



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: October 9, 2024
Time: 4:00pm-6:00pm
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive a presentation and review the Coordinated Entry Regional Implementation Plan

4:00pm **Welcome and Introductions**

- Decision: meeting summary approval

4:15pm **Public Comment**

4:25pm **Conflict of Interest**

4:30pm **Staff Updates**

4:45pm **Coordinated Entry Regional Implementation Plan**

- Decision: implementation plan approval

5:55pm **Closing and Next steps**

6:00pm **Adjourn**

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Tri-County Planning Body Meeting Summary

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: Wednesday, September 11, 2024
Time: 4:00 PM – 6:00 PM
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive a briefing on and discuss the Regional Strategy Investment Fund (RIF).

Member attendees

Eboni Brown (she/her), Zoi Coppiano (she/her), Co-chair Mercedes Elizalde (she/her), Yoni Kahn (he/him), Nicole Larson (she/her), Sahaan McKelvey (he/him), Cameran Murphy (they/them), Cristina Palacios (she/her), Co-chair Steve Rudman (he/him), Mindy Stadlander (she/her)

Absent members

Yvette Marie Hernandez (she/her), Monta Knudson (he/him)

Elected delegates

Metro Councilor Christine Lewis (she/her), Multnomah County Chair Jessica Vega Pederson (she/her)

Absent delegates

Washington County Chair Kathryn Harrington (she/her), Clackamas County Chair Tootie Smith (she/her)

County staff representatives

Clackamas County – Lauren Decker (she/her), Multnomah County – Christina Castaño (she/her) and Breanna Flores (she/her), Washington County – Nicole Stingh (she/her)

Metro

Ruth Adkins (she/her), Abby Ahern (she/her), Giovanni Bautista (he/him), Liam Frost (he/him), Michael Garcia (he/him), Rachael Lembo (she/her), Lo Miranda (they/them), Patricia Rojas (she/her)

Kearns & West Facilitators

Madeline Kane (she/her), Colin Baker (he/him)

Note: The meeting was recorded via Zoom; therefore, this meeting summary will remain at a high-level overview. Please review the recording and archived meeting packet for details and presentation slides.

Tri-County Planning Body Meeting Summary

Welcome and Introductions

Madeline Kane, Kearns & West (K&W), introduced herself and welcomed the Tri-County Planning Body (TCPB) to the meeting, facilitated introductions, and reviewed the agenda and objectives.

Co-chair Mercedes Elizalde provided opening remarks.

The TCPB approved the August Meeting Summary.

Public Comment

No public comments were made.

Conflict of Interest

Cristina Palacios declared a conflict of interest as Housing Oregon has applied to be a contractor with Metro and would receive SHS funding.

Eboni Brown declared a conflict of interest because Greater Good Northwest receives SHS funding.

Yoni Kahn is employed by Northwest Pilot Project, which receives SHS funding from Multnomah County. He noted that he serves on the TCPB to share the perspective of a provider, but that he does not represent the organization that employs him.

Sahaan McKelvey shared that he works at Self Enhancement Inc (SEI) which receives SHS funds.

Cameran declared that they work at Boys and Girls Aid, which receives SHS funds.

Mercedes Elizalde shared that her employer Latino Network, receives SHS funds, but clarified that neither her salary nor the team she leads at the organization are paid with SHS funds.

Staff Updates

Liam Frost, Metro, provided updates on the staffing of the Metro team that supports the TCPB, including that Valeria McWilliams is on leave, and Abby Ahern and Giovanni Bautista have stepped in to support.

Yoni Kahn and Cameran Murphy introduced themselves as new members of the TCPB.

Liam noted that Metro is finalizing the COO recommendation memo to share with Metro Council.

Regional Investment Fund Presentation

Liam provided an update on the Regional Investment Fund (RIF), including background and context for the requirements of the RIF, understandings between Metro and Counties about usage of RIF funds, the focuses of Supportive Housing Services (SHS) in Years 1 and 2, and County RIF investment areas for Years 1 through 3. He noted that heading into the fall and winter, TCPB will be reviewing and possibly approving RIF investments related to TCPB-approved goals, such as coordinated entry implementation.

Rachael Lembo, Metro, presented an update on the FY25 financials for the RIF. Liam then presented a tentative FY25 work plan for each regional goal.

TCPB members and elected delegates had the following questions:

- **TCPB member question:** On the RIF Work Plan slide, what does “ongoing” mean?

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- **Metro response:** After a regional goal plan is approved, “ongoing” indicates that plan implementation and monitoring work will be occurring.
- **TCPB elected delegate question:** The TCPB has been asked to review an implementation plan separate from the plan’s budget. Is Metro assuming that budgets are baked into plans going forward or will there be separate budget votes? I am referring to the landlord recruitment and retention plan.
 - **Metro response:** That plan had a budget attached to it, and the vote on that plan was more a function of that particular plan rather than the process the TCPB aspires to.

Nicole Stingh, Washington County, shared examples of the ways Washington County has spent RIF funding, including staff creating implementation plans for the regional landlord recruitment and retention goal, Homeless Management Information System (HMIS) regional coordination, a workforce pilot program, and the regional risk mitigation program.

Cristina Castano, Multnomah County, reminded the TCPB that counties were granted permission to use RIF funds before implementation plans were approved, which allowed the Counties to address urgent needs and set the stage for longer-term successful outcomes. She provided examples of RIF spending in Multnomah County, including organizational health grants (specifically with the United Way), identification and addressing of opportunities for systems change, and regional alignment work (e.g. the landlord recruitment and retention programs, risk mitigation, and HIMS regional alignment), healthcare systems alignment.

Lauren Decker, Clackamas County, shared how Clackamas County has used RIF funding, including healthcare and housing systems alignment and a case conferencing pilot program, housing support for individuals recovering from illness or injury, technical assistance and housing plan development to ensure individuals stay housed.

TCPB members and elected delegates had the following questions and comments:

- **TCPB member question:** Of the \$25.5 million in the FY25 budget allocated to TCPB goals and plans in development, how much money is allocated to each county?
 - **Metro response:** For Clackamas County, it is \$7.9 million; for Multnomah County, it is \$12.8 million; and for Washington County, it is \$4.9 million.
- **TCPB elected delegate question:** When discussing goal and non-goal related expenditures, what are considered non-goal related expenditures?
 - **Metro response:** That terminology is meant to comprehensively cover that this body covers all RIF-related expenditures. So far, TCPB has only considered goal areas, but in the future, there could potentially be other investments that are not expressly part of a goal that come to this body for review and approval. It might be very unlikely to happen soon, but this language is meant to be exhaustive in capturing these potential future investments.
- **TCPB member question:** What is the funding breakdown for each county for FY25?
 - **Metro response:** For coordinated entry, Clackamas and Washington Counties have approximately \$0.5 million budgeted. For healthcare system alignment, Clackamas County has \$0.8 million, Multnomah County has \$0.4 million, and Washington County has approximately \$0.7 million. For training, Clackamas County has \$0.2 million, Washington County has \$1 million. For technical assistance, Clackamas County has \$6.3 million, and Washington County has \$2.4 million. For employee recruitment and retention, Clackamas County has \$0.2 million, Multnomah County has \$10.3 million, and Washington County has \$0.4 million. And for HMIS, Multnomah County has \$2 million.

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- **TCPB member question:** How much of the funds planned for this year can support implementation plans versus and how much of the funds are separate and would need new funds to implement? For example, with a plan for coordinated entry coming in October, how much of the approximately \$0.5 million to \$1 million that each County has appropriated will the TCPB see in that plan? I ask because I want to know to what degree plans will be underfunded or delay the implementation of plans because of not enough funding.
 - **Washington County response:** The answer might vary goal to goal or county to county. There are hard budgeted expenditures, like staffing, but those would be included in the plan. Then there are other items that could be shifted to align with regional efforts, e.g. technical assistance. I do not foresee underfunding or delayed implementation as a risk.
 - **Metro response:** Other TCPB members have asked similar questions over the years. When Metro and County staff come to the TCPB with proposed investment strategies, this body will ask: “Is this enough funding? Is this at the right scale? If not, how should we rearrange budgets and what does that mean in terms of timing?”
 - **Multnomah County response:** It is difficult to say at this point, but for example with coordinated entry, the County is doing its best to align RIF funds with the implementation plan that will be shared with this body soon. We believe RIF funds are aligned with approved implementation plans, so it should not be a challenge to align future implementation plans.
 - **Clackamas County response:** The County does not have committed RIF funds for coordinated entry. The committed budget is only for healthcare system alignment and regional landlord recruitment and retention.
- **TCPB member question:** What can members of the TCPB do to support this work?
 - **Multnomah County response:** We welcome flexibility to align our efforts and connect the dots. Being flexible is part of creating implementation plans. Many parts of these plans require thinking outside the box to address our housing and homelessness challenges.
 - **Washington County response:** We would appreciate your thinking about how implementation plans can allow for learning along the way and your understanding that our work together might evolve over time.
 - **Metro response:** It would be helpful for this body to help the Counties determine which programs are scalable and where ideas can be aligned, as they are testing and innovating.
- **TCPB member comment:** In future presentations about budgets, please provide more detail on the slides. This will allow TCPB members to be more supportive.
 - **Metro response:** We have a more detailed budget that we can share.
- **TCPB member question:** Could we get clarification about the overall budgeting process? I would appreciate clarity about the funds spent from the RIF versus funds spent from Counties. How can the TCPB contribute to the process of plan development, rather than simply voting on a single plan without feedback? How does the handoff happen now that TCPB is responsible for the RIF? There seems to be a large variance in RIF funds between Counties. Why is there such a large discrepancy and why does the regional approach allow for this? I want to make sure the TCPB can contribute in a meaningful way to ensure the RIF is allocated to all of the goals well when they are presented to us one at a time.
 - **Metro response:** To reiterate a point made earlier, Counties had leeway to invest RIF funds as they choose in regional strategies until the TCPB approved a plan, which happened for the first time this March. Going forward, the TCPB will need to approve all proposed investments. One to one-and-a-half years ago, this body

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agreed to identify goal areas, which took longer than anticipated, and that process was informed by the members of this body. Then the members asked Metro and the Counties to develop plans to effectuate those goal areas. Next month, e.g., the TCPB will be asked to review and approve a plan on coordinated entry. This body can decide to approve, reject, or request improvements or more information about it, depending on if the members think that the proposed plan accurately reflects the goal that was set. Metro staff is happy to talk with any member about process outside of this meeting.

- **Washington County response:** Regarding variances in budget allocations by county, there are times when one county takes the lead on plan development and/or piloting for all three counties.
- **TCPB member comment:** Requests for flexibility make sense, but high-income people who pay the highest share of these taxes are starting to want to see results. Flexibility and innovation can be seen as wasting taxpayer money on initiatives that do not work. I know that funding discrepancies between the counties are often because one county takes the lead and/or pilots a program for all three counties. I would like to see more details on these leading/piloting efforts because we need to start showing what is working and what is not in response to pushback, we are starting to get against the tax that funds these programs.
- **TCPB member comment:** It is important that we do not consider each of these goals as individual expenditures, and additional detail will allow the members of the TCPB to elevate the successes and challenges of the programs that the RIF funds. We also need to keep in mind that this work involves moving people through large, complex systems, so feedback from service providers will be crucial to ensure we are meeting our goals. I hope to build off of existing investments to center the journeys of clients through these systems.
- **TCPB member question:** This question is specific to Multnomah County's United Way grant. My understanding is that this grant was to fill gaps around wage complications and capacity needs. Instead of doing that through increases in individual contracts, this grant was meant to be flexible to address that issue. Will it eventually translate into wages in those contracts so that the \$10 million will no longer be paid for by the RIF? What is the plan for the future of that grant?
 - **Multnomah County response:** The plan is to renew that process with the United Way. This initiative supported 3,500 individuals already employed in housing and homelessness services. Our intention is to continue to support employment retention and reducing position vacancy rates. The hope is to continue that in this fiscal year. The \$10 million in FY24 was to meet an urgent need for providers before we had the capacity to commit to year-over-year funding. The United Way grant was intended to get more money out the door and in providers' hands quickly to address urgent employment challenges. In FY25, Multnomah County is exploring using the RIF to be in line with the employee recruitment and retention goal. We are trying to figure out how to continue to get money to providers to solve for recruitment, vacancies, and retention. We want to extend that investment this year because you cannot effectively target the issue of employee recruitment and retention with a one-time grant.
- **TCPB elected delegate comment:** The United Way grant was approved by the Multnomah County Board of Commissioners last fall with some unanticipated funding from the SHS measure. The intention was to respond quickly to providers who had expressed challenges with staff, hiring, and retention in the most flexible way possible. It was viewed as a way to meet the needs of providers in the short term while looking at the long-term plan. The long-

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term goal is to get providers sufficiently staffed to be able to implement programming so that we can start to hold providers more accountable with outcomes.

- **TCPB member question:** How ongoing will the United Way grant be? Do you anticipate it being a renewal for this fiscal year only or to be an ongoing annual allocation of the RIF?
 - **Multnomah County response:** That will be a topic we would want to discuss with the TCPB beyond FY25.
- **TCPB member comment:** We should continue to discuss the issues with RIF funding and not treat the county RIF budgets as set in stone. This is only 5% of counties' funds. The RIF is for systems development, alignment, efficiency, and effective region-wide policy.
- **TCPB member comment:** With coordinated entry coming before the TCPB in October, I would appreciate Metro sharing a higher level of detail that shows the amount of funding comes from the RIF, the percent of each county's RIF funding that will be allocated to coordinated entry, and the percent of RIF funds that are set aside for future implementation plans.
- **TCPB elected delegate comment:** As budgets for implementation plans come before us, we have the power to add or subtract as we see regional need. And as counties are innovating to develop and pilot programs, this body may have to tell them that will need to undo some things that they have been doing in the past because they are not in the best interests of our region, including things that might be required by the Federal Government. We may want to consider asking as a process question, "In addition to doing more and creating more services, are there things that we should undo to improve services regionwide?" We should be comfortable with undoing processes that no longer serve our region well.
- **TCPB member comment:** I agree. We should not be perpetuating and advancing racist infrastructure and policies that have been baked into Federal processes.
- **TCPB member comment:** I would like to see the equity goals and how they are met and/or not met.
- **Metro question:** Could Multnomah County clarify if it spent RIF funds on the United Way grant in last fiscal year or this fiscal year?
 - **Multnomah County response:** For the last fiscal year, the County did not use RIF funds for the organizational health grants, but this year the County is proposing using the same dollar amount in RIF funds.
- **TCPB member comment:** In thinking about goal versus non-goal budget items, the goals will be clearly expressed in implementation plans but that might not exhaust all funds. Do counties anticipate non-goal related expenses, knowing that all implementation plans will likely not be ready for review and approval this fiscal year?
 - **Washington County response:** We are starting the budget process now. There will likely be some ongoing costs, e.g. staffing and risk mitigation, and they would be in alignment with the conversations that have been had about implementation plans.
 - **Multnomah County response:** We have not planned to budget anything outside of RIF-related costs, but if we were then we would assume that it is different than what we would use for SHS funding.
 - **Clackamas County response:** The only costs we are planning for are ongoing costs, e.g. personnel costs for health and housing and risk mitigation, which is consistent with what we have been reporting to Metro.
- **TCPB member comment:** There needs to be a presentation about the RIF that aligns with the counties' budget processes, so the TCPB can see where the counties are earmarking funds for FY26 that are not connected to any implementation plan.

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- **Metro response:** The counties' budgeting process for the next fiscal year starts in October, which aligns for this request. It also sounds like this request is for a public presentation, which is possible but complicated, given that at least in Multnomah County, the Chair proposes a budget that the Board then has to approve. We can commit to it, though.
- **TCPB member comment:** The United Way program should not be funded by the RIF.

Closing and Next Steps

Co-Chair Mercedes Elizalde shared closing remarks and reflections on the work of TCPB.

Next steps

- Metro staff to share a more detailed FY25 RIF budget to TCPB members.
- Metro staff to provide additional information about the budget process to TCPB members (as requested).
- Metro to consider a standard question in the implementation plan review process about what should be undone.
- Metro to prepare a presentation on RIF funding in alignment with county budgeting.

Adjourn

Adjourned at 5:31 p.m.



Metro

Meeting will start at 4:00pm

Metro Regional Supportive Housing Services

Tri-County Planning Body | October 9th, 2024



Metro

Welcome and Opening Remarks

Agenda

4:00pm Welcome and Introductions

4:15pm Public Comment

4:20pm Conflict of Interest

4:25pm Staff Updates

4:40pm Coordinated Entry Regional Implementation Plan

5:55pm Closing and Next Steps

6:00pm Adjourn



Metro

Public Comment



Metro

Staff Updates



Metro

Coordinated entry

Implementation Plan Review

TCPB Goal

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

Implementation Plan Review - Agenda

- Context
- Implementation Plan Strategies
- Overall Budget and Timeline
- Questions/Discussion/Voting





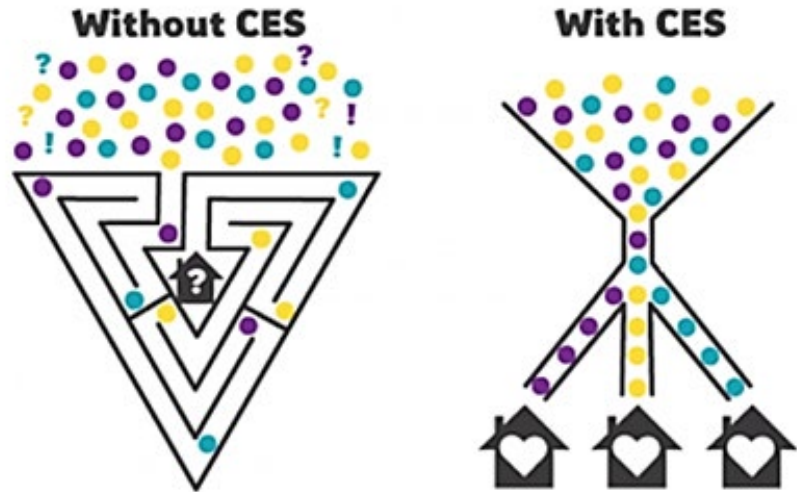
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Context

Coordinated Entry/Access

What is coordinated entry?

- Process through which people move from homelessness to housing services
- Allows households to access all options to address housing needs
- People are “screened in” to the system, rather than “screened out” program-by-program
- The most intensive interventions are prioritized for those with the highest needs



Core elements of coordinated entry



RELT Analysis

- Counties and Metro participated in a discussion on racial equity considerations in the development of the plan, including data analysis, stakeholder engagement, and transparency.
- As a result of this analysis, the plan was updated to include action steps for provider engagement and intentional touchpoints for racial equity analysis during implementation.

Recent Improvements to CES

- **Clackamas County** – Expanded assessment capacity and prevention and diversion programs
- **Multnomah County** – Redesigned coordinated access to address racial disparities
- **Washington County** – Expanded assessment capacity, particularly with culturally specific providers

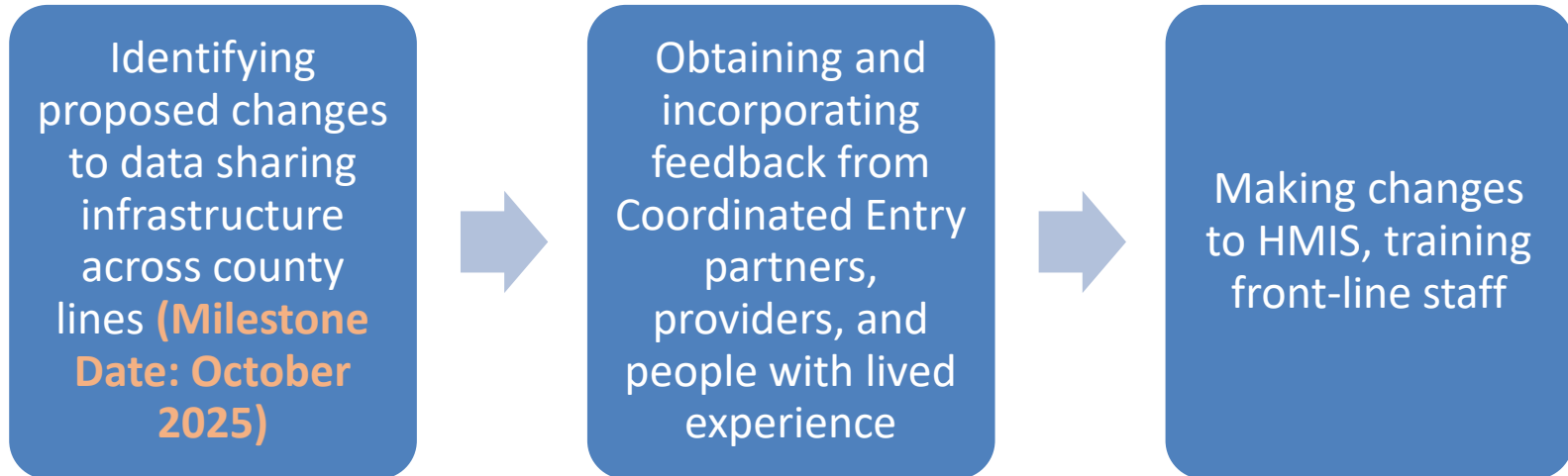


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Implementation Plan Strategies

1. Regionalize Visibility of Participant Data

Key Deliverables and Milestones



1. Regionalize Visibility of Participant Data

Budget

- **Up to \$200,000**
- Consultants to conduct feedback process with providers and people with lived experience
- Compensation for people with lived experience
- Funding for HMIS admins to implement changes

Metrics

- Because this goal is largely in support of other goals articulated in this plan the metrics associated with those goals also serve as success measures for this goal.

Timeline

- Anticipated completion **between August 2026 and February 2027**

2. Align Assessment Questions

Key Deliverables and Milestones

Mapping assessment questions across the three counties, highlighting similar and identical questions



Proposal for changes to assessment workflow, incorporating feedback from Coordinated Entry partners
(Milestone Date: August 2025)



Changes made to HMIS, and training delivered to front-line staff

2. Align Assessment Questions

Budget

- **\$50,000**
- Consultants to conduct research and create proposal for workflow changes

Metrics

- Overlapping questions are streamlined to prevent duplicative assessment experiences.
- Experience of assessors is improved.
- Experience for people seeking housing is improved.
- Participants in coordinated entry experience quicker connection to service options fitting their needs.

Timeline

- Anticipated completion **between August 2026 and February 2027**

3. Regionalize Approaches to Prioritization for Racial Equity

Key Deliverables and Milestones

Assessment of racial equity across the three counties, and landscape analysis of existing prioritization strategies



List of proposed new prioritization factors, incorporating feedback from Coordinated Entry partners and people with lived experience
(Milestone Date: July 2025)



Six-month pilot of new prioritization factors, including an impact evaluation

3. Regionalize Approaches to Prioritization for Racial Equity

Budget

- **Up to \$200,000**
- Consultants to conduct research, draft tools, and facilitate meetings
- Compensation for people with lived experience
- Legal counsel

Metrics

- Racial and ethnic groups disproportionately impacted by homelessness are prioritized at greater rates in each county.
- People with lived experience of homelessness support the new prioritization factors and assessment questions.

Timeline

- Anticipated completion **between December 2026 and June 2027**

4. Regionalize an Approach to Case Conferencing

Key Deliverables and Milestones

Intercommunity learning and research regarding case conferencing best practices, including a Tri-County case conferencing design meeting



Adopting a statement of shared purpose for case conferencing between the three counties
(Milestone Date: June 2025)



Identifying and implementing other strategies to improve case conferencing across the three counties

4. Regionalize an Approach to Case Conferencing

Budget

- **Up to \$745,000**
- Consultants to conduct research, facilitate meetings, and manage change process with HMIS
- Funding for HMIS admins to implement changes
- New designated staff to coordinate case conferencing meetings

Metrics

- Reduced length of time from assessment to match, and match to move-in for those who are case conferenced
- Better attendance and more frequent participation in case conferencing
- Greater provider satisfaction with case conferencing meetings.

Timeline

- Anticipated completion **between August 2026 and February 2027**



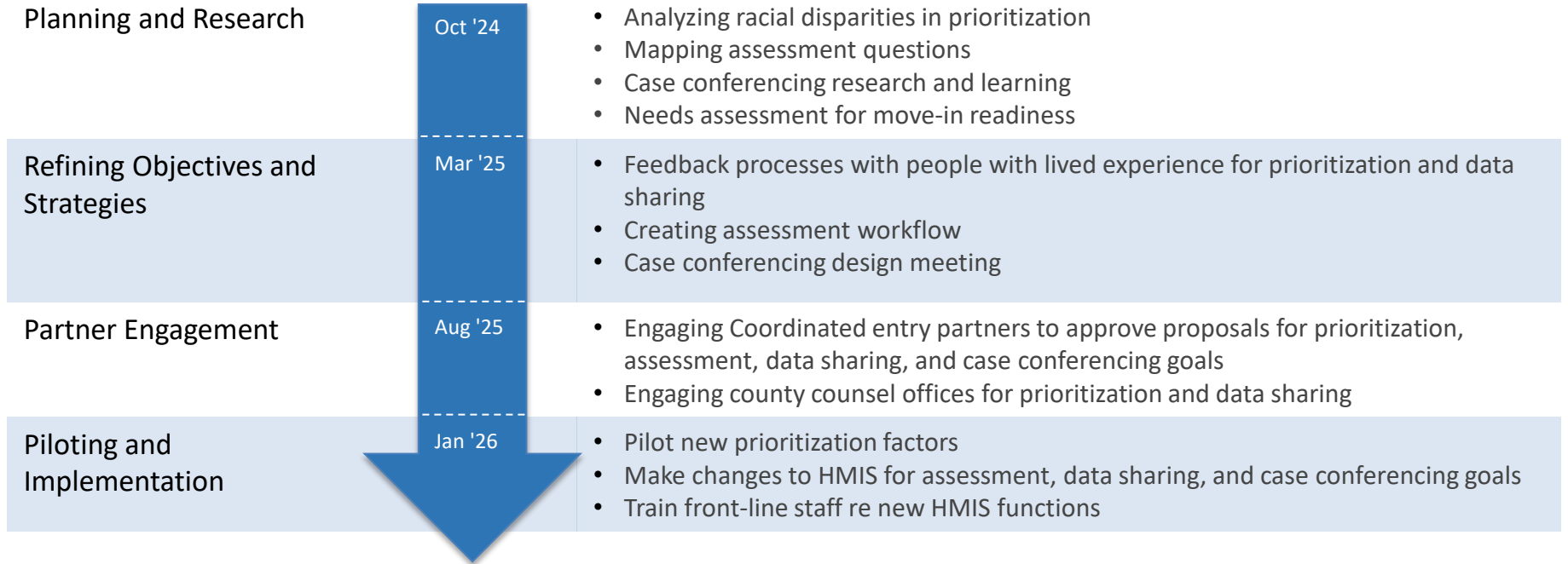
Metro

Budget and Timeline

Overall Budget

Item	Cost
1. Regionalize Visibility of Participant Data	\$200,000
2. Align Assessment Questions	\$50,000
3. Regionalize Approaches to Prioritization for Racial Equity	\$200,000
4. Regionalize an Approach to Case Conferencing	\$745,000
<i>Sub-total</i>	<i>\$1,195,000</i>
Proposed on-going spending	
Washington County Community Connect Program	\$447,928
Total:	\$1,642,928

5. Overall Timeline



Questions?





Metro

Closing and Next Steps

Next Steps

- Post approved meeting summary online
- Next meeting: November 2024

Meeting Adjourned



Tri-County Planning Body Coordinated Entry Goal

Draft Regional Implementation Plan

October 2024



Acknowledgements

A broad team met regularly over the course of several months to identify and prioritize the recommendations included in this plan. This workgroup consisted of representatives from Oregon Metro, as well as each of the three counties in the region. Fifty-five individuals with past or current lived experience of homelessness, across all three counties in the Metro region, also contributed to the content of the plan, with support from three facilitators with lived experience. Homebase provided project management and facilitation support.

Oregon Metro:

Abby Ahern
Melia Deters

Clackamas County:

Melissa Baker
Lauren Decker
Annie Murray
Melanie Pascual

Multnomah County:

Katie Dineen
Lori Kelley
Abigail Phillips
Alyssa Plesser

Washington County:

Jessi Adams
Kisa Quanbeck

Focus Group Facilitators:

Tachelle Dunford
Kellia Jenkins
Myesha Webb

Homebase:

Joy Balinbin
Sasha Caine
Garen Nigon

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Proposal Summary

Coordinated Entry (CE) is the process by which people experiencing homelessness are assessed and moved into housing programs. CE Systems (CES) are person-centered and allow households to access all available options to address their housing needs through one assessment. This results in people being screened into the system, rather than being screened out program-by-program. CES allows the most intensive interventions to be prioritized for those with the highest needs, rather than first-come-first-served. CES is at the center of homeless services systems. It requires regular evaluation and adjustment to meet the changing needs of the people seeking housing services and the changing landscape of available services. If CE systems knowingly or unintentionally perpetuate racial inequities, it trickles down to the entire homeless services system.

There are five core elements of a CES:

- access (effective outreach to all populations)
- assessment (standardized practice across CES)
- prioritization (serve highest needs and address disparities)
- referral (low-barrier process to enter housing programs)
- housing move-in (whether through program participation or self-resolution)

Before CES existed, individuals seeking services took on a large administrative burden of identifying services, applying for services, and searching for alternatives when a service was not available or when they were not eligible. Before CES, each housing program or provider took on most of the burden of the core elements of CES (access, assessment, prioritization, referral, move-in). Since adoption, the burden on housing programs and people seeking services has been reduced and shifted to the CES.

CESs were developed within each county homeless services system, or Continuum of Care, in response to a requirement from the federal Department of Housing and Urban Development (HUD). HUD provided little guidance, no requirements, and no additional funding for this system. CESs were developed independently in each county, according to the systems and services in place at time of development. As a result, all three counties in the Metro region use different assessment tools and processes to accomplish CE.

After passage of the SHS measure in 2020, the Tri-county Planning Body (TCPB) was formed to identify regional goals, approve a regional plan, and approve and monitor financial investments from within the Regional Investment Fund (RIF). With input from Metro and the three counties, the TCPB identified six regional goals to be included in a regional plan; coordinated entry was one of those goals.

The TCPB goal states: Coordinated Entry is more accessible, equitable and efficient for staff and clients. Along with the goal, the TCPB adopted the following recommendations:

- Map the unique challenges and successes of each of the three Coordinated Entry Systems.
- Assess opportunities to create connectivity among the three Coordinated Entry Systems to improve equitable access and work towards regionalizing some tools within Coordinated Entry.
- Explore opportunities for co-enrollment with other systems

With the TCPB goal named, staff from Metro and the three counties formed the Coordinated Entry Regional Work Group (CERWG), meeting nine times, for over 14 hours, to discuss shared CES challenges, Coordinated Entry System Alignment Regional Implementation Plan
October 2024

brainstorm solutions, and develop the strategies within this plan. Stated over-arching challenges included:

- People seeking housing services in multiple counties in the region need to navigate multiple CESs with different processes and policies.
- Agencies who hold service provision contracts with multiple counties in the region need to navigate multiple CESs with different processes and policies.

More specific challenges include:

- Lack of data visibility between the three county CESs stifles efforts to locate people with an offer of housing and identify those who have already been housed in another county.
- Different assessments in different counties, along with lack of data visibility, causes people seeking services to tell their story over and over to be served across the region
- County-established CES prioritization factors need to appropriately contribute to dismantling racial disparities in the homeless population.
- It is not clear which approach to case conferencing (a regular community conversation) would most effectively move people quickly into services through CES.

The CES challenges are regional in nature, and they require regional solutions. Those seeking services and providers navigating the CESs across the region should expect a similar experience, no matter where they are connected, throughout the region. While each county has a unique services system, and a fully regional CES is not being proposed, the three counties and Metro are committed to improving and aligning elements of each county CES to become regionalized.

To this end, this report outlines the following strategies for a regionalized approach to solving these problems:

- Regionalize approaches to prioritization for racial equity
- Align assessment questions
- Regionalize visibility of participant data
- Regionalize approach to case conferencing

Local Efforts:

Clackamas, Multnomah and Washington counties have all put countless hours into planning, implementing, evaluating, and adapting their CE systems for the past decade. Each county has consistently improved their systems, aided by an infusion of Supportive Housing Services funds starting in 2021, and have made great strides in all areas covered in the strategies below. This plan is meant to strengthen and build upon the work that has already been accomplished.

Clackamas County- Coordinated Housing Access

Since receiving SHS funds, Clackamas County has made significant CE enhancements, prioritizing accessibility and equitable service delivery by updating policies, expanding services and assessment

capacity, and increasing engagement with people with lived experience. Clackamas expanded the CE team, drafted a client inactivity policy to be approved soon, expanded prevention and diversion programs, strengthened regional alignment, and increased lived experience voice in decision-making. By hiring additional assessors, the number of people connected to services increased by over 300%, greatly improving system responsiveness. Newly hired staff, with lived experience of homelessness and identifying as members of historically marginalized groups, have provided comprehensive training and support that enhances the effectiveness of the CE team. A proposed new policy for client inactivity will keep the By-Name List (BNL) clean and accurate. Expansions to the prevention and diversion programs—which employ problem-solving and/or flexible funding to resolve the housing crisis, preventing or diverting those seeking assistance from entering the system in the first place—have increased capacity to intervene earlier, preventing longer-term homelessness. A clear CE decision-making structure has been established, including a Core Team composed of at least 60% individuals with lived experience or frontline workers, ensuring that Clackamas County’s decisions are informed by those who are closest to the issues. These initiatives have been recognized with a National Counties Award, highlighting the substantial progress that Clackamas County has made in enhancing the CE system.

Multnomah County- Coordinated Housing Access Team

The Multnomah County CES has used SHS funds to strengthen racial equity approaches throughout the system and expand CE outreach, client assistance, and supportive services. Culturally-specific providers were prioritized in this expansion. Funds were also used to support the final phase of the Coordinated Access Tool redesign. This multi-phase project was initiated in FY 21 to address housing placement disparities for BIPOC and other communities over-represented in homelessness in Multnomah County by designing a new tool and process that is more equitable, trauma-informed, and streamlined. To date, the Joint Office has engaged providers and people with lived experience of homelessness in the development of the new tool. SHS provided the funding needed to support the creation of a lived experience advisory group and complete the final phase of the project, which included training and testing of the new tool, analyzing preliminary outcomes, finalizing the scoring methodology, and making the appropriate changes to launch the new coordinated access assessment and process in October 2024. Our system has also seen an increase in permanent supportive housing (PSH) programming due to SHS funded supportive services. This has significantly expanded the PSH resources that take referrals from the CES and has led to more exits from the CE prioritized lists into housing.

Washington County- Community Connect

Since the implementation of SHS funding, Washington County has significantly updated its Coordinated Entry system, known locally as Community Connect, to expand assessment capacity and incorporate culturally responsive and trauma informed approaches. Washington County updated CE assessments, increased the number of assessors, focused on contracting with culturally specific providers, increased data quality, and collaborated regionally. Soon after receiving SHS funds, Washington County updated its intake assessment with several improvements. Improvements included using a trauma informed lens, reducing the number of questions by focusing on matching participants with the newly funded resources as quickly as possible, and eliminating extensive and exceedingly personal questions. Washington County greatly increased both the number of agencies who are contracted to complete intake assessments and the number of staff at those agencies who are trained to complete intake assessments. Additional work is underway to expand organizations that can provide initial assessments

beyond contracted service providers through a pilot launched this year. Washington County focused on contracting with culturally specific providers to ensure participants who are part of historically marginalized groups could more easily find access points which feel safe and comfortable. Washington County has made strides to increase data quality through additional training opportunities and accessibility of the Homeless Management Information System (HMIS) support staff. More data entry training increases the number of front-line staff willing to completing CES assessments with good data quality, especially those who do not explicitly work in homeless services. Better data quality provides consistent information that allows the system to move people to programs quickly. Washington County has participated in ongoing, collaborative meetings with Clackamas and Multnomah counties to share best practices in assessment and data collection which has continued to increase the strength of our regional system.

Racial Equity Considerations:

Central to the work of the Supportive Housing Services (SHS) Measure is the guiding principle of leading with racial equity and racial justice, with a charge to reduce racial disparities in homeless service outcomes across the region. The counties and Metro have committed to addressing the goals outlined by the Tri-County Planning Body (TCPB) while embedding equity in the development and implementation of our work together.

The regional Coordinated Entry strategies in this document center racial equity, focusing on a plan that will result in measurable improvements in equitable access to housing programs. The historical and contemporary experiences of housing discrimination and systemic racism that influence access to housing programs for Black, Indigenous, and Other Communities of Color, immigrants and refugees, and LGBTQ+ communities, have an impact on people's ability to gain stable housing. These strategies aim to increase participant choice, expand access for historically oppressed communities, and reduce disparities among historically marginalized groups.

To this end, the counties and Metro have established ongoing coordination among coordinated entry and equity staff with a goal of ensuring all strategies contribute to the reduction of racially disparate outcomes. The Coordinated Entry Regional Alignment workgroup recently completed an equity lens analysis using the racial equity lens tool (RELT), developed by Multnomah County.

The RELT analysis took place on Monday, September 9th, 2024. The conversation was facilitated by Alexandra Appleton (Equity Manager) and Abby Ahern (Sr. Housing Policy Analyst) with Metro, with assistance from consultants from Homebase. Representatives from all three counties participated in the conversation. The RELT analysis consists of seven questions. The first question, relating to context and level-setting, was answered during prior conversations. The remaining six questions were discussed during the meeting on September 9th. Based on this discussion, the group agreed on two changes to this proposal, which are listed below and reflected in the relevant sections of this proposal:

- *Adding a RELT analysis to each strategy of this proposal.* Each strategy includes a step to create additional proposals and recommendations. A RELT analysis will be included prior to the approval of those proposals and recommendations.

- *Including steps related to provider feedback in each relevant strategy.* Most strategies include feedback from people with lived experience. Where relevant, a step will be added to each plan to engage providers as well.

Additional questions and notes from this discussion are included in the Appendix.

Planning and Implementation Considerations:

- **Compliance with TCPB Charter:**
The TCPB charter states that the TCPB is, “responsible for developing and implementing a tri-county initiative that will be responsible for identifying regional goals, strategies, and outcome metrics related to addressing homelessness in the region.” To this end, one of the TCPB’s responsibilities is to review proposals that outline programmatic strategies and financial investments from the Regional Investment Fund (RIF) that advance the regional goals, strategies and outcome metrics established in the plan.
- **Feasibility**
The counties and Metro have determined that this implementation plan is feasible to fulfill given the requested funding allocation, appropriate timeline and necessity to include feedback from various advisory bodies.
- **Staff Capacity**
The implementation plan primarily counts on leveraging existing staff capacity and meetings to work together in the operationalization and on-going coordination of the work. The goal related to case conferencing is an exception. It proposes one additional FTE for each community to support coordination of case conferencing. Upon plan implementation, the jurisdictions acknowledge that additional staff capacity may be needed to fulfill the strategies outlined below. This plan also identifies specific tasks to be supported by qualified consultants, extending staff capacity.
- **Infrastructure**
It will take our region time to create a responsive system that addresses regional and local needs in our high-rent, low vacancy communities. As new initiatives launch, roles and responsibilities for each county and Metro must be collaboratively identified. This plan proposes to utilize the expanded capacity of the Metro Housing Department and within each county to lead this work. In addition, Coordinated Entry relies heavily on a well-functioning Homeless Management Information System (HMIS). Coordination between regional HMIS efforts and regional Coordinated Entry efforts remains important.
- **LIP alignment**
Strategies to improve CE on a regional level has been identified as a need in Washington County’s LIP (p. 18), Multnomah County’s LIP (p. 28) and Clackamas County’s LIP (p. 26).

- Unintended consequences

With any big change, come unintended consequences. While the three counties and Metro have worked hard to identify and mitigate any foreseeable consequences, there will always be some things that are not able to be mitigated or not accurately predicted.

Other potential consequences include a general change burden on the system and improper data sharing. Because CE is central to all, or a significant portion of, the homeless services system, making changes to CE has a domino effect across the system. CE staff, program staff, leadership, service providers, and CoC and other review boards all bear some burden in learning and adapting to changes in the system. When sharing data more broadly and/or freely, there is always the increased chance of a data breach or data being shared improperly. Any data sharing agreement will make all attempts to prevent any breach, and yet it is still a possibility that could come with unintended consequences.

- Building on existing efforts-

As highlighted in the background section above, this regional effort would not have been possible without the hard work of each county to create highly functioning CE systems in the first place. Below is a summary of a small portion of the work each county has done to improve their Coordinated Entry systems over the past decade.

Clackamas expanded the CE team, drafted a policy for client inactivity to be approved soon, expanded prevention and diversion programs, strengthened regional alignment, and increased lived experience voice in decision-making. The Multnomah County CES has used SHS funds to expand CE outreach, client assistance, and supportive services. Culturally specific providers were prioritized in this expansion. Multnomah County recently completed a redesign of their coordinated access tool, with the specific goal of addressing racial disparities. Washington County updated CE assessments, increased the number of assessors, focused on contracting with culturally specific providers, increased data quality, and collaborated regionally.

The proposals in this draft plan build on the improvements to coordinated entry made across all three counties. Increased assessment capacity in all three counties have created a solid foundation for a more regional approach to assessment. Multnomah County's recent improvements to their coordinated entry system will provide valuable building blocks and lessons learned for further work taking place across the region.

Regional Implementation Fund (RIF) Budget

To fund these strategies as outlined, it will cost \$1.64 million or less. Milestones will be shared in the TCPB’s monthly progress reports, and more substantial information, including budget expenditure, will be provided quarterly starting in Q3 2025.

Item	Cost
Strategy #1: Data Sharing	\$200,000
Strategy #2: Assessment Alignment	\$50,000
Strategy #3: Prioritization	\$200,000
Strategy #4: Case Conferencing Alignment	\$745,000
<i>Sub-total</i>	<i>\$1,195,000</i>
Proposed on-going spending	
Washington County Community Connect Program	\$447,928
Total	\$1,642,928

Strategy #1: Regionalize Visibility of Participant Data

Program Description

Through this strategy, the three counties will make the necessary changes to their data infrastructure to facilitate the other goals outlined in this plan, as well as increasing visibility of client records in instances where clients seek services in multiple counties. The three counties will develop and implement a list of changes to cross-county data visibility, with input from providers and people with lived experience, as well as the local HMIS Governance/Control Board. The counties will consider both technical aspects of the changes to HMIS, as well as changes to releases of information (ROI's) and privacy notices in the three counties.

This strategy will increase client-level data visibility across county lines via HMIS, both in terms of individual assessment responses and information about movement through the homeless response systems in all three counties. Allowing for visibility into clients' movement and service history across the region acknowledges the regional nature of homelessness, improves the ability of service providers to collaborate, reduces duplication of efforts, and improves the quality of services that can be provided to clients with ties to multiple communities across the region.

Timeline and Milestones

Milestones will be shared in the TCPB's monthly progress reports, and more substantial information will be provided quarterly starting in Q3, 2025, to align with current SHS program reporting frequency.

It is anticipated that the items listed in the chart below will be complete between August 2026 and February 2027, with an interim benchmark in October 2025 described in the chart below. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Phase	Deliverables	Details/Steps	Responsible Party
1	<p>List of proposed changes to the regional data-sharing infrastructure – vetted and approved by providers, people with lived experience, and the HMIS Control / Governance Board</p> <p>INTERIM BENCHMARK: This list of proposed changes will be prepared by October 2025.</p>	<ol style="list-style-type: none"> 1. Confirm current data visibility capabilities between counties and create initial draft "wish list" for proposed changes to cross-county data visibility. 2. Discuss draft changes with HMIS Control/Governance Board. 3. Collect and incorporate feedback from providers and people with lived experience regarding desired changes to visibility. 4. Run proposed changes to data 	Contracted consultant (Metro), county staff (Coordinated Entry leads)

		<p>visibility by County Counsel offices and other coordinated entry partners.</p> <ul style="list-style-type: none"> a. Work with County Counsel to identify necessary changes to county privacy notices and ROI's. <p>5. Close the loop with providers, people with lived experience, and the HMIS Control/Governance Board.</p> <p>6. Conduct RELT analysis on proposed changes to data sharing capabilities</p>	
2	Implement proposed changes to HMIS, and relevant ROI's and privacy notices	<ul style="list-style-type: none"> 1. Make changes in county HMIS systems, including changes to ROI's and privacy notices, to reflect increased visibility between counties. 2. Train frontline staff on changes to visibility in HMIS. 	County staff (Coordinated Entry leads and HMIS leads)

Regional Investment Fund Utilization

Exact cost determinations will be developed as this strategy is implemented, staffing needs arise within counties, and scopes of work are defined with consultants.

Budget
Consultant to facilitate feedback processes with providers and people with lived experience
Compensation for people with lived experience who participate in feedback processes
Funding for HMIS admins to implement changes to data visibility between counties
Total: \$200,000

Metrics

Because this goal is largely in support of the other goals articulated in this plan, the metrics associated with those goals also serve as success measures for this goal. Additionally, due to the effort required to agree upon and implement changes to HMIS in multiple counties, the end date of **February, 2027**, can serve as the primary benchmark for the success of this goal. As the plan develops, additional metrics may be added to support this goal.

Strategy #2: Align Assessment Questions

Program Description

Through this strategy, the three counties and Metro will align assessment practices to streamline cross-county access to housing by reducing the need for reassessment in different counties.

Clients with connections to multiple counties, wishing to access services in those counties, face the burden of extensive re-assessment and potential re-traumatization. The three counties and Metro will undertake an analysis of assessment question sets in the Metro region, map out similarities, and explore related data sharing actions to reduce the need for reassessment and burden on clients to continue to share their stories and housing journeys. Assessment questions and any related necessary data sharing actions will be reviewed by county coordinated entry staff and other invested parties. Leveraging the existing Coordinated Entry Regional Alignment Workgroup meetings, county and Metro staff will work together in the ongoing coordination and implementation of this strategy.

The role that each county will play in conducting assessments on behalf of other counties, and making referrals across county lines will be determined collaboratively, with the approval of CoC Boards in each county, as this plan is implemented. This effort will increase system alignment through the identification of same or similar assessment questions and implementation of assessment question and process changes to reduce the need for reassessment. This effort will also make it easier for people to access services, while minimizing to the extent possible how much of their story they need to repeat. This effort will allow providers to more consistently and easily assess participants, view assessment responses across county lines, and provide more trauma-informed coordinated entry services.

Timeline and Milestones

Milestones will be shared in the TCPB's monthly progress reports, and more substantial information will be provided quarterly starting in Q3, 2025, to align with current SHS program reporting frequency.

It is anticipated that the items listed in the chart below will be complete between August 2026 and February 2027, with an interim benchmark in August 2025 described in the chart below. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Phase	Deliverables	Details/Steps	Responsible Party
1	Assessment question map highlighting similar and identical questions across communities	<ol style="list-style-type: none">1. Share most recent assessment questions and response options2. Map assessment questions using the most recent versions of assessments for each community3. Identify questions that are identical or similar enough across county lines that counties can share responses for coordinated entry participants seeking housing in multiple counties4. Decide whether to conduct unique	Contracted consultant (Metro), county staff (Coordinated Entry leads)

		questions as an added community-specific assessment or identify an alternative approach	
2	INTERIM BENCHMARK: Prioritized list of proposed assessment workflow changes by August 2025	<ol style="list-style-type: none"> 1. Explore how participants may access community-specific assessments when seeking housing in multiple counties 2. Consider additional questions as needed to support Medicaid eligibility, medical case conferencing, PSH eligibility, and prioritization 3. Organize assessment workflow changes by priority and ease of implementation, with a proposal to consider changes that are easily implementable, and incorporate learnings into future changes 4. Conduct RELT analysis on proposed new assessment and process 	County staff (Coordinated Entry leads), contracted consultant (Metro)
3	Assessment and workflow changes are implemented	<ol style="list-style-type: none"> 1. Run proposed changes to questions and assessment process by coordinated entry partners and CoC Boards 2. Share client-level assessment response data amongst communities 3. Address HMIS set-up needs to reflect assessment overlaps and unique community questions 4. Train front-line staff on changes to HMIS and assessment visibility options 5. Pursue continuous quality improvement to continue to align assessments as time goes on 	County staff (Coordinated Entry leads), contracted consultant (Metro)

Regional Investment Fund Utilization

Exact cost determinations will be developed as this strategy is implemented, staffing needs arise within counties, and scopes of work are defined with consultants.

Budget
Consultant to conduct research and analysis, create a proposal for assessment workflow changes by priority and ease of implementation, and begin continuous quality improvement process
Total: \$50,000

Metrics

These metrics may be changed or refined during the first phase of implementation after mapping assessment questions and organizing assessment changes by priority and ease of implementation, and new metrics may be added.

Metric	Goal	Data Source
Assessor experience is improved	A goal will be set as part of the CQI action step (#12)	Future qualitative data source to be identified
People seeking housing experience is improved	A goal will be set as part of the CQI action step (#12)	Future qualitative data source to be identified
Coordinated entry participants experience streamlined connections to service options fitting their needs	A goal will be set as part of the CQI action step (#12)	HMIS data on time between date of initial assessment to referral Future qualitative data source to be identified

Strategy #3: Regionalize Approaches to Prioritization for Racial Equity

Program Description

This strategy proposes one unified process for all three counties to conduct an analysis of racial/ethnic groups disproportionately impacted by homelessness and to identify and test coordinated entry prioritization strategies to address those disparities. This strategy will build on the ongoing efforts of the counties to monitor and evaluate racial equity and implement equity-focused prioritization strategies.

Through this strategy, the three counties and Metro will identify vulnerability factors that disproportionately impact communities of color in the Metro region and conduct a pilot to leverage coordinated entry systems to prioritize persons affected by these vulnerabilities for housing referral. To identify vulnerability factors, the three counties and Metro will undertake an analysis of racial and ethnic groups disproportionately impacted by homelessness in the Metro region. These potential factors will be evaluated to the extent possible using existing data collected by the counties and will be reviewed by legal counsel, county-specific coordinated entry partners, CoC Boards, and people with lived experience of homelessness. Current strategies leveraged by counties will be examined and research will be conducted to identify potential coordinated entry prioritization factors to address existing disparities. Once the factors and any new assessment questions are finalized, the Counties and Metro will develop a pilot to test their impact. As certain counties are still in the process of evaluating previous efforts to change their prioritization systems, counties will have latitude to choose how much they engage in the pilot, or which aspects of the proposed new system they will pilot. The pilot will run for six months, after which the results will be evaluated to identify the new prioritization factors' effectiveness in advancing equity.

Leveraging the existing Coordinated Entry Regional Alignment Workgroup meetings, county and Metro staff will work together in the operationalization and on-going coordination of the implementation of this strategy.

In addition to advancing equity in prioritization for housing across all three coordinated entry systems, this effort will increase system alignment through the completion of the standardized equity analysis and implementation of common or similar prioritization strategies to address shared equity issues.

Timeline and Milestones

Milestones will be shared in the TCPB's monthly progress reports, and more substantial information will be provided quarterly starting in Q3, 2025, to align with current SHS program reporting frequency.

It is anticipated that the items listed in the chart below will be complete between December 2026 and June 2027, with an interim benchmark in July 2025 described in the chart below. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Phase	Deliverables	Details/Steps	Responsible Party
1	<ul style="list-style-type: none"> • Standardized equity analysis across Metro region • Landscape assessment of existing prioritization strategies leveraged by counties to address inequities • Initial draft list of prioritization factors to consider for broader regional implementation 	<ol style="list-style-type: none"> 1. Identify racial/ethnic groups disproportionately impacted by homelessness in the Metro region <ul style="list-style-type: none"> ○ Review existing equity analyses that have been completed by the counties ○ If needed, develop a data analysis framework in consultation with county data teams to collect and analyze additional data to understand disparities 2. Identify and evaluate current/emerging prioritization strategies leveraged by counties to advance equity 3. Develop a list of potential prioritization factors to consider for broader regional implementation 	County staff (Coordinated Entry leads), Contracted consultant (Metro)
2	<ul style="list-style-type: none"> • Finalized proposed list of prioritization factors to pilot • INTERIM BENCHMARK: Approved list of prioritization factors (including any new assessment questions as needed) by July 2025. 	<ol style="list-style-type: none"> 1. Run list of potential prioritization factors by county counsel offices and legal counsel specializing in Fair Housing and county coordinated entry partners 2. Identify and evaluate any alignment with current assessment questions and explore opportunities to model prioritization factors using existing data 3. Conduct RELT analysis of potential prioritization factors and make any changes that emerge 	County staff (Coordinated Entry leads), contracted consultant (Metro)

Phase	Deliverables	Details/Steps	Responsible Party
		<ol style="list-style-type: none"> 4. Obtain feedback on prioritization factors from persons with lived experience of homelessness 5. Obtain feedback from providers, with a specific focus on culturally specific providers. 6. Reach consensus re: prioritization factors to pilot and counties that will participate in piloting 	
3	<ul style="list-style-type: none"> • Standardized plan to pilot them and evaluate their impact 	<ol style="list-style-type: none"> 1. Run new prioritization factors by county counsel offices, legal counsel specializing in Fair Housing, CoC Boards, and other county-specific coordinated entry partners 2. Develop any new assessment questions needed to implement new prioritization factors in piloting counties 3. Conduct RELT analysis of new prioritization factors and assessment questions and make any changes that emerge 4. Define pilot parameters 5. Create accessible communication materials describing the new proposed prioritization system, to be shared with providers and people with lived experience of homelessness 6. Close the feedback loop with persons with lived experience of homelessness and providers. 	County staff (Coordinated Entry leads), contracted consultant (Metro)

Phase	Deliverables	Details/Steps	Responsible Party
4	<ul style="list-style-type: none"> Completed pilot impact evaluation 	<ol style="list-style-type: none"> Pilot new prioritization factors (including any new assessment questions) and re-evaluate after 6 months 	County staff (Coordinated Entry leads), contracted consultant (Metro)
5	<ul style="list-style-type: none"> Updated prioritization policy adopted by counties 	<ol style="list-style-type: none"> Draft changes to counties' prioritization policies based on results of pilot Review and approval of these policies by coordinated entry partners 	County staff (Coordinated Entry leads), contracted consultant, Metro

Regional Investment Fund Utilization

Exact cost determinations will be developed as this strategy is implemented, staffing needs arise within counties, and scopes of work are defined with consultants.

Budget
Consultant to conduct research and analysis, draft new prioritization protocols and assessments, facilitate the framing of the pilot, and engage providers and people with lived experience of homelessness
Compensation for people with lived experience of homelessness
Legal counsel to review prioritization factors considering Fair Housing requirements
Consultant to support in administering and evaluating the pilot
Total: 200,000

Metrics

These metrics may be changed or refined as the plan develops, particularly during the third phase of implementation of this plan as part of the process of defining pilot parameters. New metrics may also be added.

Metric	Goal	Data Source
Increase in prioritization rate for racial and ethnic groups disproportionately impacted by homelessness a (i.e., referral rate > assessment rate for disadvantaged demographics)	A goal will be set during the third phase of implementation	HMIS data on coordinated entry assessments and referrals disaggregated by race and ethnicity
People with lived experience of homelessness support the new prioritization factors and assessment questions	80% of black, indigenous, and other people of color with lived experience of homelessness who are surveyed support the new model	Survey at step 12 (closing the feedback loop)

Strategy #4: Regionalize an Approach to Case Conferencing

Program Description

Through this strategy, the three counties will identify and adopt standardized case conferencing practices, aiming to reduce the length of time that people experiencing homelessness spend in the coordinated entry system. Counties will create an infrastructure for inter-community learning and collaboration on the topic of case conferencing, adopt a shared statement of purpose for case conferencing across the three counties, and adjust community infrastructure to support more efficient and participatory case conferencing meetings.

Case conferencing is a critical tool in each county’s coordinated entry system. This strategy proposes to align the three counties in a shared purpose for case conferencing and to adopt common practices across all three counties. More uniform case conferencing practices will create a more consistent experience for those seeking services, allow counties to share information and successful practices, create a more uniform experience for providers, and allow each county to capitalize on the opportunities for alignment outlined in other areas of this plan—prioritization, assessment, and data sharing.

Timeline and Milestones

Milestones will be shared in the TCPB’s monthly progress reports, and more substantial information will be provided quarterly starting in Q3, 2025, to align with current SHS program reporting frequency.

It is anticipated that the items listed in the chart below will be complete between August 2026 and February 2027, with an interim benchmark in June 2025 described in the chart below. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Phase	Deliverables	Details/Steps	Responsible Party
1	<p>Statement of shared purposed for case conferencing, co-created by the three counties, and approved by coordinated entry partners and other interested parties in each county.</p> <p>INTERIM BENCHMARK: Statement of shared purpose approved by June 2025.</p>	<ol style="list-style-type: none"> 1. Case conferencing information exchange – Representatives from each county attend case conferencing meetings in each of the two other counties in the Metro region, and document key learnings and potential practices to implement in their home counties. 2. National scan of case conferencing best practices. 3. In-person tri-county case conferencing design meeting(s), including representatives from provider organizations, to 	Contracted consultant (Metro), county staff (Coordinated Entry leads)

Phase	Deliverables	Details/Steps	Responsible Party
		<p>discuss potential solutions for aligning a shared purpose for case conferencing across the region, improving meeting attendance, and automating key case conferencing functions.</p> <ol style="list-style-type: none"> 4. Finalizing statement of shared purpose. 5. Obtaining approval of statement of shared purpose from Coordinated Entry partners in each county. 6. Conduct RELT analysis on statement of shared purpose for case conferencing 	
2	Identifying and implementing strategies to automate key case conferencing functions, and improve meeting attendance.	<ol style="list-style-type: none"> 1. Identify strategies to automate case conferencing functions and improve meeting attendance. 2. Obtain feedback on proposed changes from coordinated entry partners. (e.g. any changes to HMIS infrastructure, contracts or MOU's with providers, or other changes requiring higher level approval) 3. Implement strategies to automate case conferencing functions. 4. As needed, train frontline staff on changes. 	Contracted Consultant, county staff (Coordinated Entry leads and HMIS leads)

Regional Investment Fund Utilization

Exact cost determinations will be developed as this strategy is implemented, staffing needs arise within counties, and scopes of work are defined with consultants.

Budget
Consultant to conduct national scan and facilitate case conferencing design meeting(s)
Technical consultant to manage automation process with HMIS.
Funding for HMIS admins to implement changes related to automating case conferencing functions
New designated staff, representing full or partial FTE's in each county, to coordinate case conferencing meetings in each community
Total: \$745,000

Metrics

Metrics may be changed or refined as the plan develops, particularly during phase 2 of the implementation of this plan, after a shared statement of purpose for case conferencing has been adopted, and some potential changes have been identified to improve meeting attendance and automate some key case conferencing functions.

Metric	Goal	Data Source
Reduced length of time from assessment to match, and match to move-in for those who are case conferenced.	A goal related to length of time in coordinated entry will be set during the Design Meeting proposed in Phase 1, or when identifying strategies at the beginning of Phase 2.	HMIS data related to average length of time in each phase of coordinated entry. By-name list data for those who are case conferenced.
Better attendance and more frequent participation in case conferencing by providers.	A goal will be set during Phase 2 of this plan.	Case conferencing attendance tracking mechanisms and/or participant surveys, to be identified during Phase 2 of this plan.
Greater provider satisfaction with case conferencing meetings.	A goal will be set during Phase 2 of this plan.	participant surveys, to be identified during Phase 2 of this plan.

Appendix: RELT Analysis Notes

Data and Historic Experience: How is data and historic experience informing decision making? How are you collecting, reviewing, and analyzing demographic data to inform the proposal?

These data sources informed this draft implementation plan, and will inform its implementation: HMIS, provider conversations, census data, and data from Unite Us. From regular review of coordinated entry data, counties have knowledge of the racial disparities that exist for clients connecting to and moving through coordinated entry. Homebase also conducted focus groups with 55 people with lived experience of homelessness across the three counties in the Metro region. Some feedback from those focus groups was incorporated into this plan, and will continue to be reviewed during the implementation of this plan.

Strategies for Racial Equity: 1. Who will benefit or be burdened by the proposal? Identify impacted communities and groups. A. Which group(s) may experience disparities related to the proposal? B. What are the racial demographics impacted by the proposal? C. What intersectional identities will be impacted by the proposal? D. Will the proposal have different impacts within different geographic areas? E. Are those most burdened, represented at the decision-making table? (If not, why not?) 2. What are your strategies for advancing racial equity or mitigating unintended consequences?

The proposal intends to benefit people experiencing homelessness, with a focus on people who identify as BIPOC, by reorganizing the system with an aim to reduce disparities. More granular demographic data should be reviewed during implementation of this plan, and extra care should be taken to ensure that those in rural parts of counties are represented in decision making. Providers may experience an extra burden as more people who identify as BIPOC are prioritized for services with culturally specific providers whose services are targeted to BIPOC populations being particularly at risk. Proposed strategies to mitigate this burden include: providing financial support to culturally specific providers, identifying flexibilities in other deadlines for providers that would help prioritize this work, and more mindful communication with providers (e.g. combining requests and rolling out strategies and training together, as opposed to piecemeal). The group also proposed doing a RELT analysis during each relevant phase of the implementation for each strategy.

Community and Stakeholder Engagement and Input: How have communities and stakeholders been engaged? What is the objective of the engagement? What opportunities exist to expand or enhance community/stakeholder engagement and input?

Counties, CoC Boards, and people with lived experience have been engaged in the development of this proposal. Provider engagement needs to be added to the implementation strategies. Providers and people with lived experience spend a lot of time providing feedback to homeless services systems, and there needs to be more robust coordination to ensure that feedback is taken into consideration appropriately, and to ensure that requests for feedback are not duplicative. For example, the region could explore using a database to track different kinds of feedback across the relevant jurisdictions. This

would be especially impactful for access to readily available input from people with lived experience of homelessness.

Barriers: Please share any systemic barriers that have been identified related to this project or process.

Barriers identified by participants include: the lack of affordable housing across all three counties; differing definitions of homelessness among funders, providers, and people experiencing homelessness, especially in some culturally specific communities; many different approaches to addressing homelessness between funders, providers, jurisdictional staff and elected officials can sometimes make it hard to be successful on any one approach; resistance to access coordinated entry among some people currently experiencing homelessness, due to perceptions of safety or previous negative experiences; challenges obtaining accurate and comprehensive data through HMIS.

Draft Plan Revision: Based on your response to the previous question, what are possible revisions to the proposal under construction? What other processes in this proposal will need a racial equity lens tool application? When will the racial equity lens be applied during these processes?

Based on this discussion, the group agreed on two changes to this proposal, which are listed below and reflected in the relevant sections of this proposal:

- *Adding a RELT analysis to each strategy of this proposal.* Each strategy includes a step to create additional proposals and recommendations. A RELT analysis will be included prior to the approval of those proposals and recommendations.
- *Including steps related to provider feedback in each relevant strategy.* Most strategies include feedback from people with lived experience. Where relevant, a step will be added to each plan to engage providers as well.

This RELT analysis included additional suggestions and recommendations, which will be considered during the implementation of the plan.

Implementation: What is the plan for the proposal implementation? Who is accountable for the implementation? How will the proposal be evaluated? Who is responsible for evaluating the proposal's success? What communication strategies will be used to notify communities of the proposal, implementation and evaluation plan(s)?

The counties will be largely responsible for the implementation of the plan. Metro, in partnership with the three counties, will hold responsibility for leadership, convening, communication, regional alignment, and ensuring timelines and outcomes. This proposal also includes requests for consultation support with data analysis, drafting of additional proposals and recommendations, and some facilitation support. The group noted that communication and evaluation plans will be developed during the implementation of each of the strategies.

METRO SUPPORTIVE HOUSING SERVICES TRI-COUNTY PLANNING BODY

Monthly progress report | October 2024

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

TRI-COUNTY PLANNING BODY REGIONAL GOALS*

Goal	Progress
Regional Landlord Recruitment	Metro and county staff are continuing to coordinate on the implementation of strategies in the Regional Landlord Recruitment adopted by the TCPB, including meeting monthly in the Regional Landlord Recruitment Workgroup. The Workgroup met on September 25, 2024 to review the Regional Landlord Recruitment Plan with a Racial Equity Lens Tool, developed by Multnomah County, to ensure strategies further racial equity and contribute to the reduction of racially disparate outcomes in housing placement and retention. To begin implementing the Plan’s Strategy #1: Communication and education plan, Metro staff are working to create a webpage on Metro’s website with information on county landlord financial incentives. Metro is also working to bring on a consultant to support work related to Strategy #2: Align financial incentives and Strategy #5: Investigate needs for property management.
Coordinated Entry	The Coordinated Entry Regional Alignment Workgroup (CERAW) continues to meet regularly. A new strategy, move-in readiness, has been introduced to help speed the move-in process for program participants. Counties and Metro are discussing the merits of adding this strategy to the CE regional plan. The CERAW has shaped the workplans, timelines, budgets and metrics for each strategy (assessment alignment, data sharing, prioritization alignment, case conferencing, and move-in readiness). On Sept 9 th , the CERAW will complete a final review of the CE regional plan, including running a racial equity lens tool, which will be supported by Metro Equity Manager Alexandra Appleton. Rounds of review and edits by County and Metro Housing leadership will begin on 9/13. CoC and CE boards for each county are being informed of their future role in decision-making as the regional CE plan is

implemented. The CE regional plan will be presented to the TCPB at the October meeting.

Healthcare system alignment

The regional planning workgroup with Health Share, Counties, and Metro, with support from Homebase has begun drafting the implementation plan using a shortlist of potential strategies. These are regional opportunities to support, supplement, and advance existing health and housing system alignment initiatives as documented in the landscape analysis. The draft implementation plan will be refined over the coming months with regional leadership, providers, and other partners and is currently scheduled to come to TCPB in January 2025. The data sharing workgroup continues to meet, learning from existing data sharing agreements (DSAs) across the region to discuss regional data sharing infrastructure, including data sharing agreements, protocols, practices, and infrastructure implementation plan.

Training + Technical Assistance

The Regional Capacity Team is continuing our work of scoping out a baseline training or certification for incoming housing service workers. Next month, we're looking forward to presenting our findings on post-secondary education pathways we might consider pursuing in this goal.

The team is also focused on a developing a technical assistance demonstration project focused on adding capacity to our region's Permanent Supportive Housing providers and measuring effectiveness of technical assistance interventions.

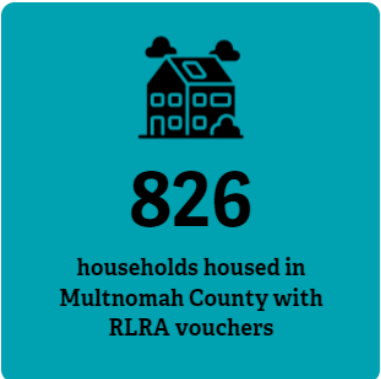
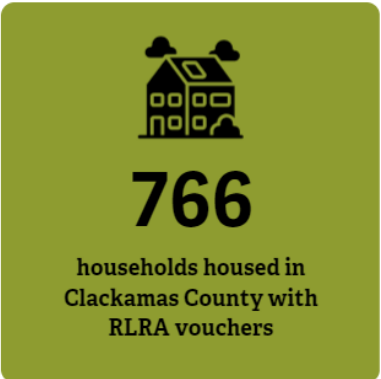
Employee Recruitment and Retention

We have launched a tri-county workgroup to draft a regional plan using Homebase's framework which included three areas: Commitment to and Coordination of a Regional Strategy; Planning for and Allocating More Funding to Compensation; Addressing the Cashflow Concerns for Providers. Specific concepts within these areas will be explored and refined in the coming months to develop the Regional Implementation Plan, currently scheduled to come to TCPB in May 2025. Outreach and engagement will continue, including with providers and with local and state workforce and contract-related initiatives.

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

EXISTING REGIONAL PROGRAMS AND COORDINATION EFFORTS

***Households housed through the RLRA program as of June 30, 2024:**



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

*As of 8/15/2024, Metro has updated the way numbers are reported on our SHS dashboards. Beginning at the end of Year 3, Metro has shifted to reporting the number of households served with SHS resources. We are no longer reporting the number of people served, as several people can be members of the same household which has been served with SHS resources. Please note: This will cause the number on the dashboard to appear smaller, even though SHS service levels have only continued to increase.

Risk Mitigation Program: All RLRA landlords are provided access to a regional risk mitigation program that covers costs incurred by participating landlords related to unit repair, legal action, and limited uncollected rents that are the responsibility of the tenant and in excess of any deposit as part of the RLRA Regional Landlord Guarantee.

The following information is derived from the counties' [FY2022-2023 annual reports](#)

Landlord Liaison and Risk Mitigation Program: In January 2023, Metro and tri-county program staff began meeting monthly to coordinate Landlord Liaison and Risk Mitigation Program education activities. Together, staff shared existing engagement tools and identified innovative methodologies for expanding unit availability across the region. Training for existing landlords is coordinated regionally and staff continues to coordinate to identify strategies for expanding unit availability.

Regional Point-in-Time Count: In January 2023, the counties conducted the first-ever fully combined regional Point-in-Time Count. This tri-county coordinated effort included creating a shared methodology and analysis, a centralized command structure, and unified logistics around

the recruitment and deployment of volunteers. As a result of the combined Count, analyses include regional trends in unsheltered homelessness, sheltered homelessness, and system improvements made possible by regional investments in SHS.

An initial summary of the 2023 Point-in-Time Count data can be found in this May 2023 press release from Multnomah County: <https://www.multco.us/multnomah-county/news/news-release-chronic-homelessness-number-falls-across-tri-county-region-2023>.

Regional Request for Program Qualifications: This program year also included a Regional Request for Programmatic Qualifications to procure new and diverse organizations as partners for service provision. Tri-county partners worked to ensure broad engagement and technical assistance to support the full participation of new and emerging organizations, especially culturally specific service providers. 60 applications were qualified to create a broad network of 167 tri-county pre-qualified service providers with diverse expertise and geographic representation.

Homeless Management Information System (HMIS) Regional Implementation: Starting in 2023, an updated Privacy Notice & Policy created a more trauma-informed and person-centered approach to obtaining participant consent for data sharing while maintaining a high level of data privacy. Next steps included moving toward regional visibility and more comprehensive integration of each of the counties' HMIS systems.

TRI-COUNTY PLANNING BODY GOAL AND RECOMMENDATION LANGUAGE

May 10th, 2023

COORDINATED ENTRY

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

REGIONAL LANDLORD RECRUITMENT

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

HEALTHCARE SYSTEM ALIGNMENT

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

TRAINING

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

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

TECHNICAL ASSISTANCE

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

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

EMPLOYEE RECRUITMENT AND RETENTION

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

Recommendations: Map current wage and benefit conditions.

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

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

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

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

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



Supportive Housing Services Oversight Committee Meeting Summary

Meeting: Supportive Housing Services (SHS) Oversight Committee Meeting
Date: August 26, 2024
Time: 9:30 a.m. to 12:00 p.m.
Place: Virtual meeting (Zoom)
Purpose: Metro tax collection and disbursement update; tri-county planning body coordinated entry progress report; and FY24 Q4 presentations and discussion.

Member attendees

Jim Bane (he/him), Mitch Chilcott (he/him), Co-chair Susan Emmons (she/her), Dan Fowler (he/him), Cara Hash (she/her), Carter MacNichol (he/him), Felicita Montebianco (she/her), Jeremiah Rigsby (he/him), Peter Rosenblatt (he/him), Mike Savara (he/him), Co-Chair Dr. Mandrill Taylor (he/him)

Absent members

Margarita Solis Ruiz (she/her), Jenny Lee (she/her)

Elected delegates

Washington County Chair Kathryn Harrington (she/her), Metro Councilor Christine Lewis (she/her), Multnomah County Chair Jessica Vega Pederson (she/her)

Absent elected delegates

Clackamas County Chair Tootie Smith (she/her), City of Portland Mayor Ted Wheeler (he/him)

Metro

Yesenia Delgado (she/her), Breanna Hudson (she/her), Yvette Perez-Chavez (she/her), Israel Bayer (he/him), Patricia Rojas (she/her), Liam Frost (he/him), Josh Harwood (he/him), Rachael Lembo (she/her)

Kearns & West Facilitator

Ben Duncan (he/him)

Welcome and Introductions

Ben Duncan, Kearns & West, opened the meeting by offering time for members of the Committee to share reflections on Co-chair Susan Emmons' impact on the Committee before her departure from her role.

Co-chair Dr. Mandrill Taylor thanked members of the Committee for their time and ongoing commitment. He and Mike Savara thanked Co-chair Susan Emmons for her leadership and vision.

Co-chair Susan Emmons shared reflections about her time on the Committee and thanked other members for their commitment to the work to advance the shared vision of the Committee. She shared her excitement about new members and the direction the Committee is moving.

Other members and Metro staff shared reflections and appreciation for Co-chair Susan Emmons' leadership and impact.

Patricia Rojas, Metro, provided an update on Metro's COO recommendations on affordable housing to Metro Council, sharing that Metro Council has begun to explore the recommendations through

Supportive Housing Services Oversight Committee Meeting Summary

work sessions and elected-to-elected conversations. She thanked the Committee for their continued engagement.

Peter Rosenblatt shared that the Clackamas County Board of Commissioners implies that there is poor communication from Metro on supportive housing and asked for clarification on the communication between Metro and counties.

Metro staff responded that elected-to-elected conversations are occurring on the topic.

Ben reviewed the meeting agenda and purpose.

The Committee had a quorum and approved the July Meeting Summary. Carter MacNichol abstained because he was absent from the July meeting.

Conflict of Interest Declaration

Peter Rosenblatt declared that he works at Northwest Housing Alternatives, which receives SHS funding and sits on the Continuum of Care Board of Clackamas County.

Dan Fowler declared he is Chair of the Homeless Solutions Coalition of Clackamas County, which receives SHS funding.

Carter MacNichol declared that he sits on the Board of Directors of Transition Projects, which receives SHS funding.

Public Comment

No public comments were received.

Update: Metro Tax Collection and Disbursement

Josh Harwood, Metro, noted that he will be attending Committee meetings more regularly to answer questions about the budget and forecasting. He provided an overview of the forecast, including that July tax collections continued to trend slightly higher than prior years, bringing FY 2023-24 collection totals up to \$335.1 million, or about 6% below the Fall 2023 forecast. He noted that this discrepancy is likely below regular forecasting error, and monthly collections have varied over the last three fiscal years. The month-to-month variability and final tax collection amount is dependent on a small set of the highest bracket of taxpayers. He shared that the shortfall in tax collections is largely due to a lagging economy, noting that Oregon ranks last in the country in year-over-year employment growth. He noted that there are other factors affecting tax collections, which will be shared in the year-end report in November.

Committee members had the following questions and comments:

- **Question:** Would it be prudent for counties to take a more conservative approach by not spending money during the year to support year-over-year programming, and instead to wait for rollover funds?
 - **Metro response:** That is a policy question for counties partially, so Metro cannot fully answer the question. Being more conservative could be one way to deal with the volatility, and there could be other ways to deal with it too.
- **Comment:** It seems like the Committee would want to be supportive of counties trying to be more conservative with their spending given the volatility of tax collections, but that does not seem to be the case because of public concern about unspent dollars for housing.
- **Question:** Can Metro share more information about reserves and contingency requirements?

Supportive Housing Services Oversight Committee Meeting Summary

- **Metro response:** Metro requires a 10% reserve minimum, so the 6% shortfall would be covered by that reserve. Metro recommends counties establish a 15% stabilization reserve to account for volatility; however, counties can also decide to make their reserves higher or lower than this 15% recommendation.
- **Question:** Could Metro share more about the \$800,000 pending appeal that is mentioned in the meeting packet?
 - **Metro response:** Metro cannot share details about the case, but Metro is withholding this amount from July revenue in case Metro loses the appeal.

Josh offered to schedule time with a sub-group of interested members of the Committee to discuss tax collections and disbursements in more detail. Felicita Monteblanco expressed interest in participating.

Rachael Lembo, Metro, noted that Metro is hiring a new housing tax manager who will be present at future Committee meetings, meaning she will not participate as regularly. She thanked the members of the Committee.

Co-chair Susan Emmons thanked Rachael for her support over the years.

Presentation: Tri-county planning body (TCPB) coordinated entry progress report

Yessenia Delgado, Metro, shared an overview of the TCPB's leadership on and involvement with the six stated regional goals, including coordinated entry. She shared that the presentation is intended to share information on the progress of coordinated entry efforts with the Committee.

Abby Ahern, Metro, presented the background, goals, and updates on the work to streamline the three counties' coordinated entry systems. After sharing a brief history of coordinated entry and an overview of the process, she discussed the findings of a national scan of regional alignment efforts for continuums of care, which found several instances of alignment but no other regions attempting the same level of integration. Abby shared an update on current work related to coordinated entry, including a regional alignment workgroup; interviews with other communities, providers, and systems leaders in all three counties; and recruitment for lived experience cofacilitators to lead listening sessions (complete). She then presented emerging coordinated entry system alignment opportunities, including advancing equity via prioritization, aligning assessment questions, standardizing case conferencing, and sharing data. Next steps include continuing workgroup meetings and developing an implementation plan for TCPB review.

The Committee had the following questions and comments:

- **Question:** What metrics are being used to assess the efficiency of the streamlined coordinated entry system? What infrastructure is in place or could be in place for reporting issues, problems, etc.?
 - **Metro response:** There will be metrics to demonstrate the effectiveness of each of these plans, mostly to evaluate the time from an individual's assessment to moving into housing, e.g. There will be equity-related measures too.
- **Question:** Why are Metro and the counties continuing to use the less flexible Department of Housing and Urban Development (HUD) coordinated entry system when we could create our own, more flexible system?
 - **Metro response:** The HUD system speaks to the systems in each county, even if they are different from each other. Also, Metro and the counties do not want to fully give up the HUD framework for coordinated entry because they want to remain eligible for HUD funding. Metro thinks that using the relatively loose

Supportive Housing Services Oversight Committee Meeting Summary

HUD system as a framework and designing a more streamlined system within that framework gives us the best of both worlds.

- **Question:** Can you give an example of how prioritization works? Who makes prioritization decisions?
 - **Metro response:** Currently, prioritization uses length of time homeless and a vulnerability score (determined by counties). The goal is to assess a community and understand what makes it more likely to experience homelessness than other communities. In other words, it is determining the societal factors that impact communities' likelihood of becoming homeless, and then prioritizing those communities with housing access and support.
- **Comment:** In Clackamas County, there has been discussion about the unintended consequences of prioritization. For example, providers have had empty shelter spots because they are directed to serve the most vulnerable populations, but these populations can sometimes be difficult to connect with and move into shelters, resulting in unused shelter slots. This interpretation of prioritization has created a tension, because I do not think anyone intends for there to be unfilled shelter slots.
 - **Metro response:** This can be a real tension, but SHS' goal of ending chronic homelessness will require serving people that are the most vulnerable. This goal could change prioritization and programming at the county level, which could be a challenge.

Presentation and Discussion: County Fiscal Year 2023-24 Q4 Reports

Yesenia shared an overview of the fiscal year reports for each county and the plan to share an annual report for the counties, due at the end of October.

Each county presented on successes and opportunities for further improvement over the fiscal year. Lauren Decker, Clackamas County, shared county-level progress for the past fiscal year, including that the county exceeded its quantitative housing goals in its annual work plan. Lauren also provided updates on the county's Coordinated Housing Access (CHA) Hotline and other highlights.

Breanna Flores and Cristal Otero, Multnomah County, presented county-level progress for the past fiscal year and highlighted work still to be done. SHS housing outcomes placed 76% more people in Multnomah County into housing compared to the year prior.

Nicole Singh, Washington County, shared updates on Washington County's progress on SHS Year 3 goals, including launching its rental assistance only program and challenges with housing placement goals.

The Committee had the following questions and comments:

- **Comment:** In the past year, more housing resources to the counties have come from the State, so the counties have had to balance the spending and associated goals and metrics of SHS funding with the ambitious goals of the State.
- **Question:** What does it mean that Washington County has reduced invoice time to 18 days?
 - **County response:** Once all invoicing documents and forms are complete, then an invoice is processed and paid to a vendor within 18 days.
- **Comment:** The counties and this Committee should lean into talking more about the challenges ahead so we can dive directly into how we can assist with mitigating those challenges.



Supportive Housing Services Oversight Committee Meeting Summary

- **Comment:** This Committee should also keep a long-term view of the challenges ahead and not think only about the quarter or year ahead.
- **Comment:** If coordinated entry could help with forecasting the types of people coming into the system, then it could help with addressing challenges ahead. It would give us a better understanding of how SHS funding should be spent in the future.

Next Steps

Co-chair Susan Emmons thanked Ben Duncan for his work facilitating the Committee and the TCPB.

Yesenia announced that the annual report process will occur at meetings in the fall, which will provide another opportunity for members to engage with this work.

Adjourn

The meeting adjourned at 11:58 am.

TO: Metro Council
FROM: Mercedes Elizalde and Steve Rudman (Tri County Planning Body Co-Chairs)
DATE: September 13, 2024
SUBJECT: Tri-County Planning Body Recommendations and Feedback Regarding Changes to Oversight and Governance for the Support Housing Service Measure

At the August 14, 2024 regular meeting of the Tri-County Planning Body (TCPB), members received a briefing on Metro Chief Operating Officer Madrigal's recommendations to the Metro Council, for changes to the Supportive Housing Service measure. As one of the oversight bodies charged with identifying regional alignment, tri-county strategies and collaborations to address homelessness and housing stability, we would like to offer our feedback and recommendations for the new vision that is emerging.

Discussion

Following the presentation, TCPB members broke up into smaller groups to center the discussion around two key questions:

- 1) *How could the committee wrap up within timelines and produce something to hand off to staff and a potential new committee?*
- 2) *What recommendations does the committee want the COO and Council to keep in mind as they figure out details?*

There were several comments that shared concerns with a proposal that seems to suggest oversight should "start over." It is critical that leadership keep in mind, if the intention is to start a new oversight body with new members, it tends to take 1-2 years before that body will be able to perform as a cohesive unit. Any new group needs orientation and adjustment before relationships and roles are clear enough to see progress on shared goals. This creates a significant risk of disrupting progress underway and repeating work like consultant reports, focus groups and other outreach and research that bring duplicative financial liabilities.

There is a need to consolidate and summarize the work that TCPB has already done, to avoid duplication and re-starting implementation of new strategies already underway. We don't want to see gaps in progress or disruptions that take steps backwards for the sake of educating and orienting a new oversight body. Given that this work has been driven by multiple volunteer bodies to date, there may be too much work for just a single group to review and manage; even in our own meetings we see high volumes of content that require staff support to summarize and clarify.

The fact that we have a regional fund that requires partnership and collaboration to spend down is a good thing and should continue to be part of the structure going forward, perhaps even having stricter parameters. Having both a policy and financial incentive to work together and solve shared issues is a good thing and helps us all stay at the table.

Recommendations

- 1) Before starting a new oversight committee, ensure processes and milestones are documented to ensure the new body is able to build off what has already been done.
- 2) Consider the expertise you need at the table, including people with lived experience and providers of homeless and housing stability services.
- 3) Consider other funders who impact the scope of work like state and federal partners (i.e. Continuums of Care, housing authorities, state agencies that fund housing and homeless services, philanthropy that directly supports housing and homeless services).
- 4) The functions and responsibilities of the TCPB should not be eliminated. If these functions are to be folded into the new oversight body, consider a subcommittee structure if there is need for more expertise or more detailed engagement.
- 5) Ensure new governance structures maintain a system-level and regionalization priority in their work. There are very few places where jurisdictions are actively problem-solving about how to streamline across jurisdictional boundaries. Losing this would be deeply unfortunate for the people trying to understand and access housing support during the most difficult time in their lives.

Regional Implementation Fund (RIF) Utilization FY21-25 Coordinated Entry



This report is provided in response to a request during the TCPB meeting occurring on September 11th, 2024. The request was to have a clear statement of:

- RIF dollars spent in the TCPB regional goal area and what they were spent on
- RIF dollars committed to specific expenditures in the FY24-25 budget toward the TCPB regional goal area

Clackamas County	
Spent FY21-FY24	
no spending	\$ -
<i>Total</i>	\$ -
Committed- FY24-25	
Staffing for Case conferencing	\$165,604.00
<i>Total</i>	\$165,604.00

Multnomah County	
Spent FY21-FY24	
no spending	\$ -
<i>Total</i>	\$ -
Committed- FY24-25	
no specific commitment	\$ -
<i>Total</i>	\$ -

Washington County	
Spent FY21-FY24	
Community Connect	\$429,192.00
Coordinated Entry Personnel	\$ 22,180.00
<i>Total</i>	\$451,372.00
Committed- FY24-25	
Community Connect	\$447,928.00
<i>Total</i>	\$447,928.00

The following materials were received
during the meeting.

16:02:34 From Metro Housing Department to Everyone:
Reminder to keep chat set to Everyone. Thank you!

16:06:06 From Patricia Rojas (she/her/hers) to Hosts and panelists:
Forgot to say I'm the Housing Director for Metro.

16:17:32 From Metro Housing Department to Everyone:
Please remember to keep chat set to Everyone

16:17:42 From Metro Housing Department to Everyone:
From Patricia Rojas (she/her/hers) to all panelists 04:06 PM
Forgot to say I'm the Housing Director for Metro

16:21:28 From Cristina Castaño to Everyone:
Information about the 2 new funding opportunities for Multnomah Co providers: <https://johs.us/funding-opportunities/>

16:23:18 From Cristina Castaño to Everyone:
Michael, can you please promote Lori Kelly, Erin Pidot and Alyssa Plesser as panelists? They will help answer any questions from the committee. Thanks!

16:24:33 From Metro Housing Department to Everyone:
Thank you, Cristina. I will invite them to join as panelists

16:32:46 From Monta Knudson to Everyone:
Great success story!

16:34:42 From Cameran Murrphy (they them) to Everyone:
Can I get the name of the new tool, acronym is MIST?

16:35:17 From Katie Dineen, she/her, JOHS to Everyone:
Multnomah Services and Screening Tool (MSST)

16:40:36 From Cristina, she/her, Housing Oregon to Everyone:
Thanks for having a live phone sytem, do you use a languague bank to serve those that do not speak English? 2nd Question: Do you have data to share about how many BIPOC have been help to get them out of homelessness?

17:09:40 From Kathryn Harrington to Everyone:
I went back to the doc and did correct my understanding (to one of my questions about dates.) THanks for your patience.

17:10:49 From Monta Knudson to Everyone:
If the racial equity straggly is happening concurrently with the the other strategies, then how is the work from that strategy informing the other work?

18:06:59 From Christine Lewis to Everyone:
I'd like to hear about the contingency fund in context of e challenges not just the regional fund. for next conversation

18:13:24 From Kathryn Harrington to Everyone:
Please understand this is all FY24-25 work (FY25) not waiting for FY25-26 (FY26)