent Assistance Expansion	10,000,000	13,137,052	(3,137,052)	Eviction Prevention Contracts with Community Action Organization and Centro Cultural (POs 191471, 191943).
Capacity Building	2,500,000	1,060,695	1,439,305	Technical Assistance and Capacity Building Grants (POs 190869, 190880, 190881, 190958, 190961, 190962, 190972, 190992, 191032, 191235, 191662, 191670, 191884, 191889, 191938, 191964, 192193, 192294, 192296, 192316, 192338, 192341, 192358, 192376, 192378, 192676).
Supportive Housing Acquisition	17,000,000	1,628,368	15,371,632	Heartwood Common Stabilization (192462) and Elm Street (WIRE, 190129, 190283, 190338, 191963, 192613).
Access Center Capital Construction	5,000,000		5,000,000	Projects committed but work and spending delayed until FY 24-25.
Center for Addiction Triage & Treatment	1,500,000	1,500,000	-	Center for Addiction Triage and Treatment.
insert addt'l lines as necessary			-	
	58,000,000	26,551,372	31,448,628	
Remaining prior year carryover	53,634,198	88,922,208	(35,288,010)	
Ending Carryover Adj. (Projected Unspent Program Expense)	12,939,399	(22,755)	12,962,154	Projected as 15% unspent projected program expenses.. Actual unspent amount is less than 1%.
Ending Carryover Adj. (Δ between Dec 2022 and Aug 2023 Rev. Forecast)	27,201,667	21,057,330	6,144,337	New Metro SHS Revenue Projection Δ.
FY 25 revenue rollback	-	15,984,500	(15,984,500)	Two extra months of revenue (JUL-24 and AUG-24) roll into FY 24 to become part of FY 24-25 Carryover (per Metro guidelines).
Metro Ending Fund Balance (carryover balance)	93,775,264	125,941,282	(16,181,519)	
JUL-24 Revenue and AUG-24 Revenue to be part of FY 24-25	-	(15,984,500)	15,984,500	Because July and August 2024 revenues are part of FY 24-25, they do not contribute to FY 23-24 ending fund balance carryover.
GASB 31 Unrealized Loss	-	(3,839,382)	3,839,382	GASB 31 Unrealized Loss (adjustment to bridge the gap between investment revenues and portfolio balance at June 2023) is to be recognized per audit recommendation.
Estimated Available Fund Balance for next FY planned Investment	93,775,264	106,117,401	(197,019)	Ending fund balance per County Financial Records
Contingency	(5,450,000)	(5,750,000)	300,000	Per Metro guidance - should be 5% of budgeted revenue. Per Metro Oct 25, 2023 projection, revenue for FY 24-25 is estimated to be $115m.
Stabilization Reserve	(16,350,000)	(17,250,000)	900,000	Per Metro guidance - should be no less than 10% of budgeted revenue. Per Metro Oct 25, 2023 projection, revenue for FY 24-25 is estimated to be $115m.
Regional Strategy Impl Fund Reserve	(8,228,639)	(9,814,333)	1,585,694	Cumulative Regional Strategy Implementation Fund set aside to be spent per Metro directive. Per next FY budget, this amount is expected to be $9.8m.
Estimated Available Fund Balance for planned Investments	63,746,625	73,303,068	1,002,981	This amount is committed, assigned and planned to be spent over the next multiple years. This amount is an estimate because next FY will have different reserve figures (based on Metro's projected revenue for FY 24-25).

[2] If the actual costs for any carryover investment areas are not tracked separately from existing program categories, use the Comments section to describe the methodology for determining the proportion of actual costs covered by carryover. For example: if service providers received a 25% increase in annual contracts for capacity building, and the costs are not tracked separately, the capacity building portion could be estimated as 20% of total actual costs (the % of the new contract amount that is related to the increase).

**5.2 Presentation of Performance Measures
Audit Results**
Other Business

Metro Council Meeting
Thursday, September 19, 2024

Performance Measures:
Utilize best practices to monitor progress towards goals

Why this audit is important

Performance measures are a critical component of the processes and systems organizations use to achieve their objectives. Audits published by our office in recent years identified the need for improved performance measurement systems. Metro's financial policies require the annual budget to include performance measures.

Being able to measure progress towards goals is a foundational element of building trust in government. The Government Finance Officers Association (GFOA) has developed best practice guidance for performance measurement. Their guidance directs governments to identify, track, and communicate performance measures internally and externally. Measure types include input, output, efficiency, service, and outcomes.

Effective performance measures include a variety of data points to monitor progress towards goals
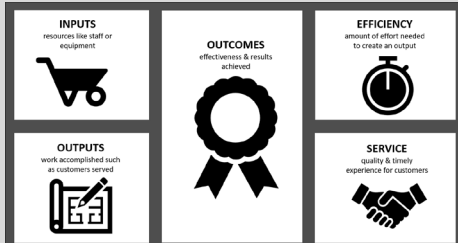
Source: Auditor created from GFOA and Government Accounting Standards Board reports

What we found

Metro's approach to performance measures was fragmented. Several strategic frameworks and associated performance measures were created in the past, but they were not sustained. Several barriers have prevented Metro from using performance measures consistently, including unclear expectations, organizational culture, and internal capacity.

One of the root causes was that the mandate for performance measurement was underdeveloped. Metro's financial policies require budget performance measures, but there was no other guidance about what was expected. Budgets from FY2020-21 through FY2023-24 did not include performance measures.

Although the financial policy was not followed, some departments and venues continued to track and report measures in other documents. We found some of these measures could be useful for meeting the policy requirement by making greater use of best practices.

More work is needed to align performance measures with best practices

Source: Auditor analysis of GFOA documents and a sample of performance measures included in Metro budgets prior to FY2024-25, program progress reports, and annual reports.

Improvements in the following areas would increase the value of performance measures for decision-makers and the public:
- Clarify regional goals.
- Determine the most appropriate performance measures to use for each regional, program, and organizational goal.
- Increasing the types of measures used.
- Set performance targets and monitor trends over time.
- Standardize reporting practices.

What we recommend

The audit included six recommendations. Two focused on refining Metro's financial policy to make greater use of best practices related to benchmarking, trend analysis, and reporting. Four recommendations were made to algin department and venue practices with the financial policy and related performance measurement guidance.

Performance Measures:

Utilize best practices to monitor progress towards goals

September 2024
A Report by the Office of the Auditor

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MEMORANDUM

September 4, 2024

To: Lynn Peterson, Council President
     Ashton Simpson, Councilor, District 1
     Christine Lewis, Councilor, District 2
     Gerritt Rosenthal, Councilor, District 3
     Juan Carlos González, Councilor, District 4
     Mary Nolan, Councilor, District 5
     Duncan Hwang, Councilor, District 6

From: Brian Evans. Metro Auditor

Re: Audit of Performance Measures

This report covers the audit of performance measures. Performance measures are a critical component of the processes and systems organizations use to achieve their objectives. The purpose was to determine what was preventing Metro from complying with its financial policy to include performance measures in the annual budget.

We found Metro's approach to performance measures was fragmented. Several strategic frameworks and associated performance measures were created in the past, but they were not sustained. One of the root causes was that the mandate for performance measurement was underdeveloped. Financial policies require budget performance measures, but there was no other guidance about what was expected.

The eight departments and venues we analyzed for this audit regularly track performance measures. However, we found room for improvement in several areas. Metro can utilize previous work while making improvements over time to better align its measures with best practices.

We have discussed our findings and recommendations with Marissa Madrigal, COO; Andrew Scott, Deputy COO; Josh Harwood, Fiscal and Tax Policy Director; and Jane Marie Ford, Performance Data and Policy Manager. I would like to acknowledge and thank all the people who assisted us in completing this audit.

Summary

Performance measures are a critical component of the processes and systems organizations use to achieve their objectives. Audits published by our office in recent years identified the need for improved performance measurement systems in various parts of Metro's operations.

This audit found Metro's approach to performance measures was fragmented. One of the root causes was that the mandate for performance measurement was underdeveloped. Metro's financial policies require budget performance measures, but there was no other guidance about what was expected.

There appeared to be three layers of performance measures that were somewhat consist throughout the various performance measure initiatives we reviewed during the audit. Regional, budget, and operational measures each provided information that was relevant to different stakeholders. Alignment between each layer was needed to get value from performance measures.

Metro's current focus on performance measures is centered around the Strategic Targets initiative. However, our analysis found that the Strategic Targets do not encompass most of Metro's functions and goals. About one-third of goals, metrics, and targets showed direct alignment with the Strategic Targets.

Metro can utilize previous work while making improvements over time to better align measures with best practices. The eight departments and venues we analyzed for this audit regularly track performance measures. However, we found the value of their measures varied. Some provided valuable data points to track progress towards goals, while others were more general which reduced their value.

We found room for improvement in several areas. Goals were mostly clear, but some contained terms and concepts that were more vague or open to interpretation. A limited number of performance measures contained substantial alignment with goals. We identified measures for around of 40% of reported goals which left about 60% of the goals with no performance measure. This suggested that progress was either not being measured or not being reported. Most measures tracked outputs with infrequent measurement of outcomes, service quality, and efficiency.

The audit included six recommendations. Two focused on refining Metro's financial policy to make greater use of best practices related to benchmarking, trend analysis, and reporting. Four recommendations were made to algin department and venue practices with the financial policy and related performance measurement guidance.

Background

Metro's financial policies require the annual budget to include performance measures. The budget defines performance measures as quantifiable measures of effectiveness. Their purpose is to measure the impact of specific efforts in achieving program goals.

Performance measures are a critical component of the processes and systems organizations use to achieve their objectives. They help organizations manage risk and report on their service efforts and accomplishments. Being able to measure progress towards goals is a foundational element of building trust in government.

Performance measure types include input, output, efficiency, service, and outcomes. The Government Finance Officers Association (GFOA) has developed best practice guidance for performance measurement. Their guidance directs governments to identify, track, and communicate performance measures internally and externally. Performance measures are used to make informed decisions by collecting information about operational activities, achievement of goals, and community conditions that are intended to be addressed.

Exhibit 1   **Effective performance measures include a variety of data points to help monitor progress towards goals**
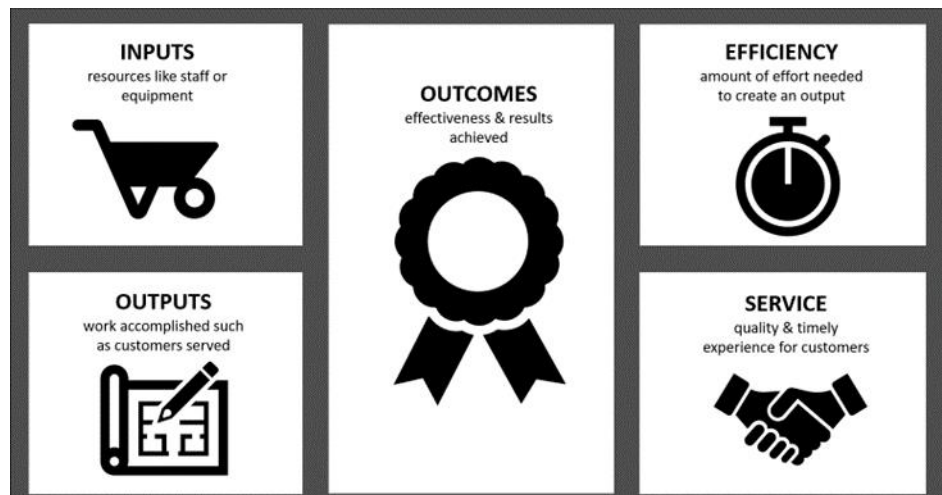
Source: Auditor's Office created from GFOA and Government Accounting Standards Board reports.

In 2014, our office published an audit of the performance measures included in Metro's budget. The audit compared Metro's performance measures to best practices. It found about two-thirds of the measures were not relevant in assessing Metro's goals.

The 2014 audit looked at what types of performance measures were used. At that time departments were mostly tracking inputs and outputs, which did not give the public information about the effectiveness and efficiency of their work.

The management response to the audit promised to prioritize outcome measures to be responsive to Council and public needs. The response noted that other government agencies also struggle with performance measures and stated Metro's intent to provide leadership for the region's local governments.

Audits published by our office in recent years identified the need for improved performance measurement systems in various parts of Metro's operations. Examples of our recommendations included:

- Create performance measures for each program to provide direction and to create a vision of what success should look like.
- Establish performance goals and set targets for each service type.
- Develop performance measures to evaluate the quality of services provided.

Metro stopped including performance measures in the FY 2019-20 budget. The FY 2022-23 budget included equity outcomes for each organizational unit, but data to measure progress on all of the outcomes was not reported. Although the budget did not include performance measures, many parts of the organization reported on performance in other ways. These included program specific reports and updates on the status of regional plans.

This audit was initiated to determine what was preventing Metro from complying with its financial policy to include performance measures in the annual budget. Our goal was to determine what commitments eight departments and venues had made to the public and assess whether there were associated performance measures that could be included in the budget. Our review included Housing; Parks and Nature; Planning, Development, and Research; Waste Prevention and Environmental Services; Oregon Convention Center; Portland'5 Centers for the Arts; and Portland Expo Center.

Results

We found Metro's approach to performance measures was fragmented. Several strategic frameworks and associated performance measures were created in the past, but they were not sustained. Several barriers have prevented Metro from using performance measures consistently, including unclear expectations, organizational culture, and internal capacity.

One of the root causes was that the mandate for performance measurement was underdeveloped. Metro's financial policies require budget performance measures, but there was no other guidance about what was expected. Budgets from FY 2020-21 through FY 2023-24 did not include performance measures. Although the financial policy was not followed, some departments and venues continued to track and report measures in other documents.

We found some of these measures could be useful for meeting the policy requirement by making greater use of best practices. Improvements in the following areas would increase the value of performance measures for decision-makers and the public:

- Clarify regional goals.
- Determine the most appropriate performance measures to use for each regional, program, and organizational goal.
- Increase the types of measures used to provide a more complete picture of performance.
- Set performance targets and monitor trends over time.
- Standardize reporting practices.

Exhibit 2 **More work is needed to align Metro's performance measures with best practices**

	BEST PRACTICE	Clear Goals	Performance Measures	Performance Targets	Reporting
	FINDING (Metro's context)	most goals are clear with some room for improvement	most goals did not have accompanying performance measures	targets are infrequently published	more timely, complete & consistent reporting is needed

Source: Auditor's Office analysis of GFOA documents and a sample of performance measures included in Metro budgets prior to FY 2024-25, program progress reports, and annual reports.

Metro's approach to performance measures is fragmented

Metro did not follow its financial policy for budget performance measures from FY 2020-21 through FY 2023-24. This reduced transparency for the public and decision-makers about what had been accomplished by departments and venues. It also increased the chances that Metro might not receive the GFOA's Budget Award for high quality transparency and communication. The award has been a point of pride in the past and something that agency leadership seeks to maintain. The GFOA's award letter from 2022 noted that the budget did not satisfy the mandatory performance measures criteria. They asked that it be corrected within two years.

Despite the absence of budget performance measures, departments and venues have tracked and reported measures in other ways. These efforts showed some improvements compared to what we found in our previous audit. The 2014 audit found that a lack of clear goals may have contributed to the quality of the performance measures. Researchers define goal clarity as limiting ambiguity or the opportunity for interpretation. The analysis completed in this audit found better goal clarity for programs, departments, and venues. This suggests that goal clarity may not be the primary barrier to effective performance measures for departments and venues but aligning those goals with regional goals continued to be a challenge.

Although some performance measures are expected to be included in the FY 2024-25 budget when it is published in fall 2024, we found the agency's approach to performance measures was fragmented. Several different budget frameworks were created in recent years. In addition, other initiatives outside the budget process were started to monitor regional performance and internal operations since 2018. Metro also has several regional plans and internal strategic plans at the department and venue level which include performance measures.

These efforts show a commitment to use performance measures, but the number of measures and variety of organizational frameworks reduced effectiveness and efficiency. There appeared to be three levels of performance measures that were somewhat consist throughout all the initiatives. Regional measures focused on the outcomes Metro wants to achieve. Budget measures were intended to connect individual program, department, and venue efforts to the regional outcomes. Operational measures focused internally on the work departments and venues do to accomplish their missions.

Each of these measures were intended to provide information that was relevant to different stakeholders. Regional measures would help the public and Metro Council understand the big picture of how the agency's work was making progress on regional goals. Budget measures could help senior leadership make decisions about how to distribute resources. Operational measures could help managers monitor the effectiveness, efficiency, and equity of their programs and services.

Exhibit 3   Metro's approach to performance measures is intended to provide information to different stakeholders

Source: Auditor's Office analysis of "Metro Performance & Analytics," March 22, 2024 and audit interviews.

Alignment between each layer is needed to get value from performance measures. Our review of past efforts indicated that changes to one layer sometimes led to the re-creation of similar work at other layers. As a result, it appeared that more work was done to identify new measures rather than using performance measure data that was already available.

That pattern created confusion and duplicative efforts over time. For example, in 2016 a new strategic framework was adopted for the agency. It set agency goals and stated that performance measures for each goal would be in place by the end of 2021. A new strategic framework was created in 2022. Other initiatives were started in recent years but were not sustained.

As a result, Metro has various frameworks and measures to draw from. Using previous work can help reduce duplicative efforts. Committing to one framework and refining the associated performance measures over time would help the agency overcome patterns that prevented consistency in the past.

Several strategic frameworks were created

In the past six fiscal years, several strategic frameworks were described in the annual budget. Frequent changes made it difficult to implement any of them fully. The various frameworks could have caused confusion and fatigue among internal and external stakeholders.

Combined, the frameworks included at least twelve groups of principles such as shared prosperity, vibrant communities, and climate change leadership. These principles could be interpreted as regional goals but the volume and potential overlap among them could make it more difficult to find appropriate measures for each.

We heard that leadership had a similar challenge when they attempted to measure progress on some of the prior organization frameworks. For example, the Six Desired Outcomes adopted by Council in 2010 included broad outcomes like *vibrant communities,* which made it difficult to know what to measure.

Exhibit 4   The variety of organizational frameworks and associated principles made it difficult to measure performance

YEARS	FRAMEWORKS - principles #s	PRINCIPLES
FY23-24 FY22-23	Keeping our Promises Build Back Better - #1-3	1. Racial Justice 2. Climate Justice & Resilience 3. Shared Prosperity
FY21-22 FY20-21	Six Desired Outcomes - #4-9	4. Vibrant Communities 5. Equity 6. Clean Air & Water 7. Economic Prosperity 8. Transportation Choices 9. Climate Change Leadership
FY19-20 FY18-19	Six Desired Outcomes Metro Compass - #4-12	10. Leader in Civic Engagement 11. Quality of Life & Environment 12. Services-Relationships- Customer Service-Collaboration

Source: Auditor's Office analysis of Metro adopted budgets from FY 2018-19 to FY 2023-24.

During the FY 2021-22 budget process, Council directed staff to develop equity performance measures to use in future budget processes to guide decisions. Equity outcomes were introduced in the FY 2022-23 budget, which added another lens to evaluate performance. Departments and venues were asked to propose equity outcomes and associated measures, but data to track progress was not always included.

It was not clear if the equity outcomes were intended to be the only performance measures in the budget. For example, the instructions for the FY 2024-25 budget directed departments and venues to included equity performance measures. After proposed budgets were submitted, we were told that departments and venues were also asked to include two to three other budget performance measures to be included in the final budget. Clarifying the role of equity measures in the context of regional, budget, and operational measures would improve the efficiency and effectiveness of the budget process.

Metro has also initiated other performance measure efforts outside of the budget process. We found these were not maintained in recent years. Those approaches included management reports, the Balanced Scorecard and the Regional Barometer. Management reports focused mostly on operational measures and were published from 2009 through 2018. They provided a biannual or quarterly assessment of departments and venues operations. At the end of each fiscal year, a Balanced Scorecard report was created to analyze performance objectives for operations.

We heard there were some challenges with the management reports. Some measures proposed by department and venue management were rejected because leadership felt they were selected based on successes rather than

meaningfulness. We heard that business process measures were especially challenging to agree upon. For example, creating measures to evaluate customer satisfaction was an area of difficulty.

In 2020, Metro launched the Regional Barometer, an online tool to report on how the region was doing in the areas of transportation, economy, ecosystems, climate, communities, and equity. The Regional Barometer efforts were hampered by different challenges, including technology issues, and implementation challenges, during its development process. Managing and updating the data was reported to be burdensome. We heard that the Regional Barometer provided meaningful measures, but many were not in Metro's control and efforts to connect that data to agency programs were challenging. We were told the Regional Barometer would be discontinued in 2024.

Lack of a clear mandate increases the risk of repeating the same patterns

We found that Metro lacked specificity in the guidelines and mandate around performance measures. This appeared to be a root cause of uneven implementation of performance measure initiatives. We did not find specific guidance or requirements other than the budget performance measures policy to guide management's efforts.

Metro's current focus on performance measures is centered around the Strategic Targets initiative. That initiative began in fall 2022, when Council directed staff to develop strategic targets in the areas of environment, economy, and housing. The purpose was to guide future budgeting and policymaking decisions.

A committee of employees was formed, and a consultant was hired to engage with stakeholders and assist with target development. Council approved the resulting targets by resolution in December 2023. Departments were asked to identify performance measures related to the targets for the FY 2024-25 budget.

Exhibit 5 **Performance measures related to Metro's Strategic Targets could be difficult to develop**

Strategic Target	Description
Meeting our Climate & Resilience Goals	In the face of a changing climate, we must reduce GHG emissions, be more sustainable, and build resilience to safeguard nature and people.
A Resilient Economy for All	Position the Metro Region to take advantage of future growth opportunities by helping both people and businesses thrive.
Housing For All	Housing market provides ample housing at all levels and everyone in the region can access services that meet their needs.

*Source: Auditor summary of Council Resolution 23-5362.*

Our analysis found that the three Strategic Targets do not encompass most of Metro's functions and goals. The GFOA recommends that performance measures be developed and used as an important component of long-term plans and decision making. These efforts should be based on program goals and purposes.

During the Strategic Targets development process Council discussed the framework's ability to capture all functions. One risk discussed was that some departments do not have related programs and could be left feeling like what they do is not central to Metro's core mission. For example, lack of direct alignment between Metro's work on parks and natural areas and the *environment* strategic target seemed like a missed opportunity. The alignment between the strategic targets and Metro's work on arts and culture were also mentioned during these discussions.

This initiative appears to provide a partial map to direct commitments agency wide. Our analysis identified seven primary functions for Metro's external department and venues compared to three Strategic Targets areas, leaving several functions unrepresented. The climate target may be served by certain departmental functions such as conservation and planning, but these functions also include other commitments that do not appear closely connected to the climate target.

Even when alignment appeared clear, like the Housing department's work and the *housing* strategic target, some challenges could occur. For example, the department is not focused on housing at all levels as the target specifies. The department's work includes funding for affordable housing construction and homeless services, but these are for specific populations. Homelessness services, another of its function, includes elements other than housing such as wraparound services.

Exhibit 6 **Some of Metro's work does not appear to be aligned with the Strategic Targets**
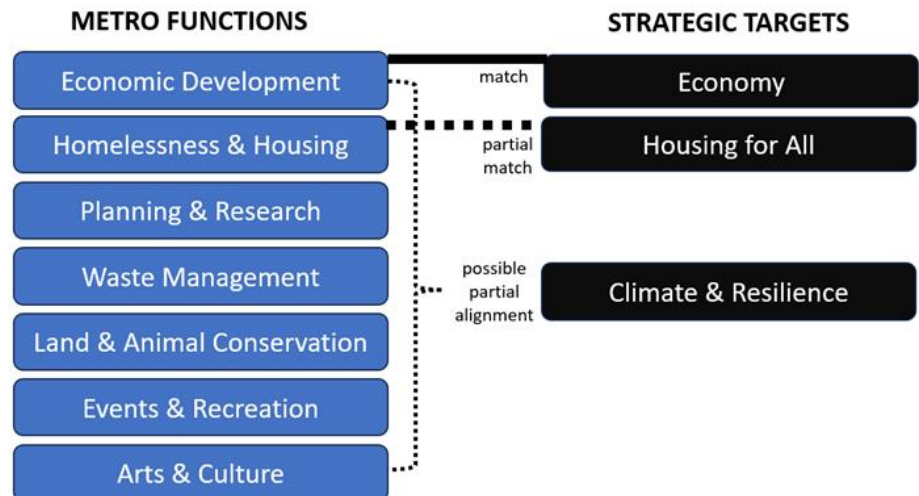
Source: Auditor's Office analysis of Metro budgets prior to FY2024-25, program progress reports, and annual reports.

In our analysis, we compared the Strategic Targets with the existing commitments in eight of Metro's departments and venues. We identified their goals, measures, and targets related to these commitments from budgets prior to FY 2024-25, plans, progress reports, and annual reports. In this sample, about one-third of goals, metrics, and targets showed direct alignment with the Strategic Targets. The economy target appeared to have the greatest alignment with goals and the climate target had the weakest alignment.

Exhibit 7   Most of the sampled performance measures did not have a direct connection to the Strategic Targets

Source: Auditor's Office analysis of a sample of department and venue measures reported in budgets prior to FY 2024-25, program progress reports, and annual reports .

Adequate resources should be prioritized to help ensure long-term commitments Metro has made to the public are met. The Strategic Targets could distract from the need to measure progress towards these existing commitments. The GFOA recommends that the benefits of establishing and using performance measures exceed the resources required to capture them. Focusing exclusively on the Strategic Targets might not provide comprehensive performance measure information, and reduce the time, staffing, and financial resources needed to measure progress toward other commitments.

In addition to lacking a clear mandate for performance measures, other barriers have prevented adoption of an effective and efficient performance measures. These include the organizational cultural around performance measures and evolving responsibilities. Internal capacity also presented challenges.

During the audit, we heard that the organizational culture around performance measurement needs strengthening. This was similar to the conclusions reached in the past. Metro hired a consultant in 2007 to help shift the culture around performance measurement. That project was meant to create a culture that is more accepting of performance measurement, but there had been limited progress at the end of the project.

We heard skepticism about the value of performance measurement efforts, and this was linked to a sense that past efforts at Metro or other local agencies have not been effective. A concern was expressed that performance measurement efforts tend toward collecting data without relevance to the program's performance. We heard that agencies who try to implement performance management systems often fail. Success requires alignment with different levels of decision making. The consistency of performance measurement systems may falter when leadership changes, even at organizations were successful in this area. GFOA recommends that agencies take steps to ensure that the entire organization is receptive to evaluation of performance.

Improvements are needed to increase the value of performance measures

To overcome these barriers and set a new course for performance measures, Metro can utilize previous work while making improvements over time to better align with best practices. For example, the eight departments and venues we analyzed for this audit regularly track performance measures. However, we found the value of their measures varied. Some provided valuable data points to track progress towards goals, while others were more general which reduced their value.

We found room for improvement in several areas. Goals were mostly clear, but there was some room for improvement. A limited number of performance measures contained substantial alignment with goals. Most measures tracked outputs with infrequent measurement of outcomes, service quality, and efficiency. We also did not observe regular use of best practices related to benchmarking, trend analysis, and reporting. Limited use of these practices prevented Metro from getting as much value as it could from the measures.

Increased goal clarity can support measurement

The 2014 performance measures audit noted that the cornerstone of good performance measurement is a set of goals that can be clearly understood. At that time, department goals were often not specifically stated in the budget and were difficult to infer. In this audit, we found improved goal clarity, and continued room for improvement.

Research emphasizes the importance of goal clarity as a foundation for effective measurement and management. Ambiguous goals can make it difficult to develop performance measures. This makes it difficult to evaluate whether goals have been achieved. Clear goals serve to motivate people and communicate priorities in improving performance and accountability.

We analyzed the clarity and measurability of goals for eight departments and venues. In our assessment over, 80% of measures were clear and measurable. Metro's agency-wide initiatives stood out as having the highest proportion of goals with limited clarity and measurability compared to the department and venue goals.

The goals that showed limitations in clarity and measurability tended to use terms and concepts that were more vague or open to interpretation. The use of imprecise language could prevent internal and external stakeholders from

understanding what Metro is trying to achieve. Some of the word choices appear to convey values that may be difficult to define and measure. Other words choices appear to be those used by a particular profession or group and could be difficult for others to understand. Our analysis identified several instances where imprecise language could result in various interpretations.

Exhibit 8   **Words in some goals had unclear meanings that could be modified to create greater precision and clarity**
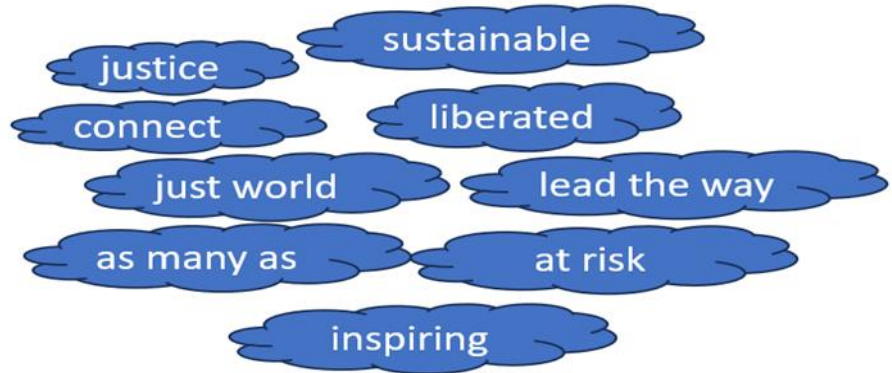
Source: Auditor's Office analysis of Metro budgets prior to FY 2024-25, program plans, progress reports, and annual reports.

Align measures with goals

Our analysis also found the eight departments and venues regularly did not report performance measures that clearly aligned with their stated goals. The GFOA recommends that performance measures be used to assess the achievement of goals. They also note, relevant measures should be clearly linked to the outcomes that they are intended to measure.

In our analysis, we compared the content of goals with the content of measures to assess their alignment. The sample of measures was taken from departments' and venues' most recent progress and annual reports. We identified measures for around of 40% of reported goals which left about 60% of the goals with no performance measure. This suggested that these goals were either not being measured or not being reported on. The alignment of goals with measures varied significantly among departments and venues. One had measures for all goals and others had measures for less than 10% of their goals.

Exhibit 9   Most goals did not have accompanying performance measures, but it varied by department and venue
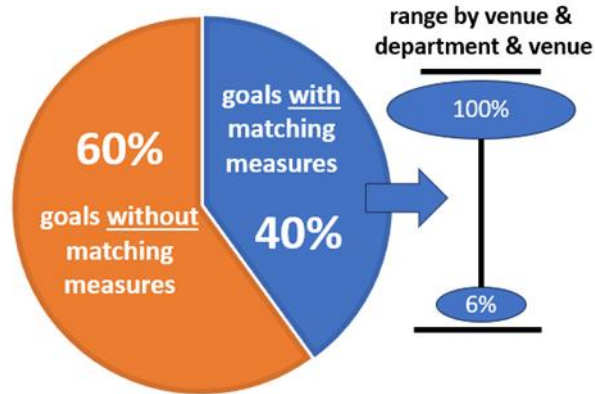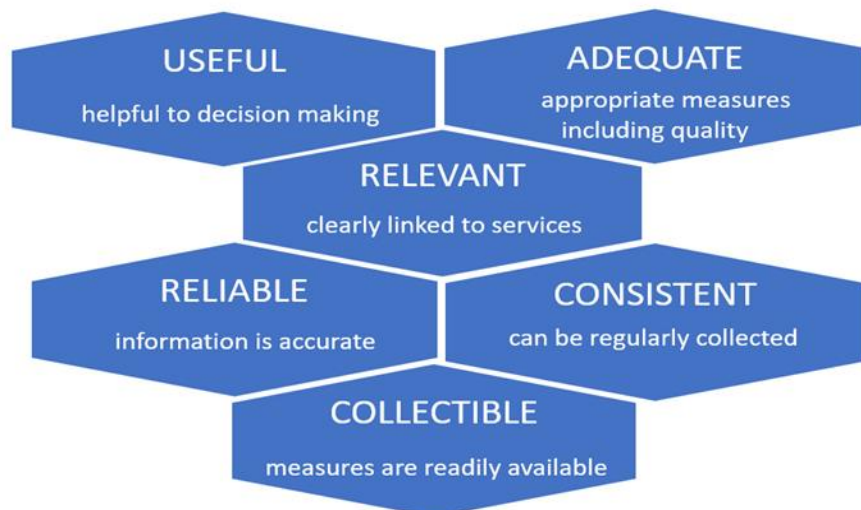

Source: Auditor's Office analysis of a sample of department and venue goals and performance measures included in budgets prior to FY 2024-25, program plans and progress reports, and annual reports.

Without measurement, it was difficult to ensure that goals were being reached. Establishing and reporting measures for all goals can help ensure monitoring and accountability. We also observed data that is tracked which might relate to goals but is not reported to the public. Reporting this data publicly would provide a low-cost way to increase transparency and accountability.

Use best practices to improve understanding

The value of measures could be improved by increasing the use of best practices. GFOA best practices recommend several characteristics of measures including relevance, usefulness, reliability, and adequacy. Utilizing these guidelines could increase the value of measures in reporting progress and informing decision making.

Exhibit 10   GFOA recommends several attributes of performance measures

Source: Auditor's Office generated based on GFOA best practices.

Our analysis of measure quality showed some alignment with GFOA best practices. Departments and venues reported some measures that were useful and relevant. Examples of measures that appeared relevant included attendance and participation numbers. These appeared relevant because they could measure the demand for services and program outputs.

Several weaknesses were also observed. Best practices literature notes that adequacy is the characteristic which ensures that measures evaluate the quality of services and not just the quantity. Metrics to indicate the quality of services were not regularly used. Adding measures of quality could ensure that participants are receiving effective services rather than just a certain quantity of services.

The reliability of measures is key to helping stakeholders understand performance. Reliability might be improved by ensuring that metrics are as accurate as possible. Measures for the economic impact of visitor venues were regularly reported. These appeared to be based on estimates of investments rather than actual data. Using economic impact models could present reliability challenges. The 2014 performance measures audit expressed concerns about the reliance of estimated economic impact versus actual data. Incorporating GFOA best practices into the selection of Metro performance measures could help to increase their quality.

Expand use of outcome measures

Increasing the diversity of measure types could increase their usefulness for performance management. GFOA recommends governments use a mixture of measure types to accomplish various functions. The different types of measures offer different functions and value in measuring performance.

Exhibit 11   **Previous budget performance measures included a variety of types to provide a more complete picture of performance**

Measure Type	Example of Measures Type
OUTPUT	Acres of land acquired for protection each year.
OUTCOME	Material recovery rate.
EFFICIENCY	Ratio of operating income to expenses.
CUSTOMER	Percent satisfied with quality and timeliness.

Source: Auditor's office analysis of Metro's FY 2019-20 Adopted Budget.

Our analysis found infrequent use of efficiency, service quality, and outcome measures. Metro's financial policies do not specify the types of measures that should be used. More specific guidance could ensure the regular use of other types of measures. For example, there were several references to customer satisfaction data, but we did not find this reported. Reporting

relevant data to Council and the public can help improve the transparency and accountability for program performance.

Research emphasizes that outcome measures are often considered the most important type of measure because they show impacts. However, governments are inclined to report outputs and use outcomes measures less frequently for several reasons. They often believe that output measures are more important than outcome measures. Concerns about data availability and the belief that they can only determine outcomes from long-term studies are also factors.

Set performance targets and use benchmarks to help interpret performance data

The budget performance measures for FY 2019-20 set desired target levels to help interpret performance. A target, for example, might be a standard of 85% customer satisfaction. That would help decisions makers know if 75% customer satisfaction was sufficient. In our sample, departments and venues rarely included performance targets.

One possible reason is that Metro's policies do not specify when or how performance targets should be set. GFOA best practices state the multiple benefits of target setting:

- Targets establish a threshold of acceptable performance and provide a standard against which to compare actual results.
- Targets can have motivational value and hold people accountable.
- Without targets, performance measures can be too ambiguous.

We found that half of departments and venues we reviewed used at least one target. However, about 90% of the goals identified in our sample did not include targets. One venue's strategic plan contained several targets, but we did not locate any reporting on the progress of these. We also observed that ballot measures since 2019 did not include targets related to the goals. That left voter-approved initiatives without clear measures to know what promises were made and what would be accomplished.

The management response for the 2014 performance measures audit identified the need to better clarify goals and targets along with reporting functions. It also noted that forecasted targets together with several years of past data can provide both comparative data and future targets. However, not including performance measures and targets in the budget after FY 2019-20 eliminated a mechanism for setting and reporting targets agency-wide. Reestablishing the use of targets in budget performance measures would return the former mechanism for target setting.

The infrequent use of targets could have several adverse effects. Metro sometimes does not have an established standard to know if acceptable performance has been met. The opportunity to utilize the motivation and accountability values of targets is missed. Goals could be more ambiguous than with the inclusion of targets.

Research suggests that Metro should employ a strategy of setting specific and difficult goals, and then monitoring performance toward the target. The

process might include several steps such as selecting measures, reviewing past performance, setting a target, assessing progress toward the target, and adjusting efforts or targets to gradually improve.

Setting attainable goals is a popular approach for goal setting, but it may be an ineffective way to improve performance. Studies show that setting specific and difficult goals leads to significant increases in productivity. Research shows that difficult goals produced the highest levels of effort and performance.

The GFOA recommends agencies periodically review and evaluate the targets used with performance measures. Without careful management, targets can be largely arbitrary, which can distort priorities, lead to inaccurate reporting, and incent behavior that is contrary to an organization's values. These potential downsides suggest the use of targets should be carefully managed.

Trend analysis and benchmarking are recommended practices that could improve Metro's performance measurement efforts. Best practice research suggests that historical trend analysis is an approach used regularly by governments. Historical trend analysis shows if the results are going in a desirable direction. When analyzing trend data, managers should consider typical levels of variation to avoid reacting too strongly to changes. We did not find regular annual trend reporting for participation and events numbers. Metro should increase the use of trends reporting and analysis to realize its benefits.

Benchmarking is another beneficial practice. It compares performance to professional standards or to the performance of other organizations. Benchmarking is used to provide context for performance measurements and to support improvements. In GFOA surveys of different government entities, the value of benchmarking generated more mixed views because of some of its challenges including finding comparable data, but it was still mostly viewed as a positive practice.

Improve reporting to increase communication value

We also identified opportunities to improve performance measures reporting. GFOA recommends performance measure reporting to stakeholders. Communication efforts should ensure that performance measures are distributed throughout all levels of the organization and are made readily available externally.

Effective communication of performance measures, according to the GFOA, includes the following elements:

- Delivery – how and where will they are communicated
- Audience – who the primary audience is
- Format – the best way to present the information
- Frequency – how often to communicate and update information
- Clarity – sources of data, calculation methodology, expected targets, and actual results
- Context – background on why the measures were chosen and what the results mean to operations, service levels, or outcomes

In March 2024, management stated that performance measures would be included in the FY 2024-25 budget. We were told that each department and venue would select two or three performance measures to be reported in the published budget. While this may help restart the budget performance reporting, it may not be enough to assess progress on organizational goals.

Metro needs to determine if the annual budget will be the primary platform to report performance and what the role of other reports will play. If departments and venues continue to report their individual performance, it could also be valuable to issue an agency-wide annual performance report which summarizes Metro's overall impacts. This approach would mirror the reporting practices of other government agencies.

Establishing an expectation for timely and regular performance reporting could help strengthen accountability and transparency. There are many formats currently used to report performance including web dashboards, staff reports, and regional and annual reports. Although there were many report types, some departments or venues did not appear to publish performance data in any form in the past year. The most recent report we located for one part of Metro was from FY 2017-18.

We also observed that when a department was involved in multiple initiatives, it reported progress for the individual initiative. However, a report of progress towards the overall department goals was not provided. This made it difficult to know if it achieved its goals. It would be valuable for all departments and venues to annually report overall progress towards their goals, regardless of the specific program or service.

The Metro website contains inconsistent and incomplete performance reporting. This was significant because websites are governments' most important external communication tool. Some departments and venues provided performance information on the website, but we observed gaps and room for improvement.

The weaknesses in performance reporting on the website appeared to be caused by a combination of the inconsistent organization and limited reporting content. Some departments and venues have a dedicated primary page, but others have multiple pages which describe different programs. Some departments do not have a central page.

Venues have individual pages on the Metro website, in additional to their own dedicated websites. The Metropolitan Exposition and Recreation Commission web page also contained information about each venue which was sometimes more up to date than the venue's own webpage.

Increased performance reporting on Metro's website could increase the consistency and accessibility of performance information. Some departments including Parks and Housing utilize web dashboards. Dashboards can help make data easier to interpret, improving its communication value. Dashboards can help simplify and filter relevant data using charts and graphs or other forms of analysis to make it more user friendly.

One dashboard approach is to track and report progress toward goals by reporting current and past performance, along with targets and explanatory comments. Several city governments utilized multiple department dashboards in one centralized area including summary information. Creating an expectation and commitment to improved communication of performance information could ensure that internal and external stakeholders have the information needed to understand Metro's performance.

Recommendations

To comply with Metro's financial policies, the COO and CFO should:

1. Include performance measures in the annual budget.

To increase the effectiveness of performance measures for decision-making and set expectations for department and venue directors, the CFO should:

2. Revise Metro's financial policies related to performance measures to include:

    a. Guidance for the frequency and types of performance measures to track progress on regional and equity outcomes, department and venue goals, and department and venue operations.

    b. Targets for each measure to help interpret performance.

    c. At least five years of prior year data to show performance trends over time.

    d. Maintain publicly accessible performance reports.

    e. A process to review and approve proposed changes to existing performance measures.

To align department and venue performance measures with Metro's organizational goals and financial policies, department and venue directors should:

3. Review existing goals and revise them as needed to reduce the use of ambiguous terms.

4. Identify at least one performance measures for each goal.

5. Increase the types of measures used to ensure they include data about outputs, efficiency, service, and outcomes.

6. Create processes to comply with Metro's financial policies and other guidance for performance measures.

Scope and methodology

The purpose of this audit was to determine if there were performance measures to track progress on Metro's commitments. Our review included the commitments made related to Housing; Parks and Nature; Planning, Development and Research; Waste Prevention and Environmental Services; Oregon Zoo; Oregon Convention Center, Portland'5 Centers for the Arts, and Portland Expo Center.

The first objective was to determine which of Metro's commitments include performance measures, clear goals, and performance targets. Using the adopted budget along with department and venue plans, we researched and quantified the commitments for each department and venue, and for related agency-wide initiatives. We selected a sample of commitments based on the criteria of specificity and relevance. The results do not represent a statistical sample and cannot be generalized to Metro as a whole.

To assess the clarity of goals, we researched methods for analyzing clarity and applied those methods to our sample. The evaluation focused on the identification of ambiguous terms. We determined if there were performance measures and performance targets for the commitments identified by comparing the topics of the goals with the topics of the measures. We analyzed the alignment of performance measures and performance targets with the Strategic Targets framework by comparing the content of each. We compared the characteristics of the sample performance measures to the recommended best practices published by the Government Finance Officers Association and other sources.

In the second objective, we determined if progress was made since the 2014 audit and what barriers limited the use of performance measures in recent years. To accomplish this objective, we analyzed the themes from agency budgets, program reports, and interviews with employees.

In the third objective, we identified best practices that could overcome any weaknesses and barriers identified in the first two objectives. To accomplish this objective, we researched relevant best practices and identified which best practices appear relevant and viable for Metro.

In April 2024, we issued a separate letter to management summarizing procurement control weaknesses that were identified during the audit.

This audit was included in the FY 2023-2024 audit schedule. We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

Management response

Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: August 30, 2024

To: Brian Evans, Metro Auditor

From: Marissa Madrigal, Chief Operating Officer

        Andrew Scott, Deputy Chief Operating Officer

        Brian Kennedy, Chief Financial Officer

Subject: Performance Measures Audit

Introduction

Thank you for the opportunity to respond to the Performance Measures Audit. We agree with the findings and recommendations, many of which are already in progress. We officially relaunched Metro's performance management efforts during FY 2024-25 budget development, following the decision in late 2018 to pause budget performance measures, management reports, and scorecards due to the lack of value for our organization. Your office's 2014 audit highlighted the lack of relevance of existing performance measures at that time, and we appreciate your analysis and insights as we enter a new phase of performance management at Metro.

As the 2024 audit notes, Metro's strategic focus has evolved over the last 15 years. The Six Desired Outcomes were adopted in 2008 to help anchor future urban planning to shared regional values and measurable goals. In 2016, Metro embarked on the Regional Investment Strategy focused on housing, parks and nature, and transportation to ensure that regional growth coming out of the great recession benefitted historically and currently underserved communities. Council asked the Metro Chief Operating Officer to develop a new strategic plan encompassing this bold regional vision.

However, the March 2020 shutdown disrupted this work, as institutional capacity shifted toward managing venue closures, revenue loss, and multiple rounds of layoffs. The updated performance management project was put on pause. Instead, the Metro COO developed the Strategic Framework as part of pandemic recovery planning to prioritize work and inform decision-making, focused on "Keeping our Promises" and "Building Back Better."

In 2023, Metro engaged various stakeholders to help establish a future-state vision for the region focused on housing, the economy, and the environment. Council adopted these Strategic Targets in December 2023 and departments and venues were asked to incorporate these targets into

their work as part of FY 2024-25 budget development. They were also asked to identify 2-3 budget performance measures related to the strategic targets. This work overlapped with this audit timeline, and as a result we have already made some of the changes recommended in the audit. In FY 2025-26 Budget Development, management is focused on fully implementing our new Performance Framework to help operationalize Metro's regional priorities, demonstrate accountability and transparency in our work, and establish a robust process for evaluating our progress.

Performance Framework

Working to build an affordable, climate-resilient region where everyone has a chance to thrive and grow

Strategic Targets
How we set regional priorities

Performance Measures
How we hold ourselves accountable

Performance Management System
How we set goals, monitor progress, and evaluate results

Specific steps are discussed further in management's response to the audit's recommendations.

To comply with Metro's financial policies, the COO and CFO should:

1. Include performance measures in the annual budget.

Response:

Management agrees, as performance measures are critical not only for complying with financial policy but to help hold our organization accountable for our work. Departments identified 2-3 performance measures to include in the FY 2024-25 Adopted Budget. This included a mix of metrics identified by departments in alignment with the new Strategic Targets, existing measures with historical data and performance goals, and concepts for new measures that will be explored for the future. Departments will continue refining these measures as part of FY 2025-26 Budget Development.

Timeline:

Already completed.

To increase the effectiveness of performance measures for decision-making and set

expectations for department and venue directors, the CFO should:

2. Revise Metro's financial policies related to performance measure to include:

    a. Guidance for the frequency and types of performance measures to track progress on regional and equity outcomes, department and venue goals, and department and venue operations.

    b. Targets for each measure to help interpret performance.

    c. At least five years of prior year data to show performance trends over time.

    d. Create and maintain publicly accessible performance reports.

    e. A process to review and approve proposed changes to existing performance measures.

Response:

Management agrees that the COO and CFO should provide robust guidance and expectations for tracking, reporting, and analyzing performance measures. We do not necessarily agree that financial policy is the most appropriate or desirable avenue for that guidance, as expectations, organizational needs, and best practices shift over time. We want to retain flexibility to ensure that Metro's approach to budget performance measures is meaningful for departments, decision-makers, and the public.

To that end, we agree that budget performance measures should include targets or benchmarks to help provide context for the results. The FY 2024-25 suite of budget performance measures includes some metrics with targets tied to strategic plans, metrics that use industry-accepted benchmarks for performance, and many measures that do not currently have either. We will work with departments to determine the most meaningful way to set expectations for individual performance measures to help inform operations and policy.

For the FY 2024-25 Adopted Budget, departments were asked to provide up to five years of historical data for performance measures where that information was available. Many measures are new, and data will be added over time. Each performance measure is visualized in a new dashboard that will evolve over time as we fully implement our updated performance management system. Our Performance Data and Policy Lead will work with department Finance Managers, staff, and directors to continue reviewing performance measures and balance the benefits of tracking metrics over time with the need for new information. Changes to performance measures may be made annually during budget development, with an accompanying rationale and analysis.

Timeline:

These recommendations were partially implemented in FY 2024-25 Budget Development and will be fully implemented in FY 2025-26 Budget Development.

To align department and venue performance measures with Metro's organizational goals and

financial policies, department and venue directors should:

3. Review existing goals and revise as needed to increase clarity by reducing the use of ambiguous terms.

Response:

The audit notes that "Metro's agency-wide initiatives stood out as having the highest proportion of goals with limited clarity and measurability compared to the department and venue goals." Our understanding is that this analysis was informed by identifying ambiguous terms in the Strategic Targets framework and determining whether there is alignment with goals and measures. While we have not seen the specific analysis that informed the audit findings, Management agrees that providing clarity about how progress toward strategic goals will be measured is critical for operationalizing Metro's organizational priorities. For the Strategic Targets specifically, we are working with Council, the Senior Leadership Team, and staff to 1) establish regional indicators for each target, and 2) provide detailed guidance for how to operationalize this strategic framework as part of FY 2025-26 Budget Development.

Timeline:

In progress, to be completed as part of the FY 2025-26 budget process.

4. Identify at least one performance measure for each goal.

Response:

Management is unclear about the scope of what the audit includes as "each goal" but agrees that organizational goals should use metrics to assess progress toward a specific, measurable, achievable, relevant, and timely result. Our new performance management system will establish expectations for setting goals, monitoring progress, and evaluating progress, largely tied to the annual budget development process. As part of FY 2025-26 Budget Development, departments and venues will be reviewing their initial suite of performance measures to determine if there are measures that should be added or revised to support specific goals, including Metro's Strategic Targets and other State of Oregon goals and requirements. As discussed elsewhere, we are also identifying broader Regional Indicators as key performance measures for each Strategic Target of housing, economy, and environment.

Management also notes that the Strategic Targets are intended to be a regional vision that all jurisdictions can work toward. These priorities encompass not only work that Metro contributes to directly, but opportunities for Metro to utilize its role as a regional convener and policymaker to address issues our communities care about most.

Timeline:

In progress, continuing through FY 2025-26 Budget Development and beyond as needed to capture new goals.

5. Increase the types of measures used to ensure they include data about outputs, efficiency, service, and outcomes.

Response:

Management agrees that using a diverse array of performance measures is a best practice and a practical approach for capturing the best information available. We want to ensure that our work leads to specific outcomes; in addition, understanding workload, time, user satisfaction, cost per service, and other measures provide valuable information about not only what we do but how we do it. FY 2024-25 budget performance measures include a variety of types of metrics, and we will expand the number and scope of measures over the next several fiscal years.

Timeline:

Completed, with continued refinement in future budget years.

6. Create processes to ensure compliance with Metro's financial policies for performance measures.

Response:

Management agrees that performance measures will only be meaningful to the organization if they are supported at all levels – Council, leadership, directors, managers, and program staff. We are currently establishing a robust process for reporting and analyzing performance data through annual budget development. We will work with departments and venues to ensure that this process supports and aligns with their own operational needs.

Timeline:

In progress as part of FY 2025-26 Budget Development.

Office of the Metro Auditor
600 NE Grand Avenue
Portland, Oregon 97232
503-797-1892

Materials following this page were distributed at the meeting.

Metro Regional Supportive Housing Services

FY24 Q1-Q4 program update

Metro Council | September 2024

Agenda

- Regional progress

- County highlights

- Financial update

- Questions and discussion

Regional progress: FY21 - FY24 Q4

Type	Progress from FY21 - FY24 Q4
Permanent supportive housing placements	**4,256** households
Rapid rehousing placements	**2,038** households
Eviction prevention	**15,073** households
Shelter units	**1,890** units

Regional progress to annual workplan goals

Type	FY24 goal	July 1, 2023 to June 30, 2024	FY24 Q4 Only
PSH placements	**1,395** households	**1,294** households (-7.24% of goal)	**277** households
Rapid Re-Housing placements	**935** households	**1,370** households (+46.52%)	**489** households
Homelessness prevention	**1,725** households	**3,130** households (+81.45%)	**988** households
Shelter units	**460** units	**960** units (+108.7%)	**49** units

Population A and B placements: FY24

County	Population A	Population B
Clackamas	**453** households	**1,390** households
Multnomah	**1,042** households	**841** households
Washington	**551** households	**1,955** households

Clackamas County: Progress to year 3 goals

Type	FY24 goal	July 1, 2023 to June 30, 2024	FY24 Q4 Only
PSH placements	**405** households	**412** households (+1.73% of goal)	**96** households
Rapid re-housing placements	**120** households	**196** households (+63.33%)	**29** households
Homelessness prevention	**625** households	**1228** households (+96.48%)	**431** households
Shelter units	**155** supported units	**210** supported units (+35.5%)	**49** supported units

Clackamas County: Program highlights

- Nationally recognized coordinated entry system
- New shelter and transitional shelter units
- New permanent housing

Multnomah County: Progress to year 3 goals

Type	FY24 goal	July 1, 2023 to June 30, 2024	FY24 Q4 Only
PSH placements	**490** households	**442** households (-9.8% of goal)	**79** households
Rapid re-housing placements	**515** households	**910** households (+76.7%)	**397** households
Homelessness prevention	**600** households	**334** households (-44.33%)	**66** households
Shelter units	**245** supported units	**800** supported units (+227%)	**N/A**

Multnomah County: Program highlights

3000 SE Powell Blvd

- The Hazel Ying Lee Apartments
- National recognition for SHS-funded mobile intake services

Multnomah County: Corrective Action Plan

- MC was placed on a CAP for underspending in FY 23
- FY 24 CAP spending requirements were met
- 5 of the 6 programmatic goals were met

Washington County: Progress to year 3 goals

Type	FY24 goal	July 1, 2023 to June 30, 2024	FY24 Q4 Only
PSH placements	**500** households	**440** households (-12% of goal)	**102** households
Rapid re-housing placements	**300** households	**264** households (-12%)	**63** households
Homelessness prevention	**500** households	**1,568** households (+213.6%)	**491** households
Shelter units	**60** new units	**90** new units (150%)	**N/A**

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Washington County: Program Highlights

- Rolled out RLRA-Only Program
- Launched monitoring of the Supportive Housing Services funded Enhanced Rapid Rehousing (ERRH) program

ENHANCED RAPID RE-HOUSING (ERRH) ERRH is a type of Rent Assistance. It assists households in being able to gradually take over 100% of the contract rent. It starts with households paying a portion of their income towards the contract rent and the Housing Authority pays the remaining balance. Households & landlords will work with a case manager to apply, move in, and sign a lease to begin payment.

Financial update

- Total county spending was $294 million in FY24.
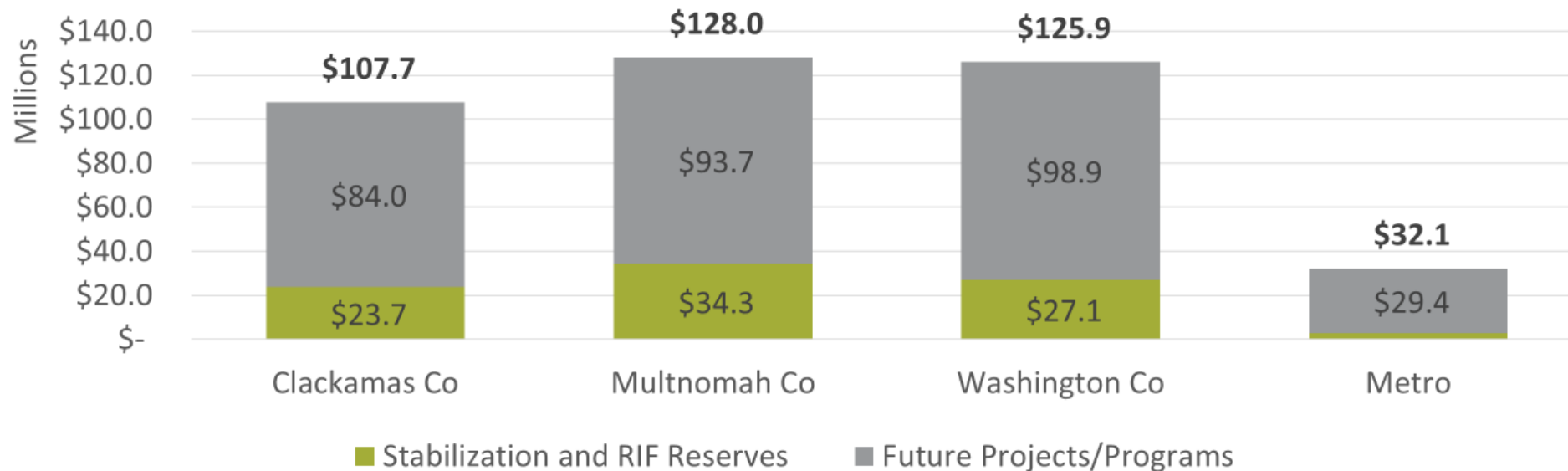- Each county saw significant spending growth from the prior year.
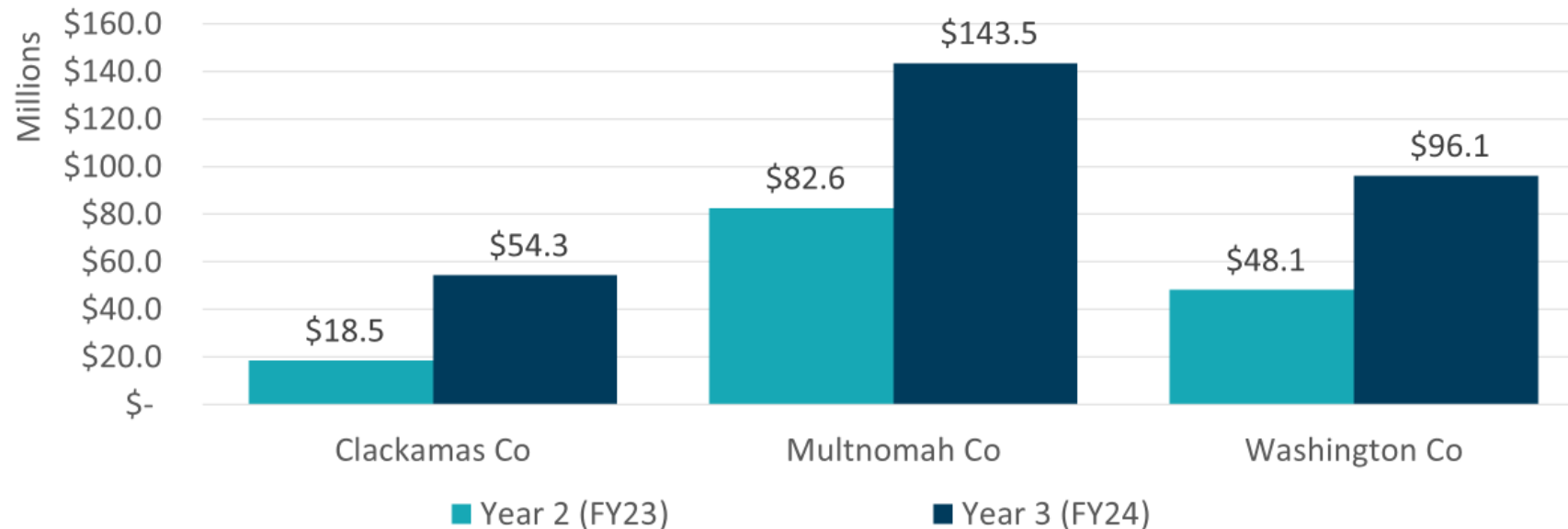
Financial update

- Carryover did not increase significantly in FY24.
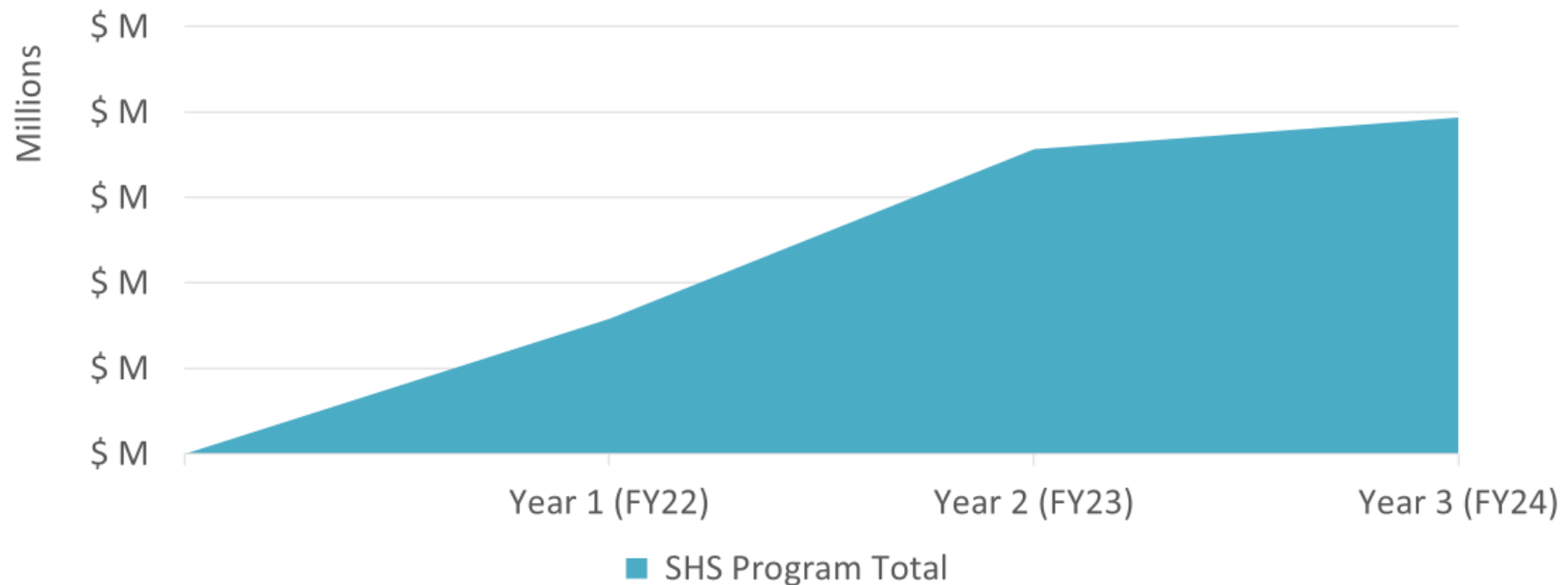
Financial update

- Carryover at year-end is $394 million:
  - $88 million reserved for tax stabilization and regional investments
  - $306 million for future projects/programs

Financial update

- In FY24, counties invested just over $100 million of carryover funds in:
  - Service provider capacity building
  - Expansion of short-term rent assistance
  - Alternative and transitional shelters
  - Drop-in and resource centers

Thank you!

Questions and discussion

Carol Chesarek
September 18, 2024

RE: Proposed Metro Ordinance 24-1517

Dear Council President Peterson and Council,

I testified on behalf of Forest Park Neighborhood at the hearing for Ord 24-1517 on September 5th. After the hearing, I spent some time talking with Noelle Dobson and Alejandra Cortez about the proposals in the Ordinance and the Metro Central Grants committee. Thank you, Noelle and Alejandra for spending time with me for a constructive conversation. These are my personal comments.

Noelle and Alejandra tried to reassure me with a couple proposals. One was a proposal to update the Central Grants committee bylaws to mention neighborhoods must be notified when Metro is recruiting for the grants committee.

The other was that the Grants committee is already required to include representatives from across the enhancement area and that the Council President already gets information about where the recommended grant committee members live/work/play in the area to ensure that the full range of the geographic grant target area will be represented.

Promises from current staff are nice, but staff change, elected officials are term limited, and the outside world doesn't hear about changes to Metro Central Grants committee bylaws unless you know someone on the committee. New staff may have different priorities and goals.

I'd like to share an experience. Several years ago, I represented the Neighbors West-Northwest neighborhood coalition (this coalition provides support services to neighborhoods across NW Portland) on the Portland Parks & Recreation Budget Advisory Committee (BAC). At the time, Portland Councilor Amanda Fritz had Parks in her portfolio. She is a strong supporter of neighborhoods, and under her leadership each of the neighborhood coalitions across the city was invited to nominate a representative to the Parks Budget Advisory Committee. I participated in the committee for three or four years. Each year there was at least one Parks community outreach event that the committee attended to get feedback about priorities.

But then Parks was moved to another Councilor's portfolio. A new Parks Director was hired. I was told that since I was on the Parks BAC "Friends and family" email list I would still get all the information about the meetings and could still attend and comment as a member of the public.

But that was only true for one more year, then the Parks budget process became hidden. There were no more emails to the "Friends and family" list. There was no information on the Parks web

site about meetings, the proposed budget or priorities or very little information about anything related to the Parks budget.

Information about the citywide budget process also became more limited. There were no more Parks community meetings to get input. The only source of information I could find about the Parks budget development a couple years later was to track down and read the minutes of the Portland Parks Foundation, because they were always invited to participate in the BAC. But those minutes were well after the fact.

I don't always even remember to look for information any longer because the process has become so closed that it is pointless. Hopefully the new City Administrator will revive public involvement in budget development across bureaus.

Because of this experience, proposing to keep neighborhoods involved in recruiting for the Metro Central Grants committee by putting a line in the bylaws, or taking someone's word for it that neighborhoods will always be valued participants doesn't hold a lot of water with me. I'm sure current staff are sincere, but they will eventually retire or take other jobs.

Metro staff also suggested to me that there is already a requirement to recruit committee members from across the grant area, but the proposed language in the Ordinance only says (2.19.120(d) Nominations)

> potential nominees who are invested in the enhancement area and reflect the diversity of the areas residents, businesses, organization, and communities, along with other relevant criteria. From this pool, staff will recommend to the Council President a slate of nominees for appointment. For each nominee, staff will provide the Council President with relevant information about the nominee, including but not limited to the nominee's connection to the enhancement area, and the knowledge, skills, and experiences that qualify the nominee to serve on the committee.

There is no reference to the geographic area the nominee represents, or reporting on their geographic area to the Council President, only vague language about reflecting the diversity of the area. This language appears to allow all representatives to come from a single geographic part of the enhancement area as long as they embody other kinds of diversity.

Some of the neighborhoods currently represented on the committee only have a small part of the enhancement area in their boundary. If these are the neighborhoods that repeatedly fail to nominate committee members in a timely manner, the Grants committee membership requirements could be changed to eliminate those neighborhoods while keeping those that represent more of the enhancement area and are more timely with their nominations. Those positions could instead be held by at large community representatives.

Thank you for your consideration.

Carol Chesarek
Secretary, Forest Park Neighborhood

Georgia Langer

Name *	David Fredrickson, A.I.A.
Email *	kawikaaokk@aol.com
Address	 1622 N E Rosa Parks Way Portland, OR Portland/97211 United States
Your testimony	Why isn't there an option for 75 'units' per acre, but raise them all upward in one or two bldgs. and the remainder of the land is park land and garden? The height limit could be anything we make it, 100 meters, 250 M, 555 M. depending on the sub–strata and proximity w/ other high–rise living, w/o the only view is NOT of someone else's living room across the street. Example: Downtown Vancouver B.C. Highrise living must be spaced out.
Is your testimony related to an item on an upcoming agenda? *	No