



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

Meeting: Supportive Housing Services Tri-County Planning Body Meeting  
Date: November 13<sup>th</sup>, 2024  
Time: 4:00pm-6:00pm  
Place: Zoom Webinar  
Purpose: The Tri-County Planning Body (TCPB) will receive an update on the Technical Assistance and Training Goals.

## 4:00pm **Welcome and Introductions**

- Decision: meeting summary approval

## 4:15pm **Public Comment**

## 4:25pm **Conflict of Interest**

## 4:30pm **Staff Updates**

## 4:40pm **Technical Assistance Goal Update**

- Presentation
- Questions & Answers

## 5:20pm **Training Goal Update**

- Presentation
- Questions & Answers

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

- Next meeting: December 11<sup>th</sup>, 2024

## 6:00pm **Adjourn**

# Table of contents

Agenda

Meeting summary from the Committee's last meeting on October 9<sup>th</sup>

Presentation Slides

Professionalizing Housing Service Work: Pathways and Opportunities in the Portland Metro Region - First Draft

Goal progress report November 2024

Tri-County Planning Body Goal and Recommendation Language

Supportive Housing Services Oversight Committee meeting minutes – September 23<sup>rd</sup>, 2024

TCPB-Approved Coordinated Entry Regional Implementation Plan (CERIP)

Zoom Chat

# Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights) or call 503-797-1536. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at [www.trimet.org](http://www.trimet.org).

## Thông báo về sự Metro không kỳ thị của

Metro tôn trọng dân quyền. Muốn biết thêm thông tin về chương trình dân quyền của Metro, hoặc muốn lấy đơn khiếu nại về sự kỳ thị, xin xem trong [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Nếu quý vị cần thông dịch viên ra dấu bằng tay, trợ giúp về tiếp xúc hay ngôn ngữ, xin gọi số 503-797-1700 (từ 8 giờ sáng đến 5 giờ chiều vào những ngày thường) trước buổi họp 5 ngày làm việc.

## Повідомлення Metro про заборону дискримінації

Metro з повагою ставиться до громадянських прав. Для отримання інформації про програму Metro із захисту громадянських прав або форми скарги про дискримінацію відвідайте сайт [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). або Якщо вам потрібен перекладач на зборах, для задоволення вашого запиту зателефонуйте за номером 503-797-1700 з 8.00 до 17.00 у робочі дні за п'ять робочих днів до зборів.

## Metro 的不歧视公告

尊重民權。欲瞭解Metro民權計畫的詳情，或獲取歧視投訴表，請瀏覽網站 [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)。如果您需要口譯方可參加公共會議，請在會議召開前5個營業日撥打503-797-1700（工作日上午8點至下午5點），以便我們滿足您的要求。

## Ogeysiiska takooris la'aanta ee Metro

Metro waxay ixtiraamtaa xuquuqda madaniga. Si aad u heshid macluumaad ku saabsan barnaamijka xuquuqda madaniga ee Metro, ama aad u heshid warqadda ka cabashada takoorista, booqo [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Haddii aad u baahan tahay turjubaan si aad uga qaybqaadatid kullanka dadweynaha, wac 503-797-1700 (8 galka hore illaa 5 galka dambe maalmaha shaqada) shan maalmaha shaqo ka hor kullanka si loo tixgaliyo codsashadaada.

## Metro의 차별 금지 관련 통지서

Metro의 시민권 프로그램에 대한 정보 또는 차별 항의서 양식을 얻으려면, 또는 차별에 대한 불만을 신고 할 수 [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). 당신의 언어 지원이 필요한 경우, 회의에 앞서 5 영업일 (오후 5시 주중에 오전 8시) 503-797-1700를 호출합니다.

## Metro의差別禁止通知

Metroでは公民権を尊重しています。Metroの公民権プログラムに関する情報について、または差別苦情フォームを入手するには、[www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)。までお電話ください。公開会議で言語通訳を必要とされる方は、Metroがご要請に対応できるよう、公開会議の5営業日前までに503-797-1700（平日午前8時～午後5時）までお電話ください。

## សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានកម្មប្រតិបត្តិការរើសអើងសម្រាប់ទស្សនាគោលដៅ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

## إشعار بعدم التمييز من Metro

تحتزم Metro الحقوق المدنية. للمزيد من المعلومات حول برنامج Metro للحقوق المدنية أو لإيداع شكوى ضد التمييز، يُرجى زيارة الموقع الإلكتروني [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). إن كنت بحاجة إلى مساعدة في اللغة، يجب عليك الاتصال مقدماً برقم الهاتف 503-797-1700 (من الساعة 8 صباحاً حتى الساعة 5 مساءً، أيام الاثنين إلى الجمعة) قبل خمسة (5) أيام عمل من موعد الاجتماع.

## Paunawa ng Metro sa kawalan ng diskriminasyon

Iginagalang ng Metro ang mga karapatang sibil. Para sa impormasyon tungkol sa programa ng Metro sa mga karapatang sibil, o upang makakuha ng porma ng reklamo sa diskriminasyon, bisitahin ang [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Kung kailangan ninyo ng interpreter ng wika sa isang pampublikong pulong, tumawag sa 503-797-1700 (8 a.m. hanggang 5 p.m. Lunes hanggang Biyernes) lima araw ng trabaho bago ang pulong upang mapagbigyan ang inyong kahilingan.

## Notificación de no discriminación de Metro

Metro respeta los derechos civiles. Para obtener información sobre el programa de derechos civiles de Metro o para obtener un formulario de reclamo por discriminación, ingrese a [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Si necesita asistencia con el idioma, llame al 503-797-1700 (de 8:00 a. m. a 5:00 p. m. los días de semana) 5 días laborales antes de la asamblea.

## Уведомление о недопущении дискриминации от Metro

Metro уважает гражданские права. Узнать о программе Metro по соблюдению гражданских прав и получить форму жалобы о дискриминации можно на веб-сайте [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Если вам нужен переводчик на общественном собрании, оставьте свой запрос, позвонив по номеру 503-797-1700 в рабочие дни с 8:00 до 17:00 и за пять рабочих дней до даты собрания.

## Avizul Metro privind nediscriminarea

Metro respectă drepturile civile. Pentru informații cu privire la programul Metro pentru drepturi civile sau pentru a obține un formular de reclamație împotriva discriminării, vizitați [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Dacă aveți nevoie de un interpret de limbă la o ședință publică, sunați la 503-797-1700 (între orele 8 și 5, în timpul zilelor lucrătoare) cu cinci zile lucrătoare înainte de ședință, pentru a putea să vă răspunde în mod favorabil la cerere.

## Metro txog kev ntxub ntxaug daim ntawv ceeb toom

Metro tributes cai. Rau cov lus qhia txog Metro txog cai kev pab, los yog kom sau ib daim ntawv tsis txaus siab, mus saib [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1700 (8 teev sawv ntxov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lwm ua ntej ntawm lub rooj sib tham.



## Tri-County Planning Body Meeting Summary

Meeting: Supportive Housing Services Tri-County Planning Body Meeting  
Date: Wednesday, October 9, 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 presentation and make a decision on Coordinated Entry Regional Implementation Plan

---

### Member attendees

Eboni Brown (she/her), Zoi Coppiano (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), Monta Knudson (he/him)

### Absent members

Co-chair Mercedes Elizalde (she/her), Yvette Marie Hernandez (she/her), Mindy Stadtlander (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 delegates

Clackamas County Chair Tootie Smith (she/her)

### County staff representatives

Clackamas County – Melissa Baker (she/her), Lauren Decker (she/her), Multnomah County – Christina Castaño (she/her), Katie Dineen (she/her), Washington County – Nicole Stingh (she/her), Kisa Quanbeck (she/her)

### Metro

Abby Ahern (she/her), Giovanni Bautista (he/him), Liam Frost (he/him), Michael Garcia (he/him), Yvette Chavez (she/her), Lo Miranda (they/them), Patricia Rojas (she/her)

### Kearns & West Facilitators

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

*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

Ben Duncan, Kearns & West (K&W), introduced himself and welcomed the Tri-County Planning Body (TCPB) to the meeting. He facilitated introductions and reviewed the meeting agenda and objectives.

Co-chair Steve Rudman provided opening remarks.

The TCPB approved the September Meeting Summary. Washington County Chair Kathryn Harrington abstained.

### Public Comment

No public comments were made.

### Conflict of Interest

Cristina Palacios declared a conflict of interest as Housing Oregon is on Metro's contractor list and could potentially receive SHS funding in the future.

Cameran Murphy declared a conflict of interest as Boys and Girls Aid receives SHS funding.

Zoi Coppiano declared a conflict of interest as Community Action receives SHS funding.

Eboni Brown declared a conflict of interest as Greater Good Northwest receives SHS funding. She noted her position is not funded by SHS.

Yoni Kahn declared a conflict of interest as the Northwest Pilot Project receives SHS funding. He noted that he serves on the TCPB to share provider perspectives and does not represent his employer.

Sahaan McKelvey declared a conflict of interest as Self Enhancement Inc (SEI) receives SHS funds. He noted that his position is not funded by SHS.

### Staff Updates

Nicole Stingh, Washington County, provided an update on the programs Washington County has been building out and that 100% of the budget has been spent. She noted that revenue collections are lower than the forecast which means the County will look at programmatic reductions to avoid overspending.

Cristina Castaño, Multnomah County, shared that Multnomah County has launched two funding opportunities for survivors of domestic and sexual violence, and is piloting cross-sector case conferencing.

Yesenia Delgado, Metro, was not able to attend to provide an update from the Supportive Housing Services (SHS) Oversight Committee.

Ben proposed that Metro send an update over in writing to the TCPB.

### Coordinated Entry Regional Implementation Plan

Abby Ahern, Metro, introduced herself and reviewed the TCPB Goal and Recommendations for Coordinated Entry. She presented a background overview and context of what coordinated entry is and reviewed the Racial Equity Lens Tool (RELT) that was used to review the Coordinated Entry

## Tri-County Planning Body Meeting Summary

Regional Implementation Plan (CERIP). She invited county staff to speak about recent improvements to their coordinated entry systems.

Melissa Baker, Clackamas County, shared that Clackamas County has expanded its assessment capacity by 200% and is answering about 80% of calls received live. The County has also expanded its prevention and diversion programs by working with families and has diverted 32 individuals. She shared a story about a client who has been successfully housed through the program.

Katie Dineen, Multnomah County, shared that Multnomah County has redesigned its coordinated access assessment tool to address racial disparities, which will launch at the end of the month. The redesigning process was in coordination with community bodies over three years and is culturally responsive and trauma-informed.

Kisa Quanbeck, Washington County, shared that Washington County has updated its system known as Community Connect to support culturally specific providers. The updated assessment focuses on matching prioritization and they are looking at expanding the number of assessors.

Abby, Melissa, Katie, Kisa, and Lauren Decker took turns presenting the CERIP strategies. For each strategy, they reviewed the key deliverables, milestones, budget, metrics, and timeline. The four strategies are:

- 1) Regionalize visibility of participant data
- 2) Align assessment questions
- 3) Regionalize approaches to prioritization for racial equity
- 4) Regionalize an approach to case conferencing.

The overall budget for the four strategies is \$1,195,000, with an additional \$447,928 in proposed ongoing spending for Washington County's Community Connect, for a total budget of \$1,642,928. The overall timeline would begin in October 2024, with refinement of objectives and strategies and partner engagement throughout 2025, with piloting and implementation in January 2026.

TCPB members and elected delegates had the following questions:

- **Question, Cristina P.:** Is language access provided for the phone lines? Do you have information on how many Black, Indigenous, or People of Color (BIPOC) or non-English speakers have been helped per county?
  - **Clackamas County response, Lauren:** Clackamas County provides language access. There are three bilingual Spanish assessors and an on-call line for other languages. We are tracking that data and can share it.
  - **Response, Washington County Chair Harrington:** That data must be tracked for the Annual Report for the SHS Oversight Committee.
  - **Multnomah County response, Katie:** Language access needs can be met, and that data is tracked. 77% of individuals placed in housing were BIPOC.
  - **Washington County response, Kisa:** We have a community phone line and at least half of those who answer calls are bilingual Spanish speakers. We have assessors who speak other languages and a language access line. That data is tracked in the annual report.
- **Question, Eboni:** Will there be prioritization in working with the counties to support individuals moving to other neighborhoods or counties where they feel safe and comfortable in their homes? I have heard some Black and Brown people do not feel safe in certain counties.

## Tri-County Planning Body Meeting Summary

- **Washington County response, Nicole Stingh:** The three counties are working on transfers to support that and are working with culturally specific providers.
- **Multnomah County response, Katie:** That is a question included in the assessment, but there are funding limitations. Continuum of Care (CoC) projects do not support participants outside of the CoC area. RLRA can transfer across county lines.
- **Question, Washington County Chair Harrington:** Will this work begin in October 2024? All the milestones are in 2025, and completion ranges from 2026-2027. The coordinated entry graphic at the beginning of the presentation can be interpreted as individuals are being sorted into three separate counties, we lack graphics of where we are and where we are going and need to do a better job of storytelling and representing strategies and work.
  - **Metro response, Abby:** Yes, if approved the work would begin immediately.
  - **Clackamas County response, Lauren:** The graphic is not supposed to indicate three different counties, but that people are matched with the appropriate level of care.
- **Question, Cameran:** I am interested to hear more about what Multnomah County has done to realign the assessment questions and if it was done in coordination with a regional approach. I would like to hear more about Clackamas County's approach to case conferencing.
  - **Multnomah County response, Katie:** The County started the process before the SHS regional work, but did touch base and share analysis and learnings with the other counties. We want to be mindful of the engagement process and commitments to providers.
  - **Clackamas County response, Lauren:** We do case conferencing for four types of cases and pull a by-name list to identify barriers and problem-solve. We would like to get more provider participation, but it is successful in many ways.
- **Question, Yoni:** I want to be mindful of provider workflow. Strategies can impact workflow and could cause consequences and burdens. It is important to circle back on every assessment and set reasonable expectations for outcomes. Questions should balance between being broad and invasive. It is important to implement a true equity lens. I support an extended timeline as it is important to get the process right instead of just getting it done.
  - **Metro response, Abby:** Providers' experiences were kept in mind as the TCPB named this goal to regionally improve coordinated entry systems to serve providers. The RELT tool was created and implemented into each strategy.
- **Comment, Multnomah County Chair Jessica Vega Pederson:** The Joint Office of Homeless Services is nationally recognized for addressing disparities for racial equity and we are excited to make this regional. We also need to have flexibility for those who are not in the system yet and provide services. If we are putting a new shelter in and having a preference for certain neighborhoods, how is the system flexible? How are we recognizing the need for place-based access to services? This is a conversation I am interested in having in the future.
- **Question, Sahaan:** Who is the governing body for the Homeless Management Information System (HMIS)? Using the RIF to fund Community Connect does not fully align with designated regional items. What is the point of being regional while funding individual programs? If Community Connect is the best program it should be regionalized.



## Tri-County Planning Body Meeting Summary

- **Metro response, Abby:** The HMIS governing body is made up of the three counties and their staff members. One group makes decisions about what is happening on the ground, and the other looks at sustainable funding.
- **Washington County response, Nicole S.:** Community Connect is not doing our own program but doing the work that is essential to doing coordinated entry.
- **Question, Nicole Larson:** Is the funding for Community Connect to support the program's regionalization or funding for administering the program?
  - **Washington County response, Nicole S.:** It is the cost of administering the program.
- **Question, Monta Knudson:** Is racial equity integrated with each strategy?
  - **Washington County response, Kisa:** The work is intertwined naturally as we put together the updated assessment questions and prioritization tools for the Chief Financial Officer to review. Equity is integrated into the review of the assessment and prioritization tools.
  - **Clackamas County response, Lauren:** The RELT tool will be used after every single step.

Ben asked the TCPB to vote on the CERIP as a whole and shared that anyone may propose a motion to separate the proposal into standalone items to approve. He shared that he would call on each member to share their thoughts, and then the TCPB would move into a formal vote.

**Motion:** Sahaan and Cristina P. motioned to vote on the CERIP as a whole.

TCPB members and elected delegates had the following comments:

- **Comment, Co-chair Rudman:** This group should think outside of the box, what is stopping the creation of a regional CoC? Last meeting the Regional Investment Fund (RIF) was discussed, and the Co-chairs will be meeting with Metro and county staff to discuss the RIF further.

**Motion:** Co-chair Rudman proposed to remove Community Connection from the CERIP for the time being and will circle back to the TCPB once the Co-chairs and jurisdictions completed their RIF conversations.

Ben asked the TCPB to vote on separating Community Connection from the CERIP.

**Vote:** Washington County Chair Harrington abstained. The TCPB approved separating Community Connection from the CERIP and circling back once the Co-chairs and jurisdictions completed their RIF conversations.

Ben asked the TCPB to discuss and then vote on the remaining four strategies of the CERIP.

TCPB members and elected delegates had the following comments:

- **Comment, Sahaan:** Any participant in any county should be able to enter into any coordinate entry system and decide where they want to go. I am planning to vote yes but want to note the following. The prioritization of the plan seeks to increase provider input, but no providers gave input on the plan. Thank you for changing the assessment tools and building capacity with culturally specific providers. I have seen a significant average score difference between 2-1-1 assessors and culturally specific assessors. Please clarify what is meant by lived experience, sometimes it can mean current traumatic lived experience, and other times it can mean those who have lived through that experience and can now provide reflections and perspective. It is important to take the time to do this right and to



## Tri-County Planning Body Meeting Summary

do it quickly. I think case conferencing can increase efficiency, but do not think it should be used as a prioritization tool. That can increase subjectivity and create more back doors to the process.

- **Comment, Yoni:** I love the idea of regionalizing the visibility of participants to their data. I am curious about how this goal relates to others, specifically health and housing integration. I hear that there is rising acuity, perhaps there is potential for coordinated entry to link to a health plan, so individuals know where to go to address health needs.
  - **Metro response, Abby:** The healthcare housing integration plan is coming in January and connects to the CERIP with the assessment alignment questions.
- **Comment, Cameran:** Echo Sahaan's comments. I want a regional system that is accessible and seamless no matter what housing authority a participant connects with. I do not want any adverse impacts on providers or participants.
- **Comment, Zoi:** Excited to move this forward. I was an assessor of Community Connections and saw the evolution of trauma-informed questions.
- **Comment, Cristina P.:** Those with lived experiences should be compensated for their work. Being trauma-informed collects more data and is not a check-the-box exercise.
- **Comment, Nicole L.:** Excited to move this forward. Separating the Community Connection program is not about the validity of the program but appropriately allocating funding.
- **Comment, Washington County Chair Harrington:** The CERIP has been well researched and thought through.
- **Comment, Multnomah County Chair Vega Pederson:** I am supportive of this work. The TCPB needs to have a conversation in the future about regionalization and moving from one county to another as that is not how funding currently works.
- **Comment, Metro Councilor Christine Lewis:** The discussion is going in the right direction. We currently have three programs and regional strategies. I hope to get to the point where we see a regional program. I look forward to the conversations about what regionalization means.

Eboni and Monta had no comments.

**Vote:** The TCPB approved the CERIP with the removal of Community Connection.

Ben asked the TCPB to discuss and then vote on Community Connection.

TCPB members and elected delegates had the following comments:

- **Question, Multnomah County Chair Vega Pederson:** Will there be impacts for Washington County if this is not funded today?
  - **Washington County response, Nicole S.:** It is difficult to understand impacts today, the current fiscal year (through June 2025) is funded. I would like to circle back to this conversation. This could increase the funding deficit that is currently forecasted.
- **Question, Monta:** How much time do we have without causing impacts to Washington County?
  - **Washington County response, Nicole S.:** Before the budget begins July 1, 2025.
- **Comment, Co-chair Rudman:** This is indicative of a larger shift of RIF fund use, not just a tension point with this program. I suggest that the Co-chairs meet with staff and circle back. RIF funds are for regional strategies and efforts, the other 95% of tax funds can go towards these elements.
- **Question, Cameran:** I am not feeling prepared to vote on Community Connections. Can we vote next month?

## Tri-County Planning Body Meeting Summary

- **Metro response, Liam Frost:** This proposed investment is not the only one regarding the shift of RIF fund use. Metro will meet with county staff and Co-chairs to get ahead of that July 1, 2025 deadline and limit disruptions.
- **Comment, Washington County Chair Harrington:** I am not going to vote on this action. I am also confused by the previous meeting summary. I would like to see clear documentation of what happens with funding for all goal areas.
  - **Facilitator response, Ben:** Metro can follow up on a summary of funds being spent versus utilization.
- **Question, Eboni:** How much is the deficit and how much of Community Connection is for regionalization?
  - **Response, Washington County Chair Harrington:** There was a \$21 million shortfall in collections.
  - **Washington County response, Nicole S.:** The funding is to run our coordinated entry system.
- **Comment, Nicole L.:** This emphasizes the value in clarifying language on what RIF funding is specifically spent on regionalization versus county programming. I do not want to see negative impacts from this. Is the RIF supposed to be spent to meet the goals even if it is not regional? Does it need to be regional and meet the goal? I don't know how to vote on that.
  - **Metro response, Abby:** That is for the TCPB to decide.
- **Comment, Zoi:** If the TCPB's goal is to regionalize coordinated entry, wouldn't this program move into that regional system?
- **Comment, Co-chair Rudman:** This is a good case of a larger point. Counties have budgeted items before with the RIF, but we have decided that the 2025-2026 fiscal year has a new process. We do not want to harm counties but be in the process together.
- **Comment, Cristina P.:** I am hesitant to make a decision, I believe in this work, but I do not want to give one amount of funds to one county and leave the others with less.

**Vote:** Zoi voted to approve. Washington County Chair Harrington, Multnomah County Chair Vega Pederson, Cameron, Nicole L., Yoni, and Eboni abstained. Ben stated that the vote failed.

### Closing and Next Steps

Ben shared that the next steps are:

Next steps

- Metro staff to send an SHS Oversight Committee update over in writing.
- Co-chairs, Metro staff, and staff from the three counties to meet and discuss the next steps for RIF funding non-goal related items, including Community Connections.
- Metro to follow up with Washington County Chair Harrington on a summary of RIF funds being spent versus utilization.

### Adjourn

Adjourned at 6:15 p.m.

# Capacity building, technical assistance and training

Tri-County Planning Body

November 13, 2024



# TCPB technical assistance goal

**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.

# TCPB training goal

**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.

# The work of the counties

- SHS rolled out mid-pandemic
- Building new systems/scaling up existing systems
- Innovating and responding to pressing and immediate provider needs

| Technical Assistance that the counties offer | Clackamas County   | Multnomah County  | Washington County  |
|--|--|---|--|
|  | <ul style="list-style-type: none"> <li>• Five TA providers on retainer contract available to providers (four funded through SHS, one focused on rural providers, not SHS funded)</li> <li>• Each SHS funded TA contract: 4 years, up to \$1 million total value</li> </ul> | <ul style="list-style-type: none"> <li>• Increased number of contract managers post SHS</li> <li>• Designated funding to support provider TA/capacity building</li> <li>• Designated TA for procurement</li> <li>• Office hours for NOFAs</li> <li>• System development grants</li> </ul> | <ul style="list-style-type: none"> <li>• Last FY, Provided 22 TA grants totaling over \$452,000</li> <li>• Provided 17 grants for organizational capacity building totaling over \$2.4 million</li> <li>• These grants were non-competitive for contracted providers, and additional funds may be allocated</li> </ul> |



|                                   | Clackamas County  | Multnomah County   | Washington County   |
|-----------------------------------|---|--|---|
| Trainings that the counties offer | <ul style="list-style-type: none"> <li>• Housing First Response training is required for all providers (includes motivational interviewing, working with folks in crisis, homelessness diversion and more)</li> </ul> | <ul style="list-style-type: none"> <li>• Dedicated FTE for training</li> <li>• Assertive engagement trainers</li> <li>• Training coordinator</li> <li>• Domestic &amp; sexual violence program specialist (TA &amp; training focused)</li> <li>• Proactive, enhanced training opportunities</li> </ul> | <ul style="list-style-type: none"> <li>• On-demand trainings through Power DMS</li> <li>• Provider training aimed at increasing culturally responsive service provision</li> <li>• Learning series available to contracted providers</li> <li>• Housing and Supportive Services Network monthly meetings for all</li> </ul> |

# Metro Housing Dept: Regional Capacity Team

- Support a regional system of care through capacity building, training and technical assistance
- Ensure consistent quality level of care regardless of where a person accesses services in the region
- Ensure providers have the tools they need

# RFQu 4269: new TA consultants

|  |   |   |   |  |
|--|---|---|---|--|
| <b>Human Resources:</b><br>11 qualified vendors                  | <b>Program Design:</b><br>29 qualified vendors                            | <b>Data Management:</b><br>26 qualified vendors                               | <b>Information Technology:</b><br>7 qualified vendors | <b>Housing and Homeless Services Best Practices:</b><br>29 qualified vendors |
| <b>Racial Equity and Social Justice:</b><br>26 qualified vendors | <b>Organization and Board Development:</b><br>26 qualified vendors        | <b>Contract Consultation &amp; Fiscal Management:</b><br>19 qualified vendors | <b>Technical Writing:</b><br>16 qualified vendors     | <b>Communications:</b><br>15 qualified vendors                               |
| <b>Community Engagement:</b><br>37 qualified vendors             | <b>Housing Development &amp; Asset Management:</b><br>8 qualified vendors | <b>Unit Inspectors:</b><br>3 qualified vendors                                | <b>Volunteer Management:</b><br>10 qualified vendors  | <b>Compliance Services:</b><br>7 qualified vendors                           |

**Total qualified agencies: 67**

**PSH Technical Assistance  
Demonstration & Research Project**

# What is technical assistance?

*Tailored, individualized support to implement policy or streamline an organization's operations*



# Metro's permanent supportive housing work

**Goal:** Develop a regional framework for PSH that includes programmatic policies, regionally consistent definitions and standards of practice.

**Intended outcomes:**

- Ensure PSH meets the needs of the person receiving it—help them get housed, stay housed with customized care and tailored services
- Develop personalized housing interventions that meet the needs of clients regardless of their acuity or challenges they may experience
- Help increase the rate at which people stay housed

# Project guiding values and goals

## Advance Racial Equity

Develop best practices to provide consistent, quality PSH services to clients of color

## Add Value to the System

Support Metro's PSH work of helping the region reduce chronic homelessness

Measure the impact of technical assistance investments

## Avoid duplicating TA counties are already providing

Build a regional technical assistance program

## Support PSH implementation system-wide

Help align local service delivery with national best practices

Identify common practices in our region's PSH delivery and establish a baseline for delivery



# Developing a scope of work

- Identify 1-4 technical assistance experts from our request for qualifications knowledgeable of PSH service delivery best practices
- Pair consultants and PSH providers
- Scope of work:



# Provider benefits

A customized  
assessment

Tailored technical  
assistance  
services

Customized  
trainings

Build your  
network

Help shape the  
future of PSH in  
our region

Funding for staff  
time (contract  
model)

# Provider commitment

## **Agency time and participation commitment (over a 6-month project)**

- Monthly cohort with other PSH providers and consultants
- Initial organization assessment (time responding to assessment questionnaires/interviews)
- Engage weekly with the project to implement technical assistance strategies

## **Reports**

- Project update reports with Technical Assistance consultants
- Project financial summary reports

# Metro's role: project leadership

Contract  
management

Host monthly  
cohort

Partner in  
provider/consultant  
relationship

Coordinate research

Act on learnings

# Questions?



**Training goal update:  
Housing Service  
Worker Certification and Research  
Project**

# Guiding values for project

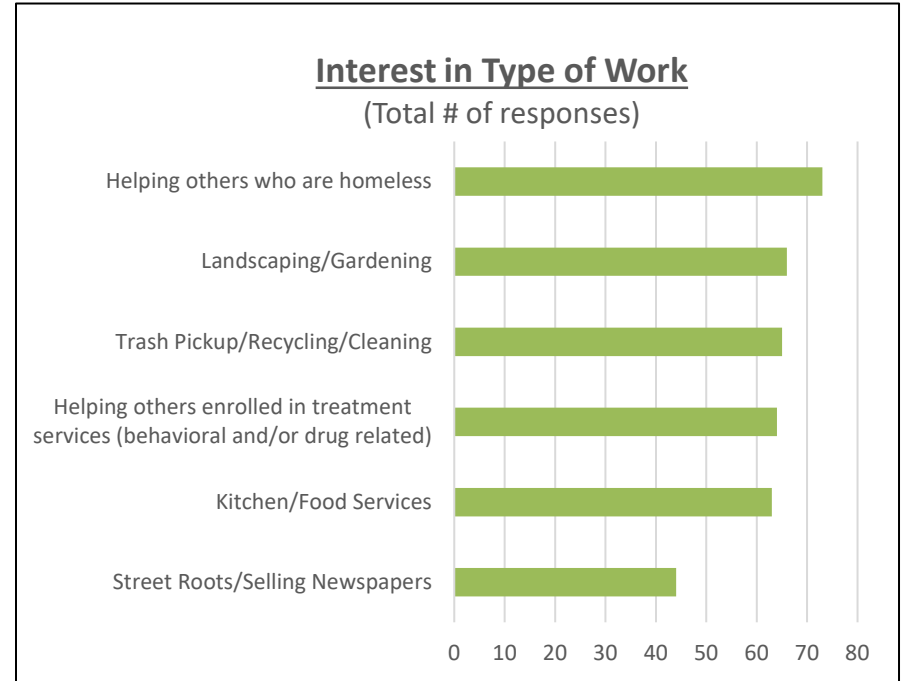
- Ensure people experiencing homelessness can expect a high quality of care
- Research and identify cost-effective pathways for providers to have access to a well-trained workforce
- Develop a core training curriculum to meet the needs of providers
- Identify training access points throughout the region



# The need and opportunity

*"In the past year, we've onboarded eleven new staff and every time it's been challenging to find the trainings they need. And then when we do find them, we have to wait months to get them enrolled."*

- Local Service Provider



Results from an anonymous survey of shelter guests administered by the City of Portland.

# Defining “service worker”

- Case managers
- Shelter workers
- Street outreach workers
- Housing retention workers
- Coordinated entry staff
- Drop-in center workers
- And more

# Research question

What training resources currently exist in our region that encompass the fundamental skills that housing and homeless service workers need to be prepared for the work early in their careers?

What new resources might need to be created to better support their training?

# Content

- Survey findings
- Local research: college programs
- Local research: community and behavioral health certifications
- National models
- Potential pathways
- Research next steps

# Survey findings

Substance use  
recovery and  
mental health

Basics of  
housing case  
management

Basics of  
housing systems  
navigation

Diversity, equity,  
and inclusion

Trauma  
informed care  
and self-care

# Potential Courses

| Substance use recovery and mental health   | Basics of housing case management  | Basics of housing system navigation   | Diversity equity and inclusion   | Trauma-informed care and self-care   |
|--|--|---|--|--|
| <ul style="list-style-type: none"> <li>• Boundary Setting</li> <li>• Crisis Intervention</li> <li>• Conflict Resolution</li> <li>• Bystander Intervention</li> <li>• Emergency Response               <ul style="list-style-type: none"> <li>○ Naloxone</li> <li>○ First Aid</li> <li>○ CPR</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• Benefits Navigation</li> <li>• Fundamentals of Case Management</li> <li>• Data Systems (HMIS and Community Services)</li> <li>• Financial Wellness Education</li> </ul> | <ul style="list-style-type: none"> <li>• Housing Systems               <ul style="list-style-type: none"> <li>○ Vouchers</li> <li>○ Rapid Rehousing</li> <li>○ Eviction Prevention</li> </ul> </li> <li>• Coordinated Entry</li> <li>• The Principles of Housing First</li> </ul> | <ul style="list-style-type: none"> <li>• Cultural Humility</li> <li>• Implicit Bias</li> <li>• Power Dynamics</li> <li>• Harm Reduction</li> <li>• Honoring Lived Experience</li> <li>• History of racial exclusion in Portland</li> </ul> | <ul style="list-style-type: none"> <li>• Coping Strategies</li> <li>• Foundations of Trauma Informed Care and Trauma Intervention Programs</li> <li>• Employee Resilience and Self Care</li> </ul> |

**How do the region's existing training or post-secondary education programs potentially align with the categories outlined in the draft course descriptions?**

# Local research

- College programs
  - Certificates
  - Degree programs
  - Non-credit options
- Community and behavioral health certifications



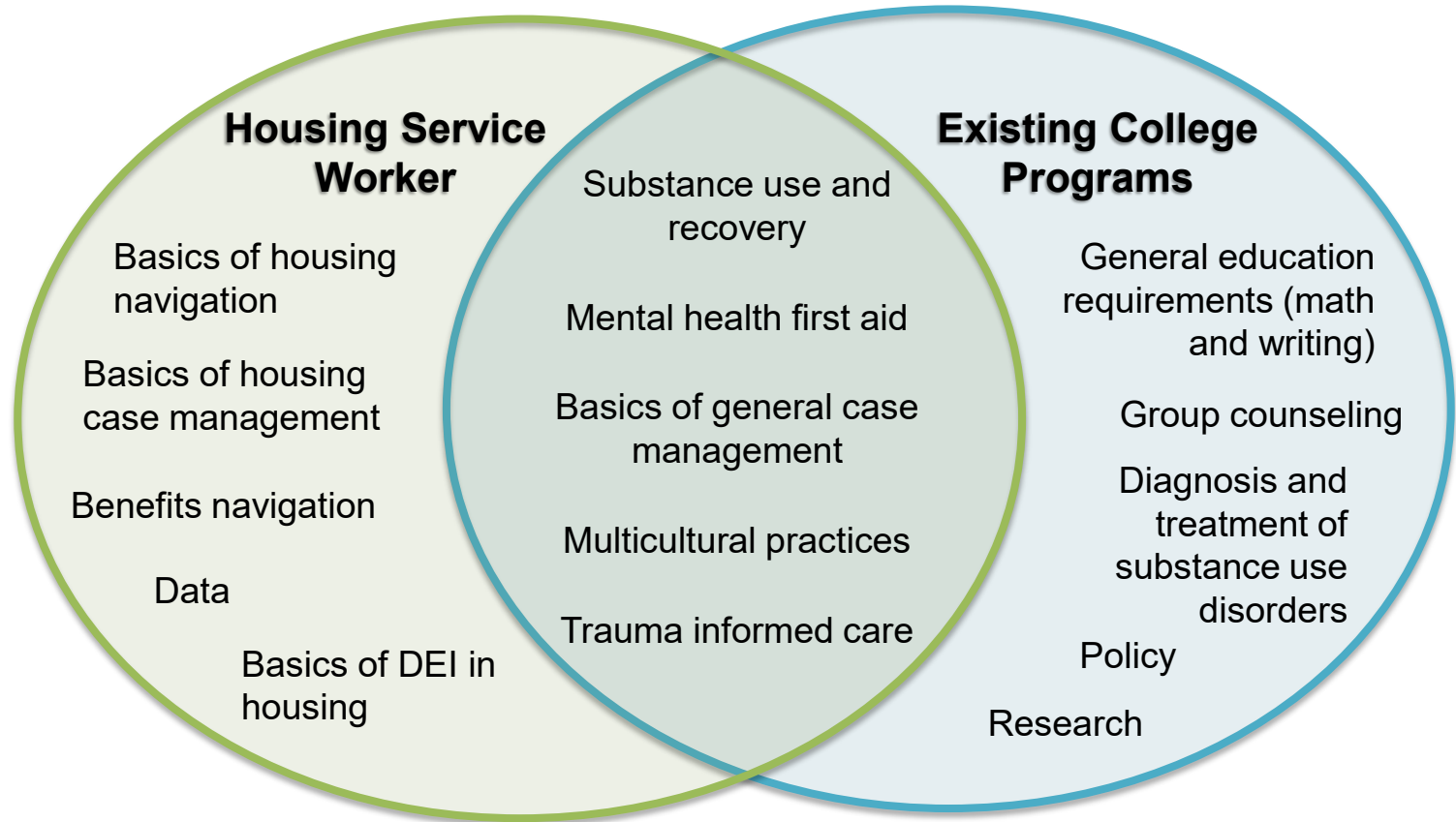
# College programs

|                              | Clackamas<br>Community College  | Mt. Hood<br>Community College   | Portland<br>Community College                                  | George Fox, Pacific, Portland<br>State, University of<br>Portland, and Warner Pacific |
|------------------------------|---|---|--|---|
| <b>Certificate</b>           | Alcohol and Drug Counselor<br>Career Pathway Certificate<br>of Completion | Behavioral Health Care<br>Specialist Certificate  | Foundations in Human<br>Services Career Pathway<br>Certificate |   |
|                              | Human Services Generalist<br>Certificate of Completion                    | Youth Worker Certificate  |  |   |
| <b>Associate<br/>degree</b>  | Human Services Generalist<br>Associate of Applied<br>Science              | Mental Health Social<br>Service and Addiction<br>Counseling Associate of<br>Applied Science | Family and Human Services<br>Associate Degree                  |   |
| <b>Bachelor's<br/>degree</b> |   |   |  | Bachelor of Social Work   |

# Non-credit options

- Non-credit Training Certifications (NCTCs)
- PSU's Center for Executive and Professional Education (CEPE)
- Continuing Education Units (CEUs)
- Academic Continuing Education Courses (ACEs)

# Existing course overview



# Healthcare certifications

## OHA Traditional Health Worker (THW)

- Community Health Worker
- Peer Support Specialist
- Peer Wellness Specialist
- Personal Health Navigator

## Mental Health and Addictions Certification Board of Oregon (MHACBO)

- Qualified Mental Health Associate
- Qualified Mental Health Professional
- Certified Drug and Alcohol Counselor
- Certified Gambling Addiction Counselor
- Certified Prevention Specialist
- Certified Recovery Mentor

# National models

## College programs

|                   |  |
|-------------------|--|
| CERTIFICATES      | <ul style="list-style-type: none"><li>• <b>Program for Engaged Educational Resources (PEER)</b> San Diego City College</li><li>• <b>Homeless Service Work Certificate</b> Santa Monica College</li><li>• <b>Care Navigation and Coordination Certificate</b> Seattle Central College</li></ul> |
| ASSOCIATE DEGREES | <ul style="list-style-type: none"><li>• <b>Social &amp; Human Services Associate of Applied Sciences Transfer Degree</b> Seattle Central College</li><li>• <b>Associate of Arts in Behavioral Sciences: Social Work</b> San Diego City College</li></ul>                                       |

## Advocacy training courses

- **Speak Up!** Corporation for Supportive Housing
- **Lived Experience Training Academy (LETA)** National Coalition for the Homeless
- **Residents Organizing for Change (ROC)** Neighborhood Partnerships Oregon
- **Street Roots Ambassador Program** Street Roots Portland

## Virtual training courses

- **The Alliance Center for Capacity Building (the Center)** National Alliance to End Homelessness
- **Homeless and Housing Resource Center (HHRC)** Substance Abuse and Mental Health Services Administration (SAMHSA)
- **Supportive Housing Training Center** Corporation for Supportive Housing (CSH)
- **C4 Innovations**

# National trend takeaways

Work with impacted parties to figure out what's needed.

Include course offerings on:

Mental Health First Aid · Housing First · Harm reduction · Equity and inclusion · Data · History and policy in context · Case management · Trauma informed care · Introduction to human development

Incorporate experiential learning in shelters and outreach spaces.

Address barriers to training: language, childcare, instructional methods, systemic racism.

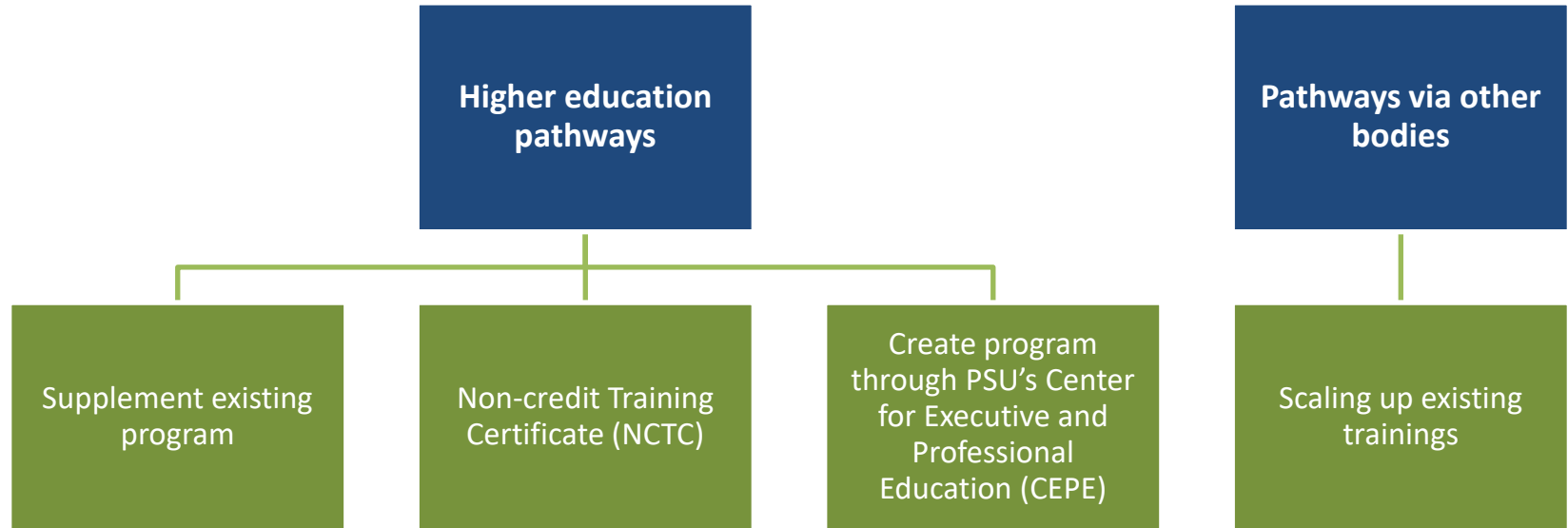
Incorporate peer mentorship after "graduation."

Offer support services to learners during and after the session.

Offer career planning support.

Offer opportunities for continuing education.

# Potential pathways (so far...)



# Areas for further research

Workforce  
boards

Apprenticeship  
programs

Housing specific  
peer-support  
training



# Feedback we've heard (so far...)

- Connect created program, training and/or certification with wage increases.
- Create a training for supervisors including content on topics like culturally responsive supervision.
- Identify solutions that can be implemented immediately, like on demand trainings.

**An Immediate Opportunity**

# On-Demand Training Program Pilot

**Goal:** Meet provider training needs today by offering free access to NAEH, CSH on-demand trainings

## **How to participate**

- Two staff per agency (frontline worker and a supervisor), up to 10 agencies
- Each takes seven on-demand trainings at their convenience over a two-month period
- Complete a survey for each training
- Help Metro understand the efficacy of the on-demand training
- Email [MetroHousingRegionalCapacity@oregonmetro.gov](mailto:MetroHousingRegionalCapacity@oregonmetro.gov) to participate!

# Outreach

- Coalitions:
  - Housing Oregon (11/13)
  - HereTogether (11/20)
- Clackamas County SHS Managers and Supervisors Meeting (11/4)
- Washington County:
  - PSH Providers (10/23)
  - HSSN Meeting (11/6)

# Questions?



[oregonmetro.gov](http://oregonmetro.gov)





PROFESSIONALIZING HOUSING SERVICE WORK:  
PATHWAYS AND OPPORTUNITIES IN THE PORTLAND METRO  
REGION

PREPARED BY METRO HOUSING DEPARTMENT'S REGIONAL CAPACITY  
TEAM

DRAFT 1, SEPTEMBER 2024

Post-Secondary Education Analysis

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

**So, hello. We’re Metro – nice to meet you.**

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

**Stay in touch with news, stories and things to do.**

[oregonmetro.gov/news](http://oregonmetro.gov/news)

**Follow oregonmetro**



**Metro Council President**

Lynn Peterson

**Metro Councilors**

Ashton Simpson, District 1

Christine Lewis, District 2

Gerritt Rosenthal, District 3

Juan Carlos González, District 4

Mary Nolan, District 5

Duncan Hwang, District 6

**Auditor**

Brian Evans

600 NE Grand Ave.

Portland, OR 97232-2736

503-797-1700



## TABLE OF CONTENTS

|      |  |    |
|------|--|----|
| I.   | INTRODUCTION .....                     | 1  |
| II.  | SURVEY FINDINGS .....                  | 2  |
| III. | LOCAL RESEARCH: INTRODUCTION .....     | 7  |
| IV.  | NATIONAL MODELS AND OTHER TRENDS ..... | 23 |
| V.   | POTENTIAL PATHWAYS TO PURSUE .....     | 31 |
|      | APPENDIX.....                          | 37 |
|      | DEFINITIONS .....                      | 43 |
|      | REFERENCE.....                         | 47 |

DRAFT



## I. INTRODUCTION

Housing service workers<sup>1</sup> form the backbone of the Portland Metro region's response to homelessness. From street outreach workers to housing navigators, to case managers, to drop-in center staff, shelter operators and more, housing service workers are the key partners in helping individuals transition from the streets to safe, stable housing. Working with people who have experienced homelessness is complex and often traumatic, the result of supporting people who have themselves experienced complex traumas. Doing this work successfully requires specialized skills and training, which often falls on the agency that incoming workers are hired by, rather than a centralized, education-oriented institution. This often means that agencies that are already experiencing extreme challenges in supporting their clients are having to dedicate additional staff time toward training incoming service workers.

Voter passage and implementation of the Metro Supportive Housing Services measure, the largest homeless services investment per capita in the country, has uncovered additional layers to our region's social service workforce challenges and demonstrated a need to identify new pathways for training incoming workers so they have the tools and skills they need to support clients with a shared expectation of care on their first day of work. Metro, along with Clackamas, Multnomah and Washington Counties—in conjunction with the Metro Supportive Housing Services Tri-County Planning Body, and our region's service providers—have identified training for frontline staff as a fundamental focus area to scaling up our region's homeless response.

In recognizing a need for baseline trainings, we look toward our partners in the behavioral health community, who have developed a series of certifications—like the peer support specialist—to ensure that providers have the tools and skills they need to serve clients, and that clients are receiving a shared standard of care no matter what provider they are receiving services from.

At its most fundamental level, this research project started as an attempt to prove the following hypothesis: Unlike the behavioral health community, which has certifications like the Peer Support Specialist to train providers in the skills they need to provide services for people experiencing mental health illnesses and addiction, the housing and homeless services industry does not have a similar ground-floor training program to help incoming service workers develop the skills and tools they need to serve people experiencing homelessness on day one.

---

<sup>1</sup> For the purposes of this paper and broader research project “housing service worker” is intended to serve as a wide-ranging term that includes anyone who is employed by a nonprofit agency in the frontline work of delivering housing and homeless services. This may include, but is not limited to: case managers, shelter workers, street outreach workers, housing retention workers, coordinated entry staff, drop-in center workers and more.

Our research demonstrates that this type of professional certification for homeless service workers does not exist locally. But it has pointed us in several directions we as a community might pursue through existing programming or new programming.

This paper outlines the first phase of our research, which primarily focused on higher education pathways. In a later iteration, we plan to research additional potential pathways in areas such as local workforce boards, apprenticeship models, train the trainer models, hosting a certification program at a nonprofit and more. We also recognize this research summary is only an initial step and that bringing these findings to homeless service providers and engaging in authentic dialogue and incorporating feedback will be critical to the success of the program in the immediate future and long term. At its core, the mission of this research—and any resulting policy recommendations that come from it—is to ensure a robust, accessible workforce pipeline of housing service workers who have the skills, the tools and the training to successfully support individuals experiencing homelessness or transitioning to housing early in their careers. Social service work can be incredibly empowering, fulfilling, even life giving. But making it so requires that the worker has the support they need. The mission of this project, then is to ensure that anyone who wants to do this work—whether they’ve themselves experienced homelessness or housing insecurity or are looking for a career change—enter the field readily, easily and with the appropriate training and support to succeed.

At this juncture, this research paper covers the following areas:

- A summary of the skills and trainings that Metro and the counties believe incoming service workers should have access to early in their roles
- A scan of certifications and degrees (Associate and Bachelor’s level) at the institutions of higher learning in the Portland metro area; since the primary goal of this research is to identify immediate or near-term, affordable pathways for frontline service workers to be successful early in their career, we did not review Master’s level programs, which require undergraduate education and additional years to complete
- A scan of national programs (including higher education programs, advocacy trainings and on demand trainings), which may serve as a potential model for this work
- A summary of the various meetings our team held with institutions of higher learning in addition to the research of potential programs
- Potential pathways our region might consider pursuing if we were to chart a higher education pathway for a potential program

## II. SURVEY FINDINGS: TRAININGS AND SKILLS DESIRED FROM JURISDICTIONAL FUNDERS

At the outset of this research project, Metro’s Regional Capacity Team recognized that we needed to develop a baseline understanding of the trainings and skillsets that jurisdictional funders (many of whom have former housing service workers on their teams) thought were necessary for newly hired frontline service workers to have access to.

In July 2024, Metro staff circulated a survey to key employees among the Supportive Housing Services (SHS) jurisdictional partners: Multnomah County's Joint Office of Homeless Services, Clackamas County's Health Housing and Human Services department, Washington County's Housing Department and Metro's own Housing Department. The survey asked just two questions:

- What skills do you think incoming housing services workers most need when they come into the job?
- As we consider developing a housing service worker certification, what trainings or learning opportunities do you think should be included?

Metro staff then consolidated the responses into high level focus areas, and from there, developed a series of theoretical course descriptions with coursework content (listed below) to highlight the outcomes jurisdictional funders believe are necessary for housing service workers to receive early in their careers.

It is important to note that these theoretical course descriptions are not finalized. They are meant to serve as a means of organizing desired learning outcomes, comparing to what is already available in the region's higher education and workforce training programs, and sharing the concept of this program with jurisdictional partners, service providers and potential hosts of a program. The theoretical course descriptions are subject to change based on feedback from any of the interested partners in this project, especially service providers.

## **THEORETICAL COURSE DESCRIPTIONS FOR A HOUSING SERVICE WORKER CURRICULUM**

### **SUBSTANCE USE, RECOVERY, AND MENTAL HEALTH**

The "Substance Use, Recovery, and Mental Health" subject area for front-line housing service workers would provide essential tools and strategies to effectively support individuals facing complex mental health/substance use disorder challenges. Participants would explore crucial topics such as crisis intervention and emergency response protocol, including planning and procedures for handling urgent situations. Additionally, the subject area would cover life skills development and building resiliency to empower both clients and service providers in navigating the recovery journey.

Content may include:

- Boundary Setting
- Bystander Intervention
- Crisis Intervention
- Conflict Resolution
- Emergency Action Planning and Procedures:

- Naloxone administration,
- First aid,
- CPR, etc.
- Fundamentals of Harm Reduction

## **BASICS OF HOUSING SERVICE WORKER CASE MANAGEMENT**

The "Housing Service Worker Case Management" subject area would equip front-line housing service workers with the skills necessary for effective case management. By exploring the history of housing issues in Oregon and current strategies to address inequities, participants would gain insights into effective case planning, motivational interviewing, and working with specific populations, enhancing their ability to offer comprehensive and empathetic and culturally appropriate support. This subject area would cover maintaining client confidentiality and ethical standards, as well as essential areas such as benefits navigation. This subject area would also address practical aspects of client care, including managing bed bugs and lice, and understanding hoarding behaviors

Content may include:

- Benefits Navigation:
  - Supplemental Nutrition Assistance Program (SNAP, AKA "Food stamps")
  - The Supplemental Income Program for Women, Infants, and Children (WIC)
  - Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI)
  - Oregon Health Plan (OHP)
  - Temporary Assistance for Needy Families (TANF)
- ID/Birth Certificate assistance
- Energy Assistance
- Financial Wellness/Education
- Data
  - Google Suites/Microsoft
  - HMIS
  - Community Services
- Causes of homelessness/poverty
- Fundamentals of Case Management including:
  - Assertive Engagement
  - Motivational Interviewing
  - Power Dynamics

- Progressive Assistance (Engaging with a participant with progressive intensity until the service worker meets their level of need.)
- Conflict Resolution/Crisis Intervention
- Ethics and Conflict of Interest
- Strength-based approach
- History of Housing in Oregon/Portland 101
- Particular focus placed on Oregon's history of systemic racism in housing

## **BASICS OF HOUSING SYSTEM NAVIGATION**

The "Basics of Housing System Navigation" subject area would be designed to empower frontline housing service workers with foundational knowledge and practical skills for navigating complex housing systems. Participants would gain insights into the intricacies of affordable housing, including the application of various types of housing vouchers and the principles of Housing First. This subject area would cover critical topics such as the causes of homelessness and poverty (generally), emergency response planning, and the application of trauma-informed approaches when addressing domestic violence and other crises. Additionally, attendees would learn about community resources, fair housing laws, and the history of housing issues in Oregon and Portland, which are crucial for effective housing navigation and client advocacy in the Portland-metro area. With a focus on housing solutions and rapid rehousing, participants would also become proficient in managing paperwork and understanding income eligibility for subsidized housing.

Content may include:

- Housing systems
- Housing vouchers
- Fair housing law
- Eviction Navigation/Prevention
- Rapid Rehousing
- Permanent Support Housing
- Causes of Homelessness/Poverty (generally)
- Coordinated Entry
- History of Housing in Oregon/Portland 201
- The Principles of Housing First
- Housing Navigation Practices

## **DIVERSITY, EQUITY, AND INCLUSION**

The "Diversity, Equity, and Inclusion" subject area would be designed for frontline housing service workers to deepen their understanding and application of inclusive practices in their daily work. Participants would explore the fundamentals of diversity, equity, and inclusion, including cultural humility and the importance of cultural responsiveness in supporting clients from various identity groups. This subject area addresses implicit bias, power dynamics, and the ethics of working with diverse populations, emphasizing respect for lived experiences.

Content may include:

- Fundamentals of Diversity, Equity and Inclusion, including:
  - Cultural Humility
  - Culturally Responsive
  - TIC Mandatory Reporting
- Working with people with intersectional identities
- Harm Reduction
- Honoring Lived Experience
- Implicit Bias
- Power Dynamics

## **TRAUMA INFORMED CARE AND SELF-CARE**

The "Trauma Informed Care and Self-Care" subject area would be crafted for front-line housing service workers to provide essential strategies for both client support and personal well-being. This subject area would focus on the foundations of Trauma Informed Care, teaching participants how to apply trauma-sensitive approaches when working with individuals experiencing homelessness, poverty, domestic violence, substance use disorder, and other significant challenges. Emphasis is placed on developing robust self-care practices to combat compassion fatigue and maintain resilience. This subject area would also cover practical aspects such as creating safer spaces, integrating harm reduction principles, and understanding power dynamics, equipping service workers with the skills to support both themselves and their clients effectively.

Content may include:

- Coping strategies
- Boundary Setting
- Compassion Fatigue



- Foundations of Trauma Informed Care and Trauma Intervention Programs
- Person Centered Thinking
- Safer Spaces and Planning
- Self-Care
- Resiliency

### III. LOCAL RESEARCH: INTRODUCTION

As outlined above, a fundamental goal of this research project was to identify whether any of our local institutions of higher education already have a training or certification program to provide the baseline skills housing service workers need early in their careers, or if they have elements that could collectively support that type of a program.

To accomplish this, we performed a landscape analysis of existing human services related education programs in the Portland Metro area. Through that analysis, we found two pathways to earning a certification as a human services professional: education programs and state certifications.

- Post-Secondary education programs contain coursework around human services and eventually lead to a degree or certificate.
- Certifications are offered by the state or state sanctioned, nonprofit accreditation boards. These are not training or education programs themselves, but they do require approved training and/or education programs can be offered by community colleges or community-based organizations.

In some cases, the community college degree or certificate programs can meet the prerequisites for the state certifications. Below you will find the programs listed, a general overview of their requirements and the commonalities and outliers.

In addition to this level of coursework research, we held meetings with all of our local institutions of higher learning to identify pathways, which are outlined in our “Potential Pathways to Pursue” section.

***Note:** This research work is still in progress. For phase 1 (and the purposes of the first draft of this paper), we focused primarily on community colleges and higher education institutions. For phase 2 (later 2024), we plan to focus additional research on other potential pathways, including workforce boards, internships and externships, nonprofit training collectives and more. An updated version of the paper will be shared at that point.*

#### **LOCAL RESEARCH: COLLEGE DEGREE AND CERTIFICATE PROGRAMS**

In the section below, we outline the college programs containing coursework in human services, leading to certificates or degrees, that are available in the Portland Metro region. Under each program there is a synopsis, required coursework and a cost estimation. The cost estimations do not include financial aid. Financial aid can have a significant impact on

the cost of a program. Students can enroll in community college programs without a high school diploma or GED, but you do need one or the other to apply for the Free Application for Federal Student Aid (FAFSA).

## COMMUNITY COLLEGE CERTIFICATE PROGRAMS

The three community colleges in the Portland Metro region (Clackamas Community College, Mt. Hood Community College and Portland Community College) offer the following human services adjacent certificate programs. These programs can be offered in-person, online or in a hybrid learning environment. Some are advertised or encouraged as precursors to state certifications like the Certified Alcohol and Drug Counselor which are described in detail in a later section.

If a person is enrolled at a community college in either a certificate or associate degree program, they have access to the college's student support resources. Clackamas Community College, Mt. Hood Community College and Portland Community College all have designated staff for helping students struggling with their basic needs (housing, hunger, childcare and more). They also all have career planning assistance, tutoring and veteran centers.

Notably, the community college certificate programs are the fastest higher education programs to complete and often the most affordable. Three of the below certificate programs (Human Services Generalist Certificate of Completion at Clackamas Community College, Behavioral Health Care Specialist Certificate at Mt. Hood Community College and the Foundations in Human Services Career Pathway Certificate at Portland Community College) have associate degree programs of the same nature at their institutions. You will find breakdowns for those associate programs in the next section. Enrolling in a certificate program instead of an associate program can reduce costs by skipping general education requirements and shortening the time commitment (Boise State, 2024).

- **Alcohol and Drug Counselor Career Pathway Certificate of Completion,**  
Clackamas Community College
  - **Synopsis:** Completion of this program is meant to prepare the student for the Mental Health and Addiction Certification Board of Oregon (MHACBO) Certified Drug and Alcohol Counselor (CADC) exam and provides a foundation for a career in substance abuse treatment.
  - **Length of program:** This program can be completed in as little as one term, or three to four months, depending on how many credits the student takes each term.
  - **Includes coursework on:** substance use, diagnosis and treatment of substance abuse, ethics, group counseling, infectious disease and interviewing.

- **Estimated cost:** Tuition is around \$2,400 for the entire program (Clackamas Community College, n.d.).
- **Human Services Generalist Certificate of Completion, Clackamas Community College**
  - **Synopsis:** This certificate will prepare individuals to work on the front lines of social services, empowering individuals and families facing challenges. They may provide direct services, advocate for clients' rights and needs, and connect them with essential community social service resources.
  - **Length of program:** This program can be completed in as little as one academic year, or nine months.
  - **Includes coursework on:** community resources, ethics, family systems, general interviewing skills in human services, introduction to human services, math, practicum, practicum seminar and writing.
  - **Estimated cost:** Tuition is around \$6,255 for the entire program (Clackamas Community College, n.d.).
- **Behavioral Health Care Specialist Certificate, Mt. Hood Community College**
  - **Synopsis:** Completion of this certificate is designed for graduates to obtain entry level behavioral health care jobs, specifically mental health care, social services and addiction counseling.
  - **Length of program:** This program can be completed in one academic year (three quarters), or 9 months.
  - **Includes coursework on:** substance use, case management, diagnosis and treatment of clinical disorders, interviewing, introduction to human services, motivational interviewing, practicum, practicum seminar and writing.
  - **Estimated cost:** Tuition is around \$4,300 for the entire certificate (Mt. Hood Community College, n.d.).
- **Youth Worker Certificate, Mt. Hood Community College**
  - **Synopsis:** The Youth Worker program is designed for those want to work with at-risk youth. Youth workers provide support, outreach, interventions and conflict resolution to children and young adults.
  - **Length of program:** This program can be completed in four quarters, one year, spanning over two academic years.
  - **Includes coursework on:** substance use, career planning, CPR/first aid, diagnosis and treatment of clinical and personality disorders, group counseling, interviewing, introduction to human services, juvenile justice, math, motivational interviewing, practicum, practicum seminar, psychology/human development and writing.

- **Cost estimate:** Tuition is around \$6,200 (Mt. Hood Community College, n.d.) for the entire program.
- **Foundations in Human Services Career Pathway Certificate**, Portland Community College
  - **Synopsis:** PCC's Family and Human Services program prepares individuals for entry-level human service work in a diversity of environments under the direction of professionals including social workers, educators, counselors, psychologists, and other specialists.
  - **Length of program:** This program can be completed in as little as one term, or 3 months.
  - **Includes coursework on:** direct service, family systems, introduction to human services, mental health first aid, social systems and suicide prevention.
  - **Cost estimates:** Tuition is around \$2,200 (Portland Community College, n.d.) for the entire certificate.

In summary, there are five community college certificate programs related to human services in the Portland Metro region. They have overlapping areas of study including coursework on substance use, introduction to human services, group counseling, interviewing, ethics, diagnosis and treatment of mental health disorders, writing and mental health first aid. Nearly every certification and degree program found, including the above five, requires a practicum or internship and a seminar class to accompany it.

Our research indicates that nearly every education program and certification require a practicum and a practicum seminar. A practicum or internship is on-the-job learning where a student is placed at an agency, usually with intentional supervision by a staff member, and given a set of entry-level tasks to introduce them to the work. The seminar class that usually accompanies these practicums is a place for students to debrief their placements and apply the concepts they've been learning to their field experiences with the guidance of an instructor.

There are variances between the programs based on subject matter. For example, Mt. Hood Community College's Youth Worker Certificate has unique coursework on the juvenile justice system. Clackamas Community College's Alcohol and Drug Counselor Career Pathway Certificate of Completion requires an Infectious Diseases and Harm Reduction class, coursework uniquely related to substance use disorders.

We have identified that the degree programs across community colleges are not directly transferrable or complete facsimiles of each other. Take for example Clackamas Community College's Human Services Generalist Certificate of Completion and Portland Community College's Foundations in Human Services Career Pathway Certificate. Both have similar anticipated outcomes but require separate classes with only some overlap (coursework on family systems, an introduction to human services, and substance use). In our meetings

with community colleges, we learned this might be the result of each college having to create their own curriculum and have it approved by the Oregon Department of Education, rather than simply having the ability to share curriculum across community colleges.

There are several learning areas included in the certificate programs above that could be included in a housing service case worker certification, as outlined above in section II. For example, mental health first aid, basics of case management, suicide prevention and motivational interviewing. However, there are learning areas desired for this program that are not included in the certificate programs, including but not limited to basics of housing system navigation; data; diversity, equity and inclusion (DEI); trauma informed care and self-care.

## **COMMUNITY COLLEGE ASSOCIATE DEGREES**

Associate degrees are generally two-year degree programs at community colleges. Below are the associate degree programs related to human services that community colleges in the area offer. They can also be prerequisites to the state certifications outlined in the next section. The advantages of getting an associate degree include creating a springboard to a bachelor's degree program and/or fulfilling an education requirement for a job.

- **Human Services Generalist Associate of Applied Science**, Clackamas Community College
  - **Synopsis:** Clackamas Community College's Human Services Generalist associates degree aims to prepare individuals to work on the front lines of social services. This might mean providing direct services, advocating for clients' rights and needs, and connecting them with essential community resources.
  - **Length of program:** This program typically takes two academic years to complete.
  - **Includes coursework on:** substance use, case management, child abuse, community resources, CPR/first aid, ethics, family systems, group counseling, interviewing, intimate partner violence, introduction to human services, math, medical terminology, motivational interviewing, practicum, practicum seminar, psychology/human development, sexual abuse, social systems, trauma informed care and writing.
  - **Estimated cost:** Tuition costs around \$12,700 for the entire program.
- **Mental Health, Social Service, and Addiction Counseling Associate of Applied Science**, Mt. Hood Community College
  - **Synopsis:** The Mental Health, Social Service, and Addiction Counseling program aims to prepare students to work with the emotional, social, and physical needs of clients in settings that include: mental health agencies, social service, substance use treatment, corrections, residential facilities,

schools, youth work, gerontology (working with the elderly) and more. Upon completing this program, students are eligible to take the test to receive their Certified Drug and Alcohol Counselor (CADAC) certification.

- **Length of program:** This program typically takes two academic years to complete.
- **Includes coursework on:** substance use, career planning, case management, counseling, diagnosis and treatment of clinical and personality disorders, group counseling, interviewing, introduction to human services, math, motivational interviewing, practicum, practicum seminar, psychology/human development, social justice and writing.
- **Estimated cost:** Tuition costs around \$12,700 for the entire program.
- **Family and Human Services Associate Degree, Portland Community College**
  - **Synopsis:** Portland Community College's Family and Human Services program prepares individuals for entry-level human service work in a range of environments under the direction of social workers, educators, counselors, psychologists, and other specialists.
  - **Length of program:** This program typically takes two academic years to complete.
  - **Includes coursework on:** substance use, aging, case management, counseling, direct service, family systems, introduction to human services, mental health first aid, multicultural practices, policy, practicum, practicum seminar, psychology/human development, social systems and suicide prevention.
  - **Estimated cost:** Tuition costs around \$12,000 for the entire program.

Each of the above degree programs require coursework on substance use, case management, basics of human services and psychology/human development. They also each require a practicum and accompanying practicum seminar.

The Mental Health, Social Service, and Addiction Counseling Associate of Applied Science at Mt. Hood Community College has a stronger focus on substance use disorders including coursework on pharmacology and addiction counseling. The programs at Portland Community College and Clackamas Community College have some unique course material including classes on abuse, aging, policy and mental health first aid.

Like the community college certificate programs, there are courses offered in each of the associate degree programs that might overlap with a housing service worker curriculum. Because there are more courses required for an associate degree than a certificate, there are more courses relevant to a housing service worker curriculum. They offer courses on substance use, recovery, mental health, basics of case management, some courses on multicultural practices and trauma informed care. The coursework missing from the above

degree programs that a housing service worker would need includes basics of housing navigation, client benefits and data.

## **BACHELOR'S DEGREES**

Below are all the Bachelor of Social Work (BSW) programs in the region. Like the community colleges, each of these four-year universities offers student support resources. They all have programs for academic support (tutoring, writing help, coaching), career planning, multicultural and international students, behavioral and mental health support, physical health support, and support for students with disabilities. Due to its size and to being a public institution, Portland State University, seems to offer the most resources to students. They have a basic needs navigator and a range of basic needs services. The private institutions do not appear to offer the same support. Beyond basic needs, Portland State University also has various programs targeting vulnerable student populations, like a program supporting students returning to school from incarceration.

The estimated costs listed for each Bachelor of Social Work program do not include financial aid. These programs are expensive, but often made much cheaper by income-based financial aid.

- **Bachelor of Social Work, George Fox University**
  - **Synopsis:** George Fox University's Bachelor of Social Work prepares individuals to work in a wide range of public and private social work and social welfare settings ranging from healthcare and child welfare to ministry and criminal justice.
  - **Length of program:** This is a traditional bachelor's degree program that takes four academic years to complete at minimum.
  - **Includes coursework on:** family systems, introduction to human services, math, multicultural practices, policy, practicum, practicum seminar, psychology/human development, research methods, social justice, social systems and sociology.
  - **Estimated cost:** \$168,000 for tuition.
- **Bachelor of Social Work, Pacific University**
  - **Synopsis:** Pacific University's Bachelor of Social Work is designed to prepare individuals to provide culturally sensitive generalist social work principles; advance the well-being of people; promote social and economic justice; and enhance the social functioning of individuals, families, groups organizations, and communities.
  - **Length of program:** This is a traditional bachelor's degree program that takes four academic years to complete at minimum.

- **Includes coursework on:** case management, direct service, interviewing, introduction to human services, policy, practicum, practicum seminar, psychology/human development, research methods and sociology.
- **Estimated cost:** \$225,496 for tuition.
- **Bachelor of Social Work, Portland State University**
  - **Synopsis:** Portland State University's Bachelor of Social Work program prepares students to become entry-level professional generalist social workers who will work in a variety of settings and communities.
  - **Length of program:** This is a traditional bachelor's degree program that takes four academic years to complete at minimum.
  - **Includes coursework on:** introduction to human services, policy, practicum, psychology/human development, research methods and social justice.
  - **Estimated cost:** \$47,436 for tuition.
- **Bachelor of Social Work, University of Portland**
  - **Synopsis:** The University of Portland's Bachelor of Social Work prepares graduates for generalist, entry-level social work in a wide possible range of workplaces: public agencies, private businesses, hospitals, clinics, schools, nursing homes, private practices, police departments, courts, and more.
  - **Length of program:** This is a traditional bachelor's degree program that takes four academic years to complete at minimum.
  - **Includes coursework on:** counseling, direct service, interviewing, policy, practicum, practicum seminar, psychology/human development, research methods, social justice and sociology.
  - **Estimated cost:** \$227,200 for tuition.
- **Bachelor of Social Work, Warner Pacific University**
  - **Synopsis:** Warner Pacific University's Bachelor of Social Work trains individuals to work with those in need by empowering people to make healthy changes. In addition to fostering change with individuals, students will learn how to foster change in their communities at large, enhancing and improving social systems for the better.
  - **Length of program:** This is a traditional bachelor's degree program that takes four academic years to complete at minimum.
  - **Includes coursework on:** substance use, counseling, direct service, introduction to human services, human trafficking, multicultural practices, policy, practicum, practicum seminar, psychology/human development, and research methods.
  - **Estimated cost:** \$85,040 for tuition.



The bachelor's degree programs all require general education courses in addition to the major-specific courses listed above. Their course requirements are similar to the associate degree programs, though they offer more coursework in policy, sociology, research and social justice. While the certificates and associate programs might prepare students for entry level direct services, the bachelor's degree programs have more content geared toward system analysis and research.

Bachelor's degree programs can cost hundreds of thousands of dollars without financial aid. For the above BSW programs, Portland State offers the lowest cost option at around \$50,000 for in-state tuition. University of Portland and Pacific University are at the top end of the range at around \$225,000, with a net cost of around \$135,000 after income-based financial aid is applied. The costs associated with bachelor's degree programs are adverse to our goal of creating a free or low cost barrier training program.

We did not include master's level programs, namely Master of Social Work (MSW) programs, in this research. As mentioned in the introduction, our primary goal with this program is to identify near immediate, affordable and accessible pathways for helping new frontline workers access the skills and training they need to be successful early in their career. Given the cost associated with a master's degree program, and the progressive layers of education (a bachelor's degree being a pre-requisite), we deemed it out of scope for the purposes of this research. We also did not include research on Continuing Education Units (CEUs) for similar reasons: the goal of this research is to focus on an entry level workforce pipeline, whereas CEUs are meant for workers who are already in the field trying to expand their knowledge.

Though the costs and time associated with earning a BSW are counter-intuitive to our housing service worker certification project, the BSW programs in our region are an important cornerstone of the workforce development. Many BSW students go on to earn their MSW, especially at schools like Portland State University where they have both programs. Many students go on to become therapists or counselors, or other members of the behavioral workforce. One BSW program director shared that they see alumni entering the field and being promoted quickly to supervisor or manager-level positions. This combined with education in policy and other systems-level social change create excellent public servants or human service professionals, though they may not stay on the front-line very long.

In summary, there are various human services degree and certificate programs offered through local higher education institutions. Mt. Hood Community College, Clackamas Community College and Portland Community College all offer certificates and associate degree programs related to human services. George Fox University, Pacific University, Portland State University, University of Portland and Warner Pacific University all offer bachelor's degree programs for social work. These programs contain coursework that might overlap with a housing service worker certification in areas like substance use, recovery, mental health, basics of case management, multicultural practices and trauma informed

care. All the above programs are missing coursework essential to a housing service caseworker like housing navigation, housing specific case management, client benefit navigation, data and housing specific diversity, equity and inclusion.

## **NON-CREDIT HIGHER EDUCATION OPTIONS**

In addition to the certificate and degree programs offered by our local community and four-year colleges, there are non-credit training and educational options offered. Our research found several local non-credit training options through colleges:

- Non-credit Training Certificates (NCTCs)
- Continuing Education Units (CEUs)
- Micro-Credentials
- Academic Continuing Education Courses (ACE)
- Portland State University's Center for Executive and Professional Education (CEPE)

A **Non-Credit Training Certificate (NCTC)** provides an opportunity for an individual to gain necessary training through a community college's Career and Technical Education department. They are offered at every community college in the region and are typically used by the manufacturing industry to help employees learn how to operate certain machinery. The certification could be either a single course or series of courses, with a minimum of 18 hours of training for an NCTC, up to 210 hours per certification (e.g. all of the desired trainings in the HSWC could be hosted in a single NCTC between 18-210 hours of training, or there could be standalone NCTCs for each of the subject areas of between 18-210 hours each).

Each NCTC program must be approved by the state of Oregon's Higher Education Coordinating Committee (HECC). This approval process is generally faster than standing up a new for-credit program, and the program could, theoretically, be replicated at multiple community colleges in the state (though each would be a standalone program issued on the community college's transcript.) In the process of developing this research paper, Metro's Regional Capacity Team met separately with representatives from the Career and Technical Education programs of all three of our local community colleges (Mt. Hood Community College, Portland Community College and Clackamas Community College) and a representative from HECC. While the group noted that, to their knowledge, a social service focused NCTC had not been created before in Oregon, there was interest in exploring the possibility of developing an HSWC-like curriculum that could be shared amongst the community colleges in the Portland Metro region, and perhaps, across the state.

**Continuing Education Units** are nationally recognized programs for ongoing, non-credit education. Requests for CEUs can originate from an individual, organization, or professional association (Portland Community College). They are used to upgrade a person's competency in their occupation. Some professions require CEUs to ensure their staff are up to date on industry standards and best practices.

**Academic Continuing Education Courses (ACE)** are very similar to CEUs, in that they are industry-specific and are designed as a career pathway into a certain sector/field. However, the main difference between ACEs and CEUs is the target audience. While CEUs are designed for individuals already in their field, ACEs are meant for students who have yet to obtain a position in their sector. Therefore, the key difference between the two non-credit programs is that CEUs are geared towards career advancement while ACEs are designed for career entry.

**Micro-Credentials** award a student with credentials after the completion of a series (often 2-3 courses) of related coursework. Micro-Credentials are often unique to each institution of higher education and allow each student to meet a milestone prior to the completion of a certificate program. An ACE, CEU, or NCTC program can be built around a series of micro-credentials, with certificate achievement requiring the completion of a certain amount of the micro-credentials offered in the program. Micro-credentials also allow the learner to tailor their training to their specific needs, so learners can pick and choose which skills they would like to learn more about.

An example of a current micro-credential is [PCC's Mental Health First Aid](#) program. In this program, students can choose 3 out of 4 of the available courses to enroll in. Once all three courses are complete, the student will have earned the Mental Health First Aid micro-credential.

**The Center for Executive and Professional Education (CEPE)** at Portland State University offers non-credit professional education courses tailored to the needs of the target audience. These curricula can take the form of certificate programs or direct training with organizations. CEPE offers in-house curriculum development services, with coursework being built in partnership with the contracting organization.

In summary, there are two non-credit options found at colleges in the region, one specific non-credit option found at Portland State University as well as NCTCs at each community college. Moreover, there are several additional standalone pathway options including continuing education units or micro-credentials. These non-credit avenues could be pathways for a housing service working training, but do not currently exist in that capacity. An NCTC or CEPE could be a viable fit for a housing service worker certification program. An ACE could focus on helping to certify new providers but a CEU is focused on ongoing education versus initial education. Micro-credentials could be a building block option for any of these potential pathways.

## **LOCAL RESEARCH: COMMUNITY AND BEHAVIORAL HEALTH CERTIFICATIONS**

Next are the certifications offered by the state or state sanctioned, nonprofit accreditation boards for community health and behavioral health jobs. They are not training or education programs. Each certification has different requirements usually including prior education and/or experience (including a degree), completion of an approved training program,

continuing education hours and/or an assessment. In some cases, the above listed college degree or certificate programs can meet the prerequisites for the below certifications.

Because there are multiple pathways to earning the credentials below, we did not include the length of the program, or the estimated cost listed below. The timeline and cost of each training or education program associated with each credential will depend on which organization is offering it.

## **OREGON HEALTH AUTHORITY (OHA) TRADITIONAL HEALTH WORKER (THW) CERTIFICATIONS**

According to the Oregon Health Authority, Traditional Health Workers are “trusted individuals from their local communities who may also share socioeconomic ties and lived life experiences with health plan members. THWs have historically provided person and community-centered care by bridging communities and the health systems that serve them, increasing the appropriate use of care by connecting people with health systems, advocating for health plan members, supporting adherence to care and treatment, and empowering individuals to be agents in improving their own health (para. 2).”

THWs typically work in the community or in a clinic under the direction of a licensed healthcare provider (Oregon Home Care Commission, n.d.). For a THW’s services to be billable to Medicaid, the individual needs one of the below certifications (Oregon Health Authority). The services of a THW are free to Oregon Health Plan (OHP) recipients. A patient can ask for THW support at any place they get support for their health including the doctor’s office, dentist office or school (Yamhill Community Care, n.d.).

There are five types of THW: Community Health Worker (CHW), Peer Support Specialist (PSS), Peer Wellness Specialist (PWS), Personal Health Navigator (PHN) and Birth Doula. We’ve omitted Birth Doula from the research below due to its narrow scope and distant relation to a housing service worker. For all the THW certifications the recipient needs a degree or to have completed an approved training program. The state of Oregon has a list of approved training programs and a policy listing the required trainings and/or coursework for each type of certification. Approved trainings can be offered by academic institutions like community colleges or community-based organizations (CBOs) and nonprofits.

- **Community Health Worker (CHW)**
  - **Synopsis:** A CHW may provide culturally specific education, information, programming, navigation, peer counseling and first aid to a community. To the extent possible, the CHW will share ethnicity, language, socioeconomic status and life experiences with the community they serve.
  - **Requires coursework on:** case management, communication, community engagement, community resources, conflict resolution, crisis intervention, data, ethics, group counseling, health, infectious diseases, mandatory reporter, motivational interviewing, multicultural practices,

psychology/human development, self-care, suicide prevention, system navigation, teaching, trauma informed care and work readiness.

- **Peer Support Specialist (PSS)**

- **Synopsis:** A PSS provides services to another individual who shares a similar life experience with the peer support specialist (addiction to addiction, mental health condition to mental health condition, family member of an individual with a mental health condition to family member of an individual with a mental health condition) (Oregon Health Authority, n.d.). They can provide a variety of supportive services including but not limited to employment assistance, counseling, mentoring, goal-setting and housing navigation.
- **There are four sub-categories of PSS:** Family Support Specialist, Youth Support Specialist, Recovery Peer and Mental Health Peer.
- **Requires coursework on:** addiction, case management, communication, community engagement, community resources, conflict resolution, crisis intervention, data, ethics, health, infectious diseases, mandatory reporter, motivational interviewing, multicultural practices, psychology/human development, self care, suicide prevention, system navigation, trauma informed care and work readiness.

- **Peer Wellness Specialist (PWS)**

- **Synopsis:** A PWS works with coordinated care organization (CCO) members to provide support, resources and system navigation for mental health disorders, substance use disorders, and general wellness.
- **Requires coursework on:** substance use, case management, communication, community engagement, community resources, conflict resolution, crisis intervention, data, ethics, group counseling, health, infectious diseases, mandatory reporter, motivational interviewing, multicultural practices, psychology/human development, self care, suicide prevention, system navigation, trauma informed care and work readiness.

- **Personal Health Navigator (PHN)**

- **Synopsis:** A PHN provides information, assistance, tools and support to enable a patient to make the best health care decisions in the patient's particular circumstances and in light of the patient's needs, lifestyle, combination of conditions and desired outcomes (Oregon Health Authority, n.d.).
- **Requires coursework on:** case management, communication, community engagement, community resources, conflict resolution, data, ethics, health, infectious diseases, mandatory reporter, motivational interviewing, multicultural practices, psychology/human development, self care, suicide prevention, system navigation, trauma informed care and work readiness.

- As of March 2023, there are no existing trainings for the Personal Health Navigator certification. The only way to become certified is by applying for credit for prior education and work experience (Trillium Community Health Plan, 2023).

The required training areas for the four Oregon Health Authority certifications above are very similar, you will see their required coursework for each certification almost entirely overlap: case management, trauma informed care, health, community engagement, and more. Variances include the Community Health Worker certificate being more geared towards large-scale community change and including coursework around teaching and group counseling. The Peer Support certifications include coursework on substance use, while the others do not, or at least not to the same degree.

There are training areas required by the THW certifications that would overlap with housing service worker certification training requirements: multicultural practices, conflict resolution, trauma-informed care and others. However, these certifications are deeply tied to the healthcare system and Coordinated Care Organizations (CCOs). Even if there are similar required learning areas, the THW trainings come with a healthcare lens while we need a housing lens. For example, the state requires THWs to be trained on data collection and types of data (Oregon Health Authority, May 2023), but the healthcare and housing systems use separate information systems. A data training for one sector will miss important points for another.

Generally, like the college-based training programs outlined above, the THWs are missing required learning on housing navigation and diversity, equity and inclusion topics specific to housing. Overall, the THW training requirements appear to have more overlap with a housing service worker certification than the colleges.

## **MENTAL HEALTH AND ADDICTION CERTIFICATION BOARD OF OREGON (MHACBO) CERTIFICATIONS**

MHACBO is a private non-profit sanctioned by the state to provide a variety of behavioral health certifications. The primary purpose of MHACBO certification is “assurance that behavioral health workers have met minimum standards of competence, are ethically accountable to the general public at-large, and have contemporary knowledge evidenced through continuing education (MHACBO, n.d.)”

Like the Traditional Health Worker certifications, the MHACBO certifications often require a degree or completion of an approved training program. For most of the certification, there is a degree path and a non-degree path.

There are five different types of MHACBO certifications and all but one of them have multiple levels. The requirements for each level vary slightly by certification type, but most require some combination of a degree, supervised hours in the field, continuing education in the field and/or an assessment or exam. The advantages of a higher-level certificate may

include a higher earning potential, broader opportunities for potential employment, and lack of supervision requirements and therefore the potential to run a private practice.

- **Qualified Mental Health Associate I and II (QMHA) and Qualified Mental Health Professional (QMHP)**
  - **Synopsis:** The QMHA certification is for individuals working at state approved mental health programs who are seeking employment at state approved mental health programs.
  - The QMHP certification is a level above QMHA II, requiring all the same coursework and a master's degree.
  - **Requires coursework on:** substance use, case management, communication, counseling, health, introduction to human services, practicum, practicum seminar, psychology/human development, sociology, teaching, care coordination and jurisprudence.
- **Certified Drug and Alcohol Counselor I, II and III (CADC)**
  - **Synopsis:** The Certified Drug and Alcohol Counselor certificate is for anyone seeking employment as a substance abuse counselor in a variety of different settings including mental health centers, community health centers, prisons, and private practices.
  - **Requires coursework on:** substance use, counseling, diagnosis and treatment of mental health disorders, ethics, infectious diseases and multicultural practices.
- **Certified Gambling Addiction Counselor I and II (CGAC)**
  - **Synopsis:** For anyone seeking employment in a problem gambling treatment program.
  - **Requires coursework on:** case management, counseling, crisis intervention, diagnosis and treatment of mental health disorders, ethics, financial planning, gambling specific case management and multicultural practices.
- **Certified Prevention Specialist (CPS)**
  - **Synopsis:** Similar in coursework to a CADC, but more focused on the prevention of substance abuse and other issues through education, outreach and community building.
  - **Requires coursework on:** substance use, community engagement, ethics, multicultural practices, teaching and work readiness.
- **Certified Recovery Mentor I and II (CRM)**
  - **Synopsis:** For anyone seeking employment as a substance abuse recovery mentor. CRMs must also complete a peer training program.

- **Requires coursework on:** substance use, case management, communication, community engagement, community resources, conflict resolution, crisis intervention, data, ethics, health, infectious diseases, mandatory reporting, motivational interviewing, multicultural practices, psychology/human development, self care, suicide prevention, system navigation, trauma informed care and work readiness.

The five certifications from MHACBO each require training and education on addiction, specifically substance abuse. Nearly every certification also requires coursework on multicultural practices and ethics. The Certified Gambling Addiction Counselor focuses on treating addiction in the form of gambling. The Qualified Mental Health Associate certificate requires more general knowledge and learning about human services and social systems than the other certificates.

The Certified Recovery Mentor (CRM) requires more comprehensive learning about skills akin to case management. While the other certifications are more geared towards identifying and treating an acute and active addiction, the CRM is equipped with skills to promote self-sufficiency and independence. This includes course material on community resources, system navigation, conflict resolution and motivational interviewing.

Though none of the state certifications except the QMHA require a practicum as part of their coursework, they all require supervised hours of experience in the field which equates to an internship or practicum. Certification candidates can complete their supervised hours in an approved addiction treatment center as a paid employee, volunteer and/or student. If they choose a degree path to obtain certification, there will be a practicum built into their degree program than will contribute towards their certification hours (Addictions Counselor, n.d.).

The MHACBO and potential housing service worker training theoretical course descriptions outlined in Section II overlap in a few areas: addiction, recovery, case management and multicultural practices. We see training areas missing from the MHACBO certifications like housing navigation, benefits navigation, data, DEI with a housing focus, and self-care. The addiction-specific training requirements for the MHACBO certifications are relevant to housing service workers, but not necessary for the type of work a housing service worker would be doing.

In summary, there are several state-level certifications for community and behavioral health workers. These certifications are offered by the Oregon Health Authority and the Mental Health and Addictions Counseling Board of Oregon respectively. Both sets of certifications require learning in areas related to what a housing service worker might need to know, but neither offer housing-specific education requirements in housing case management, housing navigation, DEI, or data. Workforce needs in our community are being met or supported by these certifications specific to community health, behavioral health, drug and alcohol addiction, but there is no certification specific to housing that meets a similar need.



#### IV. NATIONAL MODELS AND OTHER TRENDS

In the national scan of certification and trainings we found several different models being used to train and/or certify people to work in homeless services. In our findings, there were few programs across the United States doing this work. While there are examples we could learn from, none are directly replicable for what we are seeking to create—a comprehensive training for frontline workers to begin work in housing and homeless services settings.

Our initial research scope was focused on programs that prioritized people with lived experience and peer work in homeless services, but we found few examples. In response, we broadened the scope to include program entry and curriculum for anyone, not just those with lived experience. With that broadened scope, we found several certifications and degrees in college settings, advocacy trainings, virtual trainings and an example of one program that combines virtual training with resume and job placement support.

- **The advocacy training** courses are designed for people to increase their leadership skills and advocate for effective policies to address homelessness (at a state legislature or city council meeting, for example), simultaneously they can also support professional development of staff already in the field who want to leverage their experience toward systemic change.
- **The college programs** vary in their objectives, from focusing on preparing frontline staff for the workforce to providing a steppingstone to more advanced degrees.
- **The virtual trainings** offer flexibility and more of an abundance of training topics, providing options for when and what trainings a person needs (for example, on demand trainings in topics like trauma informed care or culturally responsive street outreach).

Several of the higher education programs we researched were just getting started and thus there is not yet clarity on the program outcomes or success. For instance, Santa Monica College's Homeless Service Work certificate has their first cohort starting in the fall (2024) and San Diego City College's Program for Engaged Educational Resources has only been around for 3 years.

Without adequate historical data on the programs, we are unable to identify any inequities that might be occurring, or the job placement rate success of graduates. We hypothesize that the most impactful program designs were informed by engaging people with lived experience, industry veterans and experts, provide opportunities for practicums in the field, and provide counselors that can assist students with resume and job placement support. We also believe buy-in and partnership early on from service providers and Continuum of Care leaders are essential to the immediate and long-term success of the programs.

In the section below, we outline the national models we identified in our research. To differentiate among the different models of training and certifications, they are separated in

this section by college certificate programs, Associate level college programs, advocacy training programs, virtual training and other programs.

## COLLEGE CERTIFICATES

There are several colleges on the West Coast that feature curriculums designed for students pursuing work in homeless services. In our research, we did not find any comparable examples in other parts of the United States. In our findings, San Diego City College's Program for Engaged Educational Resources appears to be the first of its kind in the nation with a comprehensive approach to in-class learning, practicum, and job placement support for incoming social service workers. That program launched in 2021.

The Santa Monica College Homeless Service Work Certificate program is launching its inaugural year in the fall of 2024 and offers in-class learning with job placement support. The Care Navigation and Coordination certificate program at Seattle Central College would be a good fit for someone already employed in the social and human services workforce to learn about navigation through social service and healthcare systems.

- **Program for Engaged Educational Resources (PEER)**, San Diego City College
  - **Synopsis:** This certificate program is designed for those interested in human and social services work. The curriculum focuses specifically on the field of homeless services and students are offered an academic counselor, career coach for resume and job searching skills and job fairs with homeless services organizations. The program was created through a partnership between San Diego Housing Commission and the college.
  - **Length of program:** This program can be completed in one academic term, or two to three months.
  - **Includes coursework on:** counseling, homeless services, introduction to human services and system navigation.
  - **Estimated cost:** San Diego City College charges \$46 per unit. This is a two unit course, coming to a total of \$92 for tuition.
- **Homeless Service Work Certificate**, Santa Monica College
  - **Synopsis:** This certificate will prepare individuals to work on the front lines of social services, empowering individuals and families facing challenges. Those certified may provide direct services, advocate for clients' rights and needs, and connect them with essential community resources. The curriculum was developed by industry experts. The program includes partnering with people who have experience with the work and will also assist them with finding jobs.
  - **Length of program:** This program takes one academic year to complete with students attending part-time.

- **Includes coursework on:** community resources, ethics, family systems, interviewing, introduction to human services, math, practicum, practicum seminar and writing.
- **Estimated cost:** This program is free for the 25 students admitted to the inaugural cohort. The program funding and accompanying scholarships are provided by a contract with the Los Angeles Housing Services Authority.
- **Care Navigation and Coordination Certificate, Seattle Central College**
  - **Synopsis:** This certificate program is designed to prepare students to assist people through navigating social services and healthcare systems.
  - **Length of program:** This program takes 2 quarters to complete if a student is attending part time, or 6 months.
  - Both classes for this certificate are focused on system navigation.
  - **Estimated cost:** \$1,250-\$1,500 depending on if the student lives in Washington or not.

## ASSOCIATE DEGREE

There are a number of associate degrees in social and human services across the country and there are some that have focused coursework specific to homeless services. Featured here are two west coast colleges.

- **Social & Human Services Associate of Applied Sciences Transfer Degree, Seattle Central College**
  - **Synopsis:** This associate transfer degree program is meant to serve students interested in helping professions, they have the option of choosing a general or chemical dependency track. The curriculum is designed to teach critical analysis, problem solving and offers experiential learning opportunities. This program includes a supervised 330-hour community-based field practicum.
  - **Length of program:** This program typically takes two academic years to complete.
  - **Includes coursework on:** substance use, case management, crisis intervention, DEI, ethics, grief and loss, group counseling, interviewing, introduction to human services, math, mental health, policy, practicum, psychology/human development, suicide prevention, system navigation and writing.
  - **Estimated cost:** \$10,000-\$11,000 depending on whether or not the student is a resident of Washington.
- **Associate of Arts in Behavioral Sciences: Social Work, San Diego City College**

- **Synopsis:** This associate degree program is designed to prepare students for entry-level work in applied and paraprofessional occupations in the social services field and/or to transfer to four-year colleges. It isn't specific to the homeless services field but includes coursework preparing students for positions like a case manager aid, social work aid and community outreach worker.
- **Length of program:** This program typically takes two academic years to complete.
- **Includes coursework in:** biology, counseling, economics, introduction to human services, math, psychology/human development and sociology.
- **Estimated cost:** \$2,000 for residents of California.

## ADVOCACY TRAININGS FOR PEOPLE WITH LIVED EXPERIENCE OF HOMELESSNESS

Featured in this section are several advocacy programs for people with lived experience. Participants who complete these programs often describe that beyond the practical skills they learn, they feel a renewed sense of agency, empowerment and personal growth. Potential outcomes for learners in these advocacy programs include becoming community leaders, advisors, housing services staff, engaging in public speaking or organizing efforts. Their involvement in advocacy ensures that the voices of those who have been homeless are central in shaping policies and services that truly address the challenges they face. These programs are not intended to be comprehensive trainings for a frontline service worker to enter the workforce but are an avenue for personal and professional development, a pairing or building block to work in homeless or other social and human services.

- **Speak Up!**, Corporation for Supportive Housing
  - Speak Up! is a curriculum designed to help empower people with lived experience to become community leaders. Over the course of a year, formerly homeless individuals attend monthly classes on housing policy, advocacy, storytelling and personal narrative development. They also receive coaching on public speaking and get opportunities to advocate to local and national levels of leadership. The program is popular in California, specifically Los Angeles, but there have been Speak Up! programs in other states as well, including one recently launched in Indianapolis, Indiana. They offer this program virtually or in-person but the in-person option is more common. The training lasts between six and twelve months.
- **Lived Experience Training Academy (LETA)**, National Coalition for the Homeless
  - LETA curriculum was designed and developed by Dr. Rajni Shankar-Brown with the assistance of people throughout the United States who were currently or formerly experiencing homelessness in focus group interviews. LETA has the dual purpose of creating graduates who are candidates for

advisory roles and employment in homeless services. Completion of the program results in a professional certificate from Stetson University.

- Includes the following courses: communication, coalition building, conflict resolution, financial wellbeing, history of homelessness, inclusive leadership, organizing & advocacy, public policy contextualization, technology literacy and wellness & self-care.
- **Residents Organizing for Change (ROC)**, Neighborhood Partnerships, Oregon
  - ROC is a statewide organizing agency for residents of affordable housing, frontline staff and those in need of housing that focuses on affordable housing advocacy by training members to testify and share their stories with policy makers. As a program of Neighborhood Partnerships and the Oregon Housing Alliance, ROC members typically advocate during the Oregon Legislative Session.
  - ROC has sister organizations in California (Residents United Network, RUN) and Washington State (Resident Action Project, RAP).
- **Street Roots Ambassador Program**, Street Roots, Portland
  - Born out of the COVID-19 pandemic, Street Roots ambassadors were vendors (people who were currently experiencing or had experienced homelessness) who supported their fellow houseless neighbors with important public health information and other essential services during the pandemic.
  - The Ambassadors have been engaged to conduct surveys with people experiencing homelessness for Portland State University and continue to conduct outreach as well as engage in “civic circles,” facilitated conversations with community groups.

## **OTHER MODELS**

- **The Homeless Leadership Academy**, Florida Coalition to End Homelessness
  - The Homeless Leadership Academy is an initiative through the Florida Coalition to End Homelessness. It was developed with the strong backing of several Florida Continuum of Care leaders and funded through allocation from the Coalition’s local Continuum of Care’s Youth Homeless System Improvement grant via HUD. It was designed through the support of AmeriCorps Florida and will be managed by AmeriCorps VISTA members in the future through the Coalition. The program was created with a focus on bringing youth aged 16-24 with lived experience through their program and into 5-10 month long service work placements but anyone with lived experience can take their online trainings.
  - Includes coursework in: introduction to homelessness, introduction to Housing First, cultural competency and responsiveness, Mental Health First

Aid, harm reduction, homelessness problem solving (diversion), Data Matters: HMIS, determining and documenting homelessness and housing 101.

## VIRTUAL TRAININGS

Virtual training centers offer access to people no matter where they are located allowing flexibility. Some but not all trainings include certification of completion.

- **The Alliance Center for Capacity Building (the Center)**, National Alliance to End Homelessness
  - The Center operates through the National Alliance to End Homelessness, which is a nonpartisan, nonprofit organization focused on preventing and ending homelessness through advocacy, research, and policy development. They offer some training in-person but also have numerous courses that are online and self-paced. The courses range from a focus on the Housing First Approach, history of homelessness, outreach, system design, rapid re-housing, emergency shelter, and diversion and problem-solving strategy training.
  - Includes trainings online in: improving street outreach as a community, racial equity, rapid re-housing, trauma-informed care in homeless response, using data to analyze racial disparities in the homelessness system, historic and ongoing structural racism, Understanding How We Got Here: How Historic and Ongoing Structural Racism Create Racial Disparities, Housing First, harm reduction, cultural humility and effective emergency shelter.
- **Homeless and Housing Resource Center (HHRC)**, Substance Abuse and Mental Health Services Administration (SAMHSA)
  - The HHRC was developed through a grant from the Substance Abuse and Mental Health Services Administration (SAMHSA) of the U.S. Department of Health and Human Services and is operated by Policy Research, Inc. The HHRC offers free, self-paced, online courses that focus on evidence-based approaches to housing and treatment models for people experiencing or at-risk of homelessness who also have mental illness, emotional disturbance, substance use disorders and/or co-occurring disorders. The courses are accredited and count toward continuing education units with the National Association of Social Workers.
  - Includes courses in: hoarding disorder, trauma-informed outreach and engagement, supporting people who use methamphetamine, whole-person care for opioid use disorder, serious mental illness and homelessness, treatment models and engagement, housing models, housing navigation, and engagement.

- **Supportive Housing Training Center**, Corporation for Supportive Housing (CSH)
  - The Supportive Housing Training Center is developed and managed by CSH. CSH is a nonprofit organization that promotes supportive housing as a solution for addressing homelessness. The training center offers free, on-demand virtual trainings, in addition to live virtual and in-person trainings for a fee. Recently, the Supportive Housing Training Center was accredited by the International Accreditors for Education and Training (IACET), meaning that most live webinars in the Supportive Housing Training Center now qualify for Continuing Education Units (CEUs).
  - Includes courses in: behavioral health, property management and development, healthcare, supervision, supportive services trauma-informed approaches, harm reduction, promoting housing stability through active engagement, and navigating service coordination in supportive housing.
- **C4 Innovations**
  - C4 Innovations came out of a project called the Homelessness Resource Center, a Substance Abuse and Mental Health Services Administration (SAMHSA) initiative. Their focus is on promoting equitable access to recovery, wellness, and housing stability for marginalized people. They emphasize racial equity and utilize person-centered, trauma-informed, and recovery-oriented approaches to improve the quality of care and support for diverse communities. Their online learning platform offers live and on-demand self-paced courses in a number of different topics related to homeless services.
  - Includes courses in: LGBTQ client engagement, case management best practices, intimate partner violence and homelessness, housing focused outreach, and equity and inclusion: navigating systemic marginalization.
- **HUD Exchange**
  - The HUD Exchange is a website of the U.S. Department of Housing and Urban Development and offers thousands of trainings, both video recordings and self-paced modules, with a focus on compliance with and technical assistance for federal programs, funding streams and software systems. The website also has trainings and webinar recordings on system-level strategies for topics like supporting an aging population with their housing needs. The intended audience for many of these trainings seems to be housing system administrators or people making strategic service decisions at an organizational leadership level. The library is vast, meaning that there may be trainings that are useful for incoming frontline staff, but these trainings can be difficult to sort, and given that they go back as far as 2008, there are likely trainings that are no longer relevant to current best practices.

- Includes courses in: Fair housing law compliance, strategies to advance housing first, principles of street outreach, application and administration of public housing vouchers and implementation of myriad other federal programs.

Existing degree, certificate and training programs in the region contain coursework relevant to a housing service worker certification, but housing-specific trainings are missing. The National Alliance to End Homelessness and Corporation for Supportive Housing have trainings that meet some of the gaps including trainings on diversity, equity and inclusion with a homelessness lens; overviews of harm reduction in housing and homelessness, and fundamentals of supportive housing. A possible near-term pathway could be scaling up those trainings.

In summary, our national scan turned up three different types of models to train people in homeless services: advocacy programs, college programs and virtual training platforms. None appear to be what our region needs: a comprehensive training for frontline workers to begin work in housing and homeless services settings. These models found around our country illuminate some best practices as we decide the best pathway for our region.

If we were to take all these national models, pull out pieces from each and build something in the Portland Metro region, it might look like this:

- Use the findings from engagement with national experts, local leaders, funders, local and national program implementers and people with lived experience to hear what curriculums, environments and supports are necessary for people to go from training to the frontline work.
- Include training or course offerings on Mental Health First Aid, Housing First, harm reduction, equity and inclusion, data, history and policy in context, case management, trauma informed care, and introduction to human development.
- Create partnerships that allow for experiential learning in shelters and on the streets with outreach workers and other frontline spaces.
- Address barriers with accessible training: translation and interpretation, childcare, various instructional methods and free or low-cost, computer skills training, among other strategies to increase accessibility.
- Peer mentorship after completion of the program to create connection and support networks.
- Options for supportive services for students/trainees during and after completion of the program.
- Resume and job search support, strengthened by SHS organization partners that ensure living wage jobs.
- Post-grad opportunities for additional trainings beyond the baseline certification courses.



## V. POTENTIAL PATHWAYS TO PURSUE

Based on the research above, along with a series of community engagement meeting with experts in higher education and workforce development (the full contents of which you can read in Appendix A), we have identified a number of pathways we could consider pursuing in developing a Housing Service Worker Certification.

Because our initial phase of research centered institutions of higher education, the identified pathways below are associated with them. Our next phase of research will involve exploring opportunities outside of higher education where a housing service worker certification could be hosted. This includes, but is not limited to, looking into workforce board's ability to provide accreditation to a training, exploring if we can scale-up and/or centralize trainings at an existing nonprofit, and learning about existing internship and apprenticeship programs to see if they might be applicable and replicable for a housing service worker.

### HIGHER EDUCATION PATHWAYS

This section of the paper outlines the various pathways our research identified that may be pursuable at institutions of higher education, along with what implementation would look like, and our estimation of benefits and detriments. These pathway options were identified by both hard research, and anecdotal conversations with interested parties at institutions of higher education (see Appendix A for a summary of those meetings). A future iteration of this paper will potentially include other pathways identified in further research.

The pathways identified below are:

1. Identify/supplement already existing programs at an institution of higher education
2. Develop a Non-Credit Training Certificate (NCTC) at a community college's professional development and training department.
3. Stand up a program at PSU's Center for Executive and Professional Education (CEPE)

#### 1. PATHWAY OPTION: IDENTIFY/SUPPLEMENT ALREADY EXISTING PROGRAMS

##### CONCEPT

Using research outlined above, identify similar academic programs in the region that have a similar scope to the theoretical courses outlined in Section II for a Housing Service Worker Curriculum (HSWC), supplementing housing related material into the curriculum where appropriate.

##### IMPLEMENTATION

1. Identify similar academic programs in the region that have a similar scope to HSWC. (e.g. PCC's Foundations in Human Services Career Pathways Certificate).
2. Review course descriptions and identify existing curriculum content.

3. Compare/contrast already existing curriculum content with what providers have identified to be priority training areas.
4. Supplement existing courses with additional content/classes, focused primarily on the HSWC project. (e.g. Basics of Housing System Navigation)

### **BENEFITS**

- Faster than developing a brand-new curriculum and getting a certification approved by the state.
- Results in college credit.
- Participants would have access to the institution's student support services.

### **DETRIMENTS**

- The program would be set at each college or university and not easily replicable across colleges (programs that are transcribed at institutions of higher education must stay at those institutions).
- Difficult to pair with an internship program.
- There is significant desired coursework that would need to be added on, potentially extending the course without credit.

## **2. PATHWAY: NON-CREDIT TRAINING CERTIFICATE (NCTC)**

### **CONCEPT**

A Non-Credit Training Certificate (NCTC) provides an opportunity for an individual to gain necessary training through a community college's professional development and training department. They have traditionally been used by the manufacturing industry. They do not qualify for college credit.

While an NCTC has never been created for the social service workforce before, our conversations with the workforce departments at our local community colleges, as well as the State of Oregon Higher Education Coordinating Committee (which approves NCTCs) were promising with interest in potentially pursuing this pathway.

We believe the process would look something like this:

- Contract with the Professional Development and Training Department at either Mount Hood Community College (MHCC), Portland Community College (PCC), or Clackamas Community College (CCC) to develop an NCTC curriculum based on our service worker framework.
- Once developed, the HSWC curriculum will be turned into either a Non-credit Training Certificate Program (for those already employed in the field and desiring

additional training) or a Continuing and Technical Education program (for those who are not yet working in the field).

## **IMPLEMENTATION**

Options for implementation in this pathway include:

- Develop one NCTC to encompass the entire HSWC curriculum.
- Develop several NCTC's, with each certificate focusing on one topic area from the curriculum. \*

For both of these options, we believe contracting with an individual who has experience with pedagogy, particularly curriculum development and adult education will be critical to success.

\*Our research has highlighted the importance of developing a foundations course that is a pre-requisite for the specialized courses. This will allow for all students who are new to the field to understand the baseline skills needed to perform their scope of work, before diving into more specialized topics, which may be continued education.

## **BENEFITS**

- A shared curriculum could be replicated across multiple community colleges (though that has not been done before).
- The development of an NCTC is very user driven, allowing the HSWC curriculum to be built with provider input, being responsive to the needs of organizations in the region.
- Faster to develop/launch than an accredited program.
- Credentials can be applied toward traditional academic degrees through a "credit for prior learning" process, which exists at all local community colleges.
- NCTC courses can be offered at whatever frequency is needed rather than on a semester or quarter system as is typical for institutions of higher learning.
- Program can begin while waiting for accreditation approval from the state of Oregon Higher Education Coordinating Committee.

## **DETRIMENTS**

- The student/employee usually would not receive college-credit.
- Lengthy process to develop a curriculum and then become state certified (in our discussions, we heard that it's still much faster than developing a new, accredited program).
- Difficult to pair with an internship program.

- Each NCTC program is unique to the institution of higher learning (though could be more easily replicated than an accredited program).
- An NCTC has not yet been created for the social service system and hasn't been replicated across community colleges (but there is interest in trying it based on our conversations.)

### **3. PATHWAY: PSU'S CENTER FOR EXECUTIVE AND PROFESSIONAL EDUCATION (CEPE)**

#### **CONCEPT**

The Center for Executive and Professional Education (CEPE) at PSU offers non-credit professional education courses tailored to the needs of the target audience. These curricula can take the form of certificate programs or direct training with organizations. CEPE offers in-house curriculum development services, with coursework being built in partnership with the contracting organization.

Contract with PSU's Center for Executive and Professional Education (CEPE) to engage in HSWC curriculum development.

#### **IMPLEMENTATION**

Once the HSWC curriculum is developed, launch the program within CEPE at PSU. There are four primary models that can be implemented:

1. Certificate of achievement for the completion of a course,
2. Micro-credentialing, where each student will receive a credential for each course they take, culminating in a certificate of achievement,
3. Licensing the curriculum, and granting individuals access to the material through a code, or
4. Badging, where students receive badges for successful skill attainment.

#### **BENEFITS**

- Faster to develop/launch than an accredited program.
- Students would have access to support services through PSU.

#### **DETRIMENTS**

- The student/employee would not receive college-credit.
- Standalone program at PSU so likely couldn't be replicated at other institutions of higher education.

## **4. PATHWAY: SCALE UP EXISTING TRAININGS**

### **CONCEPT**

As outlined above, there are several organizations that offer on-demand trainings in fundamentals of homeless services, which may be a quick pathway to ensuring providers have what they need now as we consider additional options.

To ensure that our efforts are not duplicative:

- Identify the current trainings that are occurring locally that match provider needs.
- Coordinate, leverage, and invest in these trainings, to make them more readily accessible to frontline-service workers.

Trainings in this pathway are inclusive of the variety of trainings that are available to frontline-service workers, including skills like CPR but also training in trauma-informed care.

### **IMPLEMENTATION**

- Conduct a landscape analysis of the current trainings available in the region.
- Compare/contrast what is currently available against provider need.
- Engage in efforts to increase the accessibility of these trainings.

### **BENEFITS**

- Fastest option

### **DETRIMENTS**

- Possibility of needed trainings not being available.
- Not as wholistic for the employee.
- Virtual only
- On-demand makes it challenging for connecting with an instructor

### **AREAS FOR FURTHER RESEARCH**

As outlined above, this is just the first section of this paper with a scan of higher education options. Moving forward, we are planning to conduct the following, additional research:

- Workforce boards

- Apprenticeship programs
- Adding to existing peer support specialist training

## **Conclusion**

The above paper outlines our research into pathways for a potential housing service worker certification program. Through our research, we have learned that in the post-secondary education field, no direct facsimile exists to the theoretical course descriptions we have developed. That said, there are potential pathways that could be pursued by scaling up existing trainings, expanding on current coursework or developing a new, non-credit training certificate program that could support this work. Our research will continue to identify other potential pathways.

DRAFT

# APPENDIX

---

## APPENDIX A

### HIGHER EDUCATION ENGAGEMENT SUMMARY: 4 – YEAR UNIVERSITIES

#### INSTITUTION 1: PORTLAND STATE UNIVERSITY

##### PSU MEETING #1: JULY 24TH, 2024

###### ATTENDEES

- Cole Merkel: Regional Capacity Team (RCT) Manager
- Justin Barrieault: RCT Training Program Manager
- Jacen Greene: Assistant Director – Homelessness Research Action Collaborative

###### KEY POINTS

- PSU's Center for Executive and Professional Education (CEPE)
- CEPE develops tailored courses for organizations to help them train their staff.
- CEPE could develop a curriculum for HSWC.
- Discussed the possible use of micro-credentials, the development of curricula for HSWC, and pathways to creation of certification programs.
- CEPE would be able to assist in the expanding of training pathways to include both new and current employees, with a focus on culturally specific services and equity in recruitment.
- Also discussed: the potential for creating a flexible, responsive program that accommodates diverse learning styles and provides practical metrics for proficiency.

###### CONTRIBUTIONS

- Informed RCT HSWC staff of the possibility of partnering with CEPE for curriculum development/implementation.
- Introduced the idea of utilizing micro-credentials for HSWC implementation.
- Resulted in research to discover other organizations that offer similar services to CEPE's scope of work.
- Resulted in a warm referral to CEPE's director, Nicole Sisco.

##### PSU MEETING #2: AUGUST 12TH, 2024

###### ATTENDEES

- Cole Merkel: Regional Capacity Team Manager
- Justin Barrieault: RCT Training Manager
- Nicole Sisco: CEPE Director
- Sara Oltman: Custom Education Manager – CEPE
- Masumi Lint: Assistant Director of Programs – CEPE

### **KEY POINTS**

- Overview of PSU’s Center for Executive and Professional Education (CEPE)
- Offers 16 different certificate programs, offering non-credit courses that cater to market demand.
- Programs are shorter and more-flexible than for-credit courses.
- Involve faculty from across PSU.
- Focuses on practical, immediate application rather than theoretical knowledge.
- CEPE services
- Can create customized, on-demand programs, including mentorship and capstones.
- Provides certificate of completion and badges for skill attainment.
- Handles all aspects of program development, from marketing to advising, while exploring how to structure costs and revenue for partnerships.

### **CONTRIBUTIONS**

- Provided RCT HSWC staff with knowledge of the implementation process through CEPE, including timeframes and cost structures.
- Informed the possibility of using licensing or badging for certificate implementation.

### **PSU MEETING #3: AUGUST 13TH, 2024**

#### **ATTENDEES**

- Justin Barrieault: RCT Training Manager
- Lisa Hawash: MSW Program Director

#### **KEY POINTS**

- HSWC Curriculum
- Discussed the possibility of making each HSWC focus area its own curriculum/Non-credit Training Certificate (NCTC).
- If that is the case, Lisa suggested that a foundation course (Fundamentals of Housing Service Work) be recommended before advancing to more specialized courses.
- Fundamentals of Housing Service Work



- Content to include local responses to the homelessness crisis and could be adapted by different community colleges in various regions.
- Lisa suggested implementing a pilot program after the creation of an HWSC curriculum.
- Suggested course length: 30-40 hours.
- Lisa estimated that it would take 40-50 hours for curriculum development.

#### **CONTRIBUTIONS**

- Stressed the importance of having a fundamentals course that is pre-requisite to any other topic area specific courses that are developed/implemented.
- Informed the length of the fundamentals course, the timeframe to development, and the methodology to implement the competency achievement model utilized in social work settings.
- Introduced the ideas of beginning with a pilot project and implementing geographic-specific information into the course.

#### **PSU MEETING #4: AUGUST 19TH, 2024**

#### **ATTENDEES**

- Justin Barrieault: RCT Training Manager
- Aimee Shattuck: Executive Director – Student Activities and Leadership Program

#### **KEY POINTS**

- MSW Competency Model
- In the MSW program, a competency model is used to assess intern performance, including a rubric with a 1–5-point scale for each learning outcome, with self-assessments conducted at intervals with a field supervisor.
- This model has potential portability to HSWC, allowing long-time staff to demonstrate their sufficient understanding of the course material.

#### **CONTRIBUTIONS**

- Informed the process to hire an MSW intern.
- Provided more information on the social work competency achievement model.

#### **LOCAL COMMUNITY COLLEGES**

#### **INSTITUTION 1: PORTLAND COMMUNITY COLLEGE (PCC)**

#### **PCC MEETING #1: JULY 25TH, 2024**

#### **ATTENDEES:**

- Cole Merkel: Regional Capacity Team Manager
- Justin Barrieault: RCT Training Program Manager
- Pam Hester: Program Dean – Community Workforce Development
- Charles Clay: Center Manager – Metro Opportunity Center
- Mel Diyarza: Employment Specialist – Metro Opportunity Center

## **KEY POINTS**

- Landscape Analysis
- The discussion focused on ensuring there is sufficient demand for trained staff, highlighting the need for both volume and employer interest to make the program viable.
- It was suggested to research existing programs to identify gaps and create a path for new training if necessary.
- Stressed the importance of creating a non-duplicative, goal-oriented certification program.
- PCC Courses
- Family Services associate degree.
- Human Services Career Pathway Certificate.

## **CONTRIBUTIONS**

- Introduced the “train the trainer” model for HSWC implementation.
- Further informed the possibility of partnering with Work Systems and receiving federal funding through the Workforce Innovation and Opportunity Act (WIOA).

## **PCC MEETING #2: AUGUST 8TH, 2024**

### **ATTENDEES**

- Cole Merkel: Regional Capacity Team Manager
- Justin Barrieault: RCT Training Manager
- Windy Wahlke: Director of Professional Development and Training
- Erika Huffman: Program Coordinator

### **KEY POINTS**

- Services: PCC Professional Development and Training Department
- Specialized courses in:
  - Microsoft 365,
  - Leadership,

- Project management, and
- Team building.
- Customized training programs tailored to specific departmental/organizational needs.

### **CONTRIBUTIONS**

- The consideration of a statewide collaboration to create recognized HSWC NCTC and integrate micro credentials with existing programs.
- Currently does not exist.
- Every NCTC program is unique to the institution of higher education that it is paired with.
- Windy seemed excited about partnering with Metro on this project.

### **INSTITUTION 2: MOUNT HOOD COMMUNITY COLLEGE (MHCC)**

#### **MEETING #1: JULY 31ST, 2024**

#### **ATTENDEES**

- Cole Merkel: Regional Capacity Team Manager
- Justin Barrieault: RCT Training Program Manager
- Finnegan Budd: RCT Program Assistant
- Aaron Sorenson: Business & Industry Workforce Training Coordinator

#### **KEY POINTS**

- MHCC Business and Industry Workforce Training Department
- Offers various training options, including:
  - creating custom curriculums,
  - providing packaged classes,
  - Non-credit Training Certificates (NCTC):
- Training programs must adhere to state requirements, including a minimum of 18 hours and a maximum of 210 hours, and need to be tied to a specific profession with a Career Instructional Program (CIP) code.
- Career and Technical Education (CTE) programs.
- Often funded through open enrollment with fees linked to workforce development.
- Program approval and funding often involve Work Source and Workforce Investment Innovation Act (WIIA) funds, which support getting individuals into permanent positions.

- Business Industry Training System (BITS) Meetings
- A collaborative space involving monthly meetings with other community colleges to discuss best practices and new non-credit training certificates.

## **CONTRIBUTIONS**

- Further informed RCT HSWC staff of the NCTC HSWC implementation option, as well as the possibility of utilizing CTE's.

## **INSTITUTION 3: HIGHER EDUCATION COORDINATION COMMITTEE (HECC)**

### **MEETING #1: AUGUST 14TH, 2024**

#### **ATTENDEES**

- Cole Merkel: Regional Capacity Team Manager
- Justin Barrieault: RCT Training Manager
- Melia Deters: RCT Program Coordinator
- KC Andrew: Education Specialist

#### **KEY POINTS**

- Non-credit Training Certificate Programs (NCTC)
- NCTCs are transcript certificates that provide students with credentials that can be applied toward traditional academic degrees through a "credit for prior learning" process.
- KC expressed frustration that each college must develop its own NCTC, leading to inefficiencies and a lack of shared resources.
- NCTCs typically require 18-210 hours of training with measurable outcomes related to job skills.
- They are often aimed at incumbent workers but can be adapted for newcomers in career and technical education (CTE) programs.
- KC mentioned that internships and seminars could be integrated into NCTC programs but emphasized that such models need careful planning, including instructor involvement and preceptor supervision.

## **CONTRIBUTIONS**

- Informed RCT HSWC staff of the fact that NCTC's are unique to each community college. There is no model for a regional/state-wide NCTC program.
- NCTC's can be applied toward traditional academic degrees.
- CTE's can serve individuals not already in the field; NCTC's serve incumbent workers.

- Including an internship in the NCTC/CTE would be very difficult, with cohorts specific to individual employers.

#### **INSTITUTION #4: WORKSYSTEMS AND CLACKAMAS WORKFORCE PARTNERSHIP**

##### **MEETING #1: AUGUST 16TH, 2024**

##### **ATTENDEES**

- Cole Merkel: Regional Capacity Team Manager
- Melia Deters: RCT Program Coordinator
- Bridget Dazey, Executive Director, Clackamas Workforce Partnership
- Andrew McGough: Executive Director, Worksystems Inc.
- Patrick Gihring: Chief Program Officer, Worksystems Inc.

##### **KEY POINTS**

- Met with the local workforce development boards to seek their opinion of the project as a concept.
- Workforce boards agree that a housing service worker certification would be beneficial and would be a long-term need for the community.
- Andrew, Patrick and Bridget expressed concerns about low wages in the homeless services field and cited it as the major obstacle to overcome in building a stronger workforce—and that both should be connected.
- Worksystems and a Multnomah County shelter consortium created a Shelter Worker training. The training is not in use currently. Cited that one of the primary challenges to attracting new workers to entry-level shelter jobs in Multnomah County is low pay.
- The workforce boards recommended the following:
- A funders table be convened to work on the wage issue would be important—and to include the workforce boards in that conversation.
- Exploring if the existing career coaching network might be a delivery mechanism for this project.

##### **CONTRIBUTIONS**

- Informed RCT that workforce boards can certify industry credentials.
- Eligible Training Provider List (ETPL) approved training programs can qualify for federal funding.

##### **NATIONAL COMMUNITY COLLEGES**

## **INSTITUTION 1: SANTA MONICA COLLEGE (SMC)**

### **MEETING #1: JULY 26TH, 2024**

#### **ATTENDEES**

- Cole Merkel: Regional Capacity Team Manager
- Justin Barrieault: RCT Training Program Manager
- Ash Elverfeld: RCT Program Coordinator
- Patricia Ramos: Dean – Academic Affairs
- Steven Sedky: Associate Dean – Career Education

#### **KEY POINTS**

- SMC Homeless Service Worker Certification
- Aims to address the shortage of trained frontline workers for the homeless population. Aims to address sector turnover and low wages by providing targeted training and support.
- Funded through a contract with Los Angeles Homeless Services Authority (LAHSA), is modeled after an Amazon.com initiative and is designed to create a pipeline of skilled workers.
- It includes a Certificate of Achievement and offers elective credit toward other degrees.
- The inaugural class has 27 students, including some with lived experience of homelessness.
- The total cost for one cohort is \$750k, covering various expenses including instructor fees and equipment.
- Curriculum development did not include provider feedback.

#### **CONTRIBUTIONS**

- Informed RCT HSWC staff of similar efforts being performed in this scope of work and elaborated on one possible implementation strategy.
- Emphasized the importance of receiving provider feedback to create buy-in and a program that is responsive to the needs in the Portland-metro area.

## **INSTITUTION 2: SAN DIEGO CITY COLLEGE (SDCC)**

### **MEETING #1: AUGUST 2ND, 2024**

#### **ATTENDEES**

- Cole Merkel: Regional Capacity Team Manager

- Justin Barrieault: RCT Training Program Manager
- Ash Elverfeld: RCT Program Coordinator
- Jennifer Cosio: Assistant Program Coordinator/Adjunct Faculty
- Kirin Macapugay: Program Director - Program for Engaged Educational Resources (PEER)

### **KEY POINTS**

- Program for Engaged Educational Resources (PEER)
- San Diego City College has developed a unique program focused on homelessness, the first of its kind at a community college.
- This program addresses the high turnover rates in social services by providing training specifically tailored for those with lived experience and those entering the field.
- It includes courses on trauma-informed care and motivational interviewing, as well as practical elements like job coaching, mock interviews, and resume assistance.
- The curriculum is designed in partnership with local organizations, including the San Diego Housing Commission and the Regional Task Force on Homelessness, incorporating guest speakers and real-world insights.
- The program requires a 40-hour volunteer commitment per semester and has successfully helped nearly 100 students secure jobs since its inception in 2021.
- The focus is on understanding the impact of policies and laws on frontline work, with an emphasis on realistic training and support for both new and experienced workers.

### **CONTRIBUTIONS**

- Informed RCT HSWC staff of similar efforts being performed in this scope of work and elaborated on one possible implementation strategy.
- Resulted in a meeting with the San Diego Housing Commission and the Los Angeles Homeless Services Authority (LAHSA).

### **ADDITIONAL ENGAGEMENT**

The below additional institutions of higher education were also contacted by RCT staff. Takeaways from these meetings were minimal, and a quick summary of the key points from these meetings can be found below:

- Azuza Pacific University
- Warner Pacific University

- NAEH
- Clackamas Workforce Partnership
- Clackamas Community College
- University of Portland
- George Fox University
- Pacific University

DRAFT



# REFERENCE

---

- Addictions Counselor, n.d. Oregon Education Requirements & Certification for Substance Abuse Counselors. <https://addiction-counselor.org/how-to-become/oregon/>
- Boise State University. (2024, February). Certificate vs. associate degree: What is the difference? <https://www.boisestate.edu/online/2024/02/15/certificate-vs-associate-degree-what-is-the-difference/>
- Clackamas Community College, n.d. Alcohol and Drug Counselor Career Pathway Certificate: Investing in your Future. <https://www.clackamas.edu/academics/degrees-certificates/alcohol-and-drug-counselor-career-pathway>
- Clackamas Community College, n.d. Human Services Generalist: Investing in Your Future. <https://www.clackamas.edu/academics/degrees-certificates/human-services-generalist-certificate>
- Higher Education Coordinating Commission, n.d. *Community College Program Approval*. <https://www.oregon.gov/highered/about/community-colleges-workforce-development/pages/community-college-program-approval.aspx>
- MHACBO, n.d. About. <https://www.mhacbo.org/en/contact-us/about/>
- Mt. Hood Community College, n.d. Cost of Attendance. <https://mhcc.edu/tuition-admission/tuition/cost-of-attendance>
- OPTIC: Oregon Peer Training & Innovations Center, n.d. Nationally Accredited Peer Wellness Specialist Accredited Training. <https://www.mhaoforegon.org/s/PWS-General-info-flyer.pdf>
- Oregon Health Authority, n.d. About Traditional Health Workers. <https://www.oregon.gov/oha/ei/pages/about-traditional-health-workers.aspx>
- Oregon Health Authority, n.d. About Traditional Health Workers. <https://www.oregon.gov/oha/ei/pages/about-traditional-health-workers.aspx>
- Oregon Home Care Commission, n.d. Career Lattice: Traditional Healthcare Worker. <https://ohccworkforce.org/career-lattice/page-2/traditional-health-worker/>
- Outpatient Behavioral Health Services, Division 19. Oregon Health Authority. 309-019-0125, Specific Staff Qualifications and Competencies. (2023). <https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=301126>
- Portland Community College, n.d. Continuing Education Units (CEU). <https://catalog.pcc.edu/handbook/c101-continuingeducationunits/>

Portland Community College, n.d. Tuition and Fees. <https://www.pcc.edu/enroll/paying-for-college/tuition/>

Traditional Health Workers, Division 60. Oregon Health Authority. Equity and Inclusion Division, Chapter 950. (2023).  
<https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=7798>

Trillium Community Health Plan. (2023, March). Steps to Becoming a Certified Personal Health Navigator.  
<https://www.trilliumohp.com/content/dam/centene/trillium/ProviderResources/ProviderForms/MCA%20051223%20Steps%20CPH%20Navigator.pdf>

University of Portland, n.d. Social Work, BA.  
<https://college.up.edu/socialwork/undergraduate-programs/social-work-ba.html>

Yamhill Community Care, n.d. Traditional Health Workers.  
<https://yamhillcco.org/community-programs/traditional-health-workers/>

METRO SUPPORTIVE HOUSING SERVICES TRI-COUNTY PLANNING BODY

Monthly progress report | November 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\*

| <b>Goal</b>                          | <b>Progress</b>  |
|--------------------------------------|--|
| <i>Regional Landlord Recruitment</i> | <i>Metro and county staff are continuing to coordinate on the implementation of strategies in the Regional Landlord Recruitment Regional Implementation Plan adopted by the TCPB, including meeting monthly in the Regional Landlord Recruitment Workgroup. Metro staff are working to create a webpage on Metro’s website with information on county landlord financial incentives, as part of Plan’s Strategy #1: Communication and education plan,</i>  |
| <i>Coordinated Entry</i>             | <i>The CE Regional Implementation Plan (CERIP) was approved by the TCPB on 10/9/24 and by Supportive Housing Services Oversight Committee (SHSOC) on 10/28/24. Work on the four strategies outlined in the CERIP (Regionalize visibility of participant data, align assessment questions, Regionalize approaches to prioritization for racial equity, Regionalize approach to case conferencing) has begun.</i>  |
| <i>Healthcare system alignment</i>   | <i>The regional planning workgroup with Health Share, Counties, and Metro, with support from Homebase is currently drafting the implementation plan with a focus on regional opportunities to support, supplement, and advance existing health and housing system alignment initiatives. The implementation plan is scheduled to come to TCPB in January 2025. The team will provide an update to the SHS OC in January and present the plan for OC approval in February. A data sharing workgroup continues to meet, learning from existing data sharing agreements (DSAs) across the region to discuss regional data sharing infrastructure and scope for the regional plan.</i> |

*Training + Technical Assistance*

*The Regional Capacity Team is continuing to develop the framework for a training or certification for frontline housing and homeless service providers. This packet includes a research paper that outlines opportunities in post-secondary education and other existing certifications, like peer support. The team is now doing research on other potential opportunities, including workforce boards.*

*The team is also moving forward on developing a technical assistance demonstration project that aims to pair PSH providers with consultants to benchmark their service delivery to national best practices and measure the impact of technical assistance interventions.*

*Since provider feedback and buy in is core to the success of both of these projects, the team is conducting outreach to frontline service providers through county meetings and coalitions. We appreciate the counties for making space for us at their check ins with their contracted providers.*

*Employee Recruitment and Retention*

*We are meeting monthly with a tri-county workgroup to draft a regional plan, exploring concepts discussed in the June/July progress updates and opportunities to build on existing efforts in counties toward regional approaches. The Regional Implementation Plan is 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. In particular, we are tracking the recommendations of the state's Modernizing Grant Funding and Contracting Task Force, chaired by Mercedes Elizalde.*

*\*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: September 23, 2024  
Time: 9:30 a.m. to 12:00 p.m.  
Place: Virtual meeting (Zoom)  
Purpose: Metro tax collection and disbursement update; Multnomah County Corrective Action Plan (CAP) update, Tri-County Planning Body (TCPB) update; FY24 Q4 financials presentation and discussion, County FY25 final work plans and budgets presentation and discussion

---

### Member attendees

Co-Chair Dr. Mandrill Taylor (he/him), Co-chair Mike Savara (he/him), Jim Bane (he/him), Mitch Chilcott (he/him), Carter MacNichol (he/him), Jeremiah Rigsby (he/him), Peter Rosenblatt (he/him), Kai Laing (he/him)

### Absent members

Dan Fowler (he/him), Cara Hash (she/her), Margarita Solis Ruiz (she/her), Felicita Montebalanco (she/her), Jenny Lee (she/her)

### Elected delegates

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), Washington County Chair Kathryn Harrington (she/her),

### Metro

Yesenia Delgado (she/her), Breanna Hudson (she/her), Yvette Perez-Chavez (she/her), Liam Frost (he/him), Abby Ahern (she/her)

### Kearns & West Facilitator

Ben Duncan (he/him)

### Welcome and Introductions

Co-chairs Dr. Mandrill Taylor and Mike Savara provided opening remarks and reflected on the importance of appreciating progress and storytelling.

Ben Duncan, Kearns & West, reviewed the meeting agenda and purpose and facilitated introductions between Committee members.

Yesenia Delgado, Metro, introduced Kai Liang, the Committee's newest member.

Kai Liang introduced himself as the Director of Housing Development at Self Enhancement, Inc. (SEI) and shared an overview of his background and experience.

Abby Ahern, Metro, shared a quarterly update from the Tri-County Planning Body (TCPB). She highlighted that the Committee would receive the Coordination Entry Regional Implementation Plan for approval next quarter and an update on the Employee Recruitment and Retention Goal in December.

## Supportive Housing Services Oversight Committee Meeting Summary

Committee members had the following questions and comments:

- **Question:** Who gives updates to the TCPB from the Committee?
  - **Metro response:** Yesenia Delgado.

The Committee had a quorum and approved the August Meeting Summary.

### Conflict of Interest Declaration

Peter Rosenblatt declared that he works at Northwest Housing Alternatives, which receives SHS funding.

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

### Public Comment

Tiffany Graven provided public comment. She asked if there was capacity to add a position on the Committee for someone with lived experience and how the public could get more involved outside of giving public comment.

Metro staff linked [the application](#) to be a Committee member in the chat, encouraged those with lived experience to apply, and asked those with questions or access needs to email [housingservices@oregonmetro.gov](mailto:housingservices@oregonmetro.gov).

### Update: Metro Tax Collection and Disbursement

Josh Harwood, Metro, shared that the tax collection is about \$11 million as of August. He stated that Metro will complete a forecast in November and can share more information then.

Committee members had the following questions and comments:

- **Question:** Are economic assumptions being factored into the forecast?
  - **Metro response:** Yes, the forecast includes economic thinking, and Metro will run the model next month.

### Discussion: Multnomah County Corrective Action Plan

Yesenia Delgado, Metro, shared that Multnomah County was previously placed on a Corrective Action Plan (CAP) and has now met all spending requirements and programmatic outcomes. She noted that most goals were met.

Dan Field, Multnomah County, reflected on the success of the County and appreciated the time in the Committee's meetings to talk through strategic items.

Committee members had the following questions and comments:

- **Question:** I appreciate the work between Metro and Multnomah County on this. Can you share any reflections and learnings on the goals that were not met and any reflections as you look forward to the future?
  - **Multnomah County response:** That speaks to the intensity of the timing, not the quality of our programs and partners. There was a ramp-up period in a short amount of time, and some providers were not able to do that. However, we were

## Supportive Housing Services Oversight Committee Meeting Summary

able to shift and deliver funding to other providers that were able to ramp up quickly.

- **Question:** Do you feel that you have achieved financial stabilization and understanding of cash flow?
  - **Multnomah County response:** Predictability from Metro is critical, extra funds are disruptive with providers. It would be great to move to a two-year funding cycle, but we are now on a steady funding track.
- **Question:** Can you comment on the movement of some money to day centers?
  - **Multnomah County response:** The City of Portland revised its time, place, manner ordinance, the County took a look at where impacts could be felt, such as libraries seeing a different amount of visitors. The County analyzed these potential impacts and responded by increasing day center funding to build a safety net for those that would be impacted.

Yesenia closed this agenda item by sharing there is no guidance in the CAP on how to document completion of the CAP, so Metro will be completing a memo that documents progress and learnings.

### Discussion: FY Q4 Financials

Rachael Lembo, Metro, shared that program spending has grown significantly over the past three years and spending is just below \$300 million. She reviewed Clackamas County, Multnomah County, and Washington County's spend-down plans versus actuals, their growth, and expenditure to tax revenue comparisons.

Committee members had the following questions and comments:

- **Question:** For the graph that showed the financial spending budget by county, were there any program areas where spending exceeded or was short of expectations? If so, why?
  - **Metro response:** There were areas that were short of expectations, but nothing alarming as the counties communicated that they were ramping things up. For the items that were exceeded, Metro expects a response from the counties soon.
- **Question:** Will Population A and B breakdowns be in the Annual Reports?
  - **Metro response:** Yes.

### Presentation: FY25 Final Work Plans and Budgets

Breanna Flores, Kanoe Egleston, and Antoinette Payne, Multnomah County, introduced themselves and presented an overview of the County's FY 2024-2025 Budget and Work Plan. They noted there was \$275.1 million in the budget, with an additional \$33.3 million in reserves. They detailed the amounts allocated to specific programs including Permanent Supportive Housing (PSH), Rapid Re-housing (RRH), and eviction prevention. They then reviewed the budget versus actual carryover, noting that there are \$35 million less carryover funds available in FY2025. They shared that work plan highlights include investments in culturally specific and responsive services and new and expanded programming.

Committee members had the following questions and comments:

- **Question:** How is the \$35 million gap being addressed?
  - **Multnomah County response:** We are working with our Board and can report back out in the coming weeks. This is a timing issue as the County adopts the budget in May but does not know year-end spending until August.

## Supportive Housing Services Oversight Committee Meeting Summary

- **Question:** The County fell short of its eviction prevention target while the budget allocation is 25%, what are the barriers and why was the allocation 25%?
  - **Multnomah County response:** This relates to different funding streams used in the County, there is a significant amount of work that is occurring, but it is not SHS funded, our Q4 report showed the American Rescue Plan Act (ARPA) funds. SHS funds for eviction prevention were to support full-time employees within culturally specific organizations, and most of the rent assistance was ARPA funds. We can work with Metro on how to better show the multiple funding streams story in reports.
- **Question:** The Regional Long-term Rent Assistance (RLRA) seems low compared to Washington County. RLRA is one of the most powerful tools, what is the constraint in holding back RLRA?
  - **Multnomah County response:** RLRA is one tool in the toolbox, and the County was leveraging existing resources and vouchers while ramping up RLRA to support the most vulnerable.
- **Comment:** It would be helpful to have a graphic of the dashboard or narrative. Switching funding streams is important and it would be helpful for all the jurisdictions to be able to speak to what pieces of the work SHS is filling.
- **Question:** Can you speak more about the different parts of the system such as RLRA interventions compared to shelters and how decisions are made at a high level between investing in a new shelter versus a new voucher? I am seeing a trend of sheltering as a solution for managing encampments following the Supreme Court Decision which is concerning.
  - **Multnomah County response:** Metro and the Committee are in a unique regional position that can drive the strategy and balance between expenditures and regional long-term planning. Currently, these decisions are made by the County Commission and Chair to meet the needs of constituents and balance long-term planning.

Lauren Decker and Cody Thompson, Clackamas County, introduced themselves and presented an overview of Clackamas County's FY2024-2025 Budget and Work Plan. They shared there was a \$172.37 million budget and detailed the allocations towards programs including PSH, RRH, and eviction prevention. They shared that the anticipated rollover from FY2024-2025 is slightly over \$50 million and shared the allocations of the carry-over towards programs. They highlighted that the budget is 100% committed. They shared work plan highlights including Native American family programming, new infrastructure, and a resource navigation program.

Committee members had the following questions and comments:

- **Question:** Have there been any challenges in reaching at-risk populations and what are strategies for reaching them?
  - **Clackamas County response:** Our infrastructure projects are recovery-oriented and have dedicated staff trained for higher-need populations. In our new resource navigation program, we are seeing folks take time to sit down and connect to resources.
- **Question:** Can you explain the 23% discrepancy between the spend down and committed budgets?
  - **Clackamas County response:** The 77% is our minimum spending target, our budget sets aside carry-over funds for future years to sustain programs for multiple fiscal years.

## Supportive Housing Services Oversight Committee Meeting Summary

Jes Larson, Washington County, introduced herself and presented an overview of Washington County's FY2024-2025 Budget and Work Plan. She presented an overview of the County's FY2024-2025 Work Plan goals including an 85% housing retention rate for PSH and RRH participants, 400 shelter units, and 20 outreach workers. She shared that the County's budget is \$115 million and shared the percentage allocations for programs including PSH and RRH. She noted that the spend-down plan is 95% and that the carryover balance of \$7 million is overcommitted due to lower than forecasted revenue.

Committee members had the following questions and comments:

- **Question:** Congratulations on exceeding your eviction prevention goals. Can you share key successes and challenges from the RLRA program?
  - **Washington County response:** The County had been building up capacity in the past and now we are maximizing resources. The idea is to move people through different levels of services as RLRA is a rent assistance tool.
- **Question:** Why is eviction prevention a one-year project?
  - **Clackamas County response:** It's not a priority tool for Populations A and B, where other tactics like RRH are more valuable. Eviction prevention is critical but not the primary priority for SHS populations.
- **Comment:** The RLRA-only model worked well in my experience. A few folks were able to only need rent assistance, but it is critical to stay flexible if that changes and provide wrap-around services quickly.

Ben reflected that SHS funds not being able to meet all the housing needs in the region has been a recurring challenge for the Committee.

### Next Steps

The Co-chairs asked for further Committee conversation and strategy for ensuring that the Committee has oversight and can ensure the counties are working towards the goals in the local implementation plans (LIP) and for a data-driven system.

Yesenia thanked the counties for presenting and reflected that template improvements would help inform how investments are being tracked. She shared that Metro would work with the co-chairs to plan out the requested conversation.

The Co-chairs provided closing remarks and thanked everyone for their participation.

Carter asked for an update on the Metro Council SHS Regional Oversight process and decision, and how that would impact this Committee.

Yesenia replied that there are no final decisions and can send some additional information over email.

Jeremiah asked for a public opinion and comms update and how messages are currently resonating with the public.

Ben replied that Israel could attend the next meeting.

Next steps include:

- The Committee to discuss oversight of LIP progress.
- The Committee to receive updates on the Metro Council Regional Oversight process.
- The Committee to receive updates on public opinion and communications.



## Supportive Housing Services Oversight Committee Meeting Summary

- The Committee to meet on October 28, 9:30am-12:00pm.

### **Adjourn**

The meeting adjourned at 12:00 pm.

# 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



**Table of Contents:**

Proposal Summary ..... 4

Strategy #1: Regionalize Visibility of Participant Data ..... 11

Strategy #2: Align Assessment Questions ..... 13

Strategy #3: Regionalize Approaches to Prioritization for Racial Equity ..... 16

Strategy #4: Regionalize an Approach to Case Conferencing ..... 20

Appendix: RELT Analysis Notes ..... 23

## 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 9<sup>th</sup>, 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 9<sup>th</sup>. 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 \$1.2 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          |
| <b>Total</b>                             | <b>\$1,195,000</b> |



## 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><b>INTERIM BENCHMARK: This list of proposed changes will be prepared by <i>October 2025</i>.</b></p> | <ol style="list-style-type: none"> <li>1. Confirm current data visibility capabilities between counties and create initial draft "wish list" for proposed changes to cross-county data visibility.</li> <li>2. Discuss draft changes with HMIS Control/Governance Board.</li> <li>3. Collect and incorporate feedback from providers and people with lived experience regarding desired changes to visibility.</li> <li>4. Run proposed changes to data</li> </ol> | 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"> <li>a. Work with County Counsel to identify necessary changes to county privacy notices and ROI's.</li> </ul> <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"> <li>1. Make changes in county HMIS systems, including changes to ROI's and privacy notices, to reflect increased visibility between counties.</li> <li>2. Train frontline staff on changes to visibility in HMIS.</li> </ul>   | 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.

|   |
|---|
| <b>Budget</b>   |
| 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            |
| <b>Total: \$200,000</b>   |

**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"><li>1. Share most recent assessment questions and response options</li><li>2. Map assessment questions using the most recent versions of assessments for each community</li><li>3. Identify questions that are identical or similar enough across county lines that counties can share responses for coordinated entry participants seeking housing in multiple counties</li><li>4. Decide whether to conduct unique</li></ol> | Contracted consultant (Metro), county staff (Coordinated Entry leads) |

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

|   |
|---|
| <b>Budget</b>   |
| 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 |
| <b>Total: \$50,000</b>  |

## 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.

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

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



| Phase | Deliverables  | Details/Steps   | Responsible Party   |
|-------|---|---|---|
| 4     | <ul style="list-style-type: none"> <li>Completed pilot impact evaluation</li> </ul>                 | <ol style="list-style-type: none"> <li>Pilot new prioritization factors (including any new assessment questions) and re-evaluate after 6 months</li> </ol>  | County staff (Coordinated Entry leads), contracted consultant (Metro) |
| 5     | <ul style="list-style-type: none"> <li>Updated prioritization policy adopted by counties</li> </ul> | <ol style="list-style-type: none"> <li>Draft changes to counties' prioritization policies based on results of pilot</li> <li>Review and approval of these policies by coordinated entry partners</li> </ol> | 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   |
| <b>Total: 200,000</b>   |

**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 purpose for case conferencing, co-created by the three counties, and approved by coordinated entry partners and other interested parties in each county.</p> <p><b>INTERIM BENCHMARK: Statement of shared purpose approved by June 2025.</b></p> | <ol style="list-style-type: none"> <li>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.</li> <li>2. National scan of case conferencing best practices.</li> <li>3. In-person tri-county case conferencing design meeting(s), including representatives from provider organizations, to</li> </ol> | <p>Contracted consultant (Metro), county staff (Coordinated Entry leads)</p> |

| 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"> <li>4. Finalizing statement of shared purpose.</li> <li>5. Obtaining approval of statement of shared purpose from Coordinated Entry partners in each county.</li> <li>6. Conduct RELT analysis on statement of shared purpose for case conferencing</li> </ol>           |  |
| 2     | Identifying and implementing strategies to automate key case conferencing functions, and improve meeting attendance. | <ol style="list-style-type: none"> <li>1. Identify strategies to automate case conferencing functions and improve meeting attendance.</li> <li>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)</li> <li>3. Implement strategies to automate case conferencing functions.</li> <li>4. As needed, train frontline staff on changes.</li> </ol> | 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 |
| <b>Total: \$745,000</b>   |

## 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.<br><br>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.

The following materials were received  
during the meeting.

16:02:30 From Monta Knudson to Everyone:  
Currently in Nicaragua, Internet today is hit and miss so I might need to switch to phone if needed.

16:15:55 From Monta Knudson to Everyone:  
Thank you, furniture is so important for our friends in need.

16:16:03 From Community Warehouse to Hosts and panelists:  
Thank you Monta!

16:16:34 From Cameran Murrphy to Everyone:  
Agreed, thank you Anna. As a service provider in WashCo, I see first hand the benefits of the contract you have in WashCo

16:17:34 From Mike Garcia, He/Him, Oregon Metro to Everyone:  
From Community Warehouse to all panelists 04:16 PM  
Thank you Monta!

16:18:46 From Steve Rudman to Everyone:  
I also agree. I hope we can request a regional /three county request for furniture warehouse formally at this meeting

16:27:56 From Monta Knudson to Everyone:  
100% agree! And fantastic work in the background on this.

16:29:21 From Nicole Larson to Hosts and panelists:  
As a former case manager I also agree that this is such a valuable service. I would love to have a process for utilizing the rif when a proposal such as this comes to us.

16:29:56 From Mike Garcia, He/Him, Oregon Metro to Everyone:  
Reminder to please make sure chat settings are set to Everyone. Thank you!

16:30:04 From Mike Garcia, He/Him, Oregon Metro to Everyone:  
From Nicole Larson to all panelists 04:29 PM  
As a former case manager I also agree that this is such a valuable service. I would love to have a process for utilizing the rif when a proposal such as this comes to us.

16:31:46 From Mercedes Elizalde to Everyone:  
Cameron, I would make your question a directive - you are telling the Metro/County crew that we expect them to work from lessons learned in WashCo and I think that is rightly so

16:32:27 From Cameran Murrphy to Everyone:  
Thank you Mercedes, appreciate the guidance for how to show up as a member

16:34:21 From Kathryn Harrington to Everyone:  
And I just popped some Tylenol to help get a smile back on my face! KH

16:35:04 From Eboni Brown to Everyone:  
My organization receives SHS funds

16:35:34 From zoi She/Her/Ella to Everyone:  
Community Action receives SHS funding as well

16:37:07 From Liam Frost to Hosts and panelists:  
I want to acknowledge the request for an additional proposal for reviewing community warehouse request specifically. This is a new request, and want to make sure that we will make every effort to meet that request. Whether we can, will depend on staff's capacity at Metro and at the counties. But again, we will make every effort to do so.

16:38:29 From Mike Garcia, He/Him, Oregon Metro to Everyone:  
From Liam Frost to all panelists 04:37 PM  
I want to acknowledge the request for an additional proposal for reviewing community warehouse request specifically. This is a new request, and want to make sure that we will make every effort to meet that request. Whether we can, will depend on staff's capacity at Metro and at the counties. But again, we will make every effort to do so.

16:54:04 From Ben Duncan (Kearns & West) to Everyone:  
if there are any county updates, please place in chat for tonight's purpose. thanks!

16:57:44 From Cameran Murrphy to Everyone:  
I do want to put on record that part of the ballot measure conversations need to take into consideration and take care not to conflate the multiple distincy questions into one measure this time around - should the SHS bond sunset in 2030? should the SHS funding expand allowable uses? should the tax structure change? - voters will want to yes/no the individual questions going into this possible measure

17:04:47 From Nicole Stingh (she/her), Washington County to Everyone:



The JOHS provider conference is so cool!

17:27:58 From Mercedes Elizalde to Everyone:

I would love to hear some provider voice here, especially from the orgs that have been through the state work to know what ongoing work is helpful and what alignment is necessary

17:28:52 From Mercedes Elizalde to Everyone:

I also think the property management and owner is important in the retention conversation, ultimately it is not the PSH provider who decided to evict someone

17:30:24 From Mercedes Elizalde to Everyone:

How much will providers be paid to participate? Will they get additional staffing in order to participate or are they expected to do this with existing capacity?

17:30:52 From Ben Duncan (Kearns & West) to Everyone:

questions can be captured in chat, and we will track for future discussions on these topics. thanks

17:34:24 From Cameran Murrphy to Everyone:

For TA: There were at least a few orgs I know in WashCo who had no housing services programs prior to SHS funding and had to build their SHS from the ground up with little to no guidance and support. I know TA is needed for orgs to build programs that are in alignment in the minimum requirements of service provisions and program development. All too often I know participants are having VASTLY different experiences from org to org because these orgs have had to figure out how to implement SHS largely on their own

17:38:49 From Cameran Murrphy to Everyone:

To Mercedes' comment about housing providers, pairing TA to the landlord retention is what I'd like to see (and I know landlord retention was before my time in TCPB). As I have seen that goal be implemented, I know housing providers have not received the supports they need to work with their SHS residents in combination with the residents' case managers and TA could manage that gap from the landlord retention goal

17:52:33 From Mercedes Elizalde to Everyone:

In the final report it would be helpful to know which organization/providers are using or have been through the existing programs in the list you collected

17:52:49 From Mercedes Elizalde to Everyone:

Was Welcome Home part of your outreach?

17:53:12 From Mercedes Elizalde to Everyone:

What is the process for "credit for prior experience" so that

17:53:36 From Kathryn Harrington to Everyone:

Great work getting to this point. Thank you.

17:54:27 From Mercedes Elizalde to Everyone:

Great work!

17:54:48 From Mercedes Elizalde to Everyone:

Its all feedback and what I will look for in the final

17:55:23 From Mercedes Elizalde to Everyone:

Also, let's not lean too hard on formal education, also needing to provide language accessible, on-the-job training

17:56:16 From Mercedes Elizalde to Everyone:

Some train the trainer opportunities for long-time high-quality veterans in the work