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Agenda

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

Meeting:	Supportive Housing Services Oversight Committee Meeting
Date:	February 10, 2025
Time:	9:30 a.m. to 12:00 p.m.
Place:	Virtual meeting (Zoom link)
Purpose:	Finalize and vote on FY24 regional report, recommendations, and transmittal letter. Receive an update from TCPB on healthcare systems alignment goal.

9:30 a.m.	Welcome and introductions
9:45 a.m.	Conflict of Interest declaration
9:50 a.m.	Public comment
10:00 a.m.	Final review and vote: Regional report, recommendations, transmittal letter
11:00 a.m.	**Break**
11:10 a.m.	TCPB-healthcare systems alignment goal update
11:55 a.m.	Next steps
12:00 p.m.	Adjourn

Supportive Housing Services Oversight Committee Meeting Summary

Meeting:	Supportive Housing Services (SHS) Oversight Committee Meeting
Date:	January 13, 2025
Time:	9:30 a.m. to 12:00 p.m.
Place:	Virtual meeting (Zoom)
Purpose:	Vote on housing funding memo to Metro Council on behalf of the SHS Oversight Committee, discuss proposed recommendations for annual regional report, receive a housing funding update.

Member attendees

Co-Chair Dr. Mandrill Taylor (he/him), Co-chair Mike Savara (he/him), Peter Rosenblatt (he/him), Kai Laing (he/him), Cara Hash (she/her), Felicita Monteblanco (she/her), Dan Fowler (he/him), Jeremiah Rigsby (he/him), Jenny Lee (she/her)

Absent members

Carter MacNichol (he/him), Mitch Chilcott (he/him) Dr. James (Jim) Bane (he/him), Margarita Solis Ruiz (she/her)

Elected delegates

Washington County Chair Kathryn Harrington (she/her), Metro Councilor Christine Lewis (she/her)

Absent elected delegates

Multnomah County Chair Jessica Vega Pederson (she/her)

Metro staff

Patricia Rojas (she/her), Yesenia Delgado (she/her), Breanna Hudson (she/her), Yvette Perez-Chavez (she/her)

Kearns & West facilitator

Josh Mahar (he/him)

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

Summary of Meeting Decisions

- The Committee unanimously approved sending the Housing Funding Memo to Metro Council.
- The Committee unanimously approved the December 2 and 9 meeting summaries.

Welcome and Introductions

Co-chairs Dr. Madrill Taylor and Mike Savara provided opening remarks and reflected on the purpose of building a functioning service system.

Josh Mahar, Kearns & West Facilitator, facilitated introductions between Committee members and reviewed the meeting agenda and objectives. He noted that once enough members joined to reach

quorum, the Committee would vote on approving the housing funding memo written by the Co-chairs and the two December meeting summaries.

Conflict of Interest Declaration

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

Kai Laing declared a potential conflict of interest as he works at Self Enhancement Inc., which receives SHS dollars.

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

Public Comment

Javonnie Shearn, Up and Over, provided public comment and shared statements from those who received services in Clackamas County. She stated it would be a tragedy for SHS funds to be reduced.

Recommendations

Yesenia Delgado, Metro, reviewed the FY 24-25 Annual Regional Report process and shared that Kris Smock, Kristina Smock Consulting, will support the Committee in drafting the regional report and transmittal letter. She shared that this discussion would help provide direction for Kris to draft the transmittal letter to discuss at the next meeting.

Committee members had the following questions and comments:

- **Question, Peter**: Last year's recommendation dashboard had many still in red and yellow. Are we adding to last year's recommendations? At what point are there too many recommendations? It is difficult to conceptualize this process while knowing Metro will move forward with a ballot measure that would change everything. This seems like an academic exercise.
    - **Metro response, Yesenia**: Last year's recommendations that were not accomplished will continue to move forward. Some of them fall under the Tri-County Planning Body's work. There will be some overlap between this year's and last year's recommendations. At this point, we do not know if any changes are happening, so it is important that this group continues to do the work to improve accountability.
- **Comment, Felicita Monteblanco**: I agree with Peter, there is tension and frustration. The way I am approaching this is that we still have a job to do and that our work and the ballot measure are two parallel paths.
- **Comment, Metro Councilor Christine Lewis**: No decision has been made. There is an opportunity to reform the measure. Metro Council shares frustrations with the recommendations still in red and yellow, which is proof that accountability and oversight need to be improved.

Co-chairs Taylor and Savara reviewed the draft recommendation topics which are regional priorities, oversight and accountability, jurisdictional partnerships and decision making, data integrity and evaluation, and provider partnerships. Draft language for each topic area can be found in the archived meeting packet on pages 48-52.

Committee members had the following questions and comments:

Regional priorities

- **Comment, Peter**: I like how this is worded. The overarching priority for next year needs to be around data. I am not sure if there is a willingness or ability for the jurisdictions to come to an agreement on data reporting. Consistent data across jurisdictional lines is needed to make data-driven decisions.
- **Comment, Co-chair Savara**: The country is at a key inflection point on how to address homelessness. These priorities will help jurisdictions make decisions from data and humane perspectives. There needs to be a conversation between providers and county partners. We need practices that align with the values of the SHS measure, not practices that are quick and easy. We have to prioritize approaches as there are not enough resources to do everything. I look forward to hearing from county leaders on this.
- **Comment, Dan**: I agree with Co-chair Savara. I have questions about what convening that conversation looks like and who is involved. I believe that key nonprofit providers and/or the people they are serving should be included. A bottom-up approach seems important for this critical work.
- **Comment, Kai**: It feels like we are addressing issues that are not formalized yet. We need to focus on the results of the report and address those results. We need to hear from the jurisdictions on their difficulties and priorities and ensure accountability rather than making and forcing decisions.
- **Comment, Felicita:** I agree with Dan's comments and want to elevate that providers are a part of that conversation.

Oversight and accountability

- **Comment, Peter**: The word "empowered" resonates as the key theme for this one. This language clarifies the role as oversight rather than advisory. Clackamas County never implemented its oversight committee for SHS and there is no accountability. Why was Multnomah County placed on a performance improvement plan for not spending money and Clackamas County was not for its failure to implement its oversight committee? Power is money; at some point, it seems that funding should be taken away for not implementing pieces. The contractual relationship needs to be evaluated.
    - **Response, Metro Councilor Lewis:** The relationship you are describing does not exist, which is one component of reform. As long as counties spend funds on allowed items, there is no accountability to certain components under the current intergovernmental agreements (IGAs).
    - **Metro response, Patricia Rojas**: Currently the IGAs charge Metro with oversight and accountability functions. Several functions are best practices, but there are questions for mechanisms to ensure local structures like the LIPs. The reason Multnomah County was placed on a performance improvement plan is that the IGAs require corrective action plans if there are material deviations from spend-down plans.
    - **Response, Washington County Chair Kathryn Harrington**: There are provisions in the IGAs for elected officials to get together for accountability. There will not be another IGA around SHS from the board I serve on with these gross generalizations.

Elected bodies must be treated as partners. We have come together to do something that no other multi-county jurisdiction has done before.

- **Comment, Felicita**: I resonate with "oversight" and "empower." I appreciate "funder best practices" as a critical piece of the work.
- **Comment, Dan**: Perhaps a specific oversight question can be, "Have you implemented your local advisory committee and other parts of your local implementation plan (LIP)?" to measure accountability and success.
- **Comment, Kai**: I suggest including "with service providers and partners" in the language to provide human-centered feedback beyond just data.

Jurisdictional partnerships and decision making

- **Comment, Peter:** I do not speak for the Clackamas County Board of Commissioners, but I do attend their meetings, and I feel that this would resonate with them. It speaks to the desire for clarification on process, decision-making, and what input means. I felt that lack of clarity as a provider and as a member of this committee.
- **Comment, Dan:** This is a hot topic and boils down to attitude. Counties have been doing social services work for years and are experts. Metro sees itself as the funder, but the funder is the taxpayers. The lack of trust and respect between the jurisdictions needs to be resolved.

Data integrity and evaluation

- **Comment, Washington County Chair Harrington**: I try not to respond to work in this Committee, however, I get frustrated with status updates and progress reports from Metro staff to Committee members. The draft data-sharing agreements in 2023 were put on pause, but during the second half of 2024, I pushed my staff to learn more about it. I got an update on Friday that there is just one last sticking point from county staff around data quality. I share this Committee's frustration and intend to follow up on this. I hope before the regional report is released, this will be resolved. Thank you for advancing this need.
- **Comment, Peter**: This is the key goal and I would list this recommendation first. It is hard to make decisions without this information. Counties need to be able to count Populations A and B in the same way. This issue connects to empowerment.
    - Multiple Committee members agreed that this is a priority and should be listed first.
- **Comment, Metro Councilor Lewis**: This is key. Metro has operated in good faith and has given concessions. I do not want folks disparaging Metro's team on this.
- **Comment, Co-chair Taylor**: Integrity is needed for trust. There is a lot of hard work to do. The intent is to not put down anyone's efforts and ensure this remains a priority and value. This connects to the underlying issue of trust.

Provider partnerships

- **Comment, Felicita**: This is critical and important work.
- **Comment, Peter**: Multi-year contracts are important and are not exclusive to pilot projects. Multi-year contracts should include cost of living increases. This is hard to reconcile with the ballot measure and living wages could increase costs of services, while the ballot could decrease the amount of funds available.
- **Comment, Co-chair Savara**: I suggest changing the last bullet to "building on promising practices to expand" and striking pilot projects.
    - Committee members agreed to this edit.

Josh asked the Committee if anything was missing or if there were any last reflections.

- **Comment, Cara**: The last two categories resonated a lot. Data integrity and partnership are consistent themes.
- **Comment, Peter**: Timelines and due dates are important and should be realistic and express urgency. How do we integrate last year's recommendations? Perhaps we can merge the recommendations to have a singular plan to work from.
- **Comment, Felicita**: I want to note there are things that we have recommended that are not done and I do not want to lose them.

Kris Smock, Kristina Smock Consulting, thanked the Committee for the discussion and confirmed she would incorporate the input into the next draft.

Yesenia confirmed that last year's recommendations will still move forward and supported Peter's suggestion of one singular comprehensive plan.

Co-chair Savara stated that a work plan and timeline for the recommendations would be helpful to receive from Metro staff. He reflected that the Committee does not have visibility on how some recommendations are moved forward. He thanked the Committee for their input.

Co-chair Taylor stated that when reviewing recommendations to form a comprehensive plan, it could be helpful to think about barriers to implementation to see if there is something systemic occurring that the Committee is not thinking about.

SHSOC Housing Funding Memo

Co-chairs Savara and Taylor reviewed the Housing Funding Memo to send to Metro Council on behalf of the Committee.

Dan noted that once the Committee knows the full recommendations of the ballot, they may have further comments.

Decision: The Committee unanimously approved sending the memo to Council.

Decision: The Committee unanimously approved the December 2 and 9 meeting summaries.

Housing Funding Updates

Metro Council President Lynn Peterson thanked the Committee for their work and shared that Council is preparing to consider a ballot measure and an accompanying ordinance. The ordinance will go to staff with specific deadlines. She shared that Council has heard from many voices and the Stakeholder Advisory Table and reflected that a difficult decision needs to be made when facing funding cliffs and public skepticism. She thanked the Committee for sharing the memo with Council and that she read the draft in the meeting packet.

She reflected on the group's discussion on themes of limited oversight authority, unclear decision making pathways, and barriers to data sharing and reporting. She stated that the measure would establish a more empowered Housing and Homelessness Policy Advisory Committee (HHPAC), allow for a negotiation of the IGAs, adopt outcome-based performance management practices, and support evidence based decision making.

Committee members had the following questions and comments:

- **Question, Co-chair Taylor**: I appreciate your attendance and responding in real time to the memo. Elected officials are included in the HHPAC. When was that proposed and how do you envision their role complementing that of experts and providers?
    - **Response, Metro President Peterson**: Elected officials are where recommendations end up and they have the authority to implement. The structure will help regionalize programs and foster collaboration. Some groups have advocated for no elected officials, but they are trusted by the voters.
- **Comment, Peter**: Advisory and oversight are two separate roles. It seems that affordable housing has shifted from an allowable use to a mandated activity, why? Could a county not allocate funds to affordable housing and only allocate to SHS? It seems that voters would be voting on something where the details would be decided after the election. How many units of affordable housing would be built? How would PSH services be in place?
    - **Response, Metro President Peterson**: The affordable housing component you are speaking to was part of an allocation model to show how allocations can be made to provide stability for counties. The draft ordinance has HHPAC providing a recommendation to Council of an allocation formula that works for all counties and to define what they are trying to achieve on affordable housing. The allocation model work will move at the speed of trust if the ballot is passed. The ballot measure focuses on the extension, personal income tax reduction, and making affordable housing an eligible use. Each county's allocation will be a part of the regional action plan which has to be approved by Council.
- **Comment, Dan**: Can you speak more about the personal income tax reduction? Typically, counties have been the social service providers, and I support the idea of accountability and removing the city program. Providers have built out programs and hired staff, and they are now scared and worried about the change. Can there be a transition period over two to three years to give providers time to adapt to funding changes?
    - **Response, Metro President Peterson**: There will be a transition period. The personal income tax rate would include a 20-year extension with a 25% personal income tax rate. The Portland Metro Chamber and Here Together Coalition have agreed to an upfront 10% cut which would increase to 15% in 2031. There are still questions as to how, when, and who receives the tax cut. The SHS measure should not be the only funding in this region, and state funding will need to be considered.
- **Comment, Felicita**: I appreciate Dan's comments on each county's uniqueness and look forward to having conversations with cities to get their perspective. When can we read the ballot measure? We have stated that we want to invest in culturally specific providers and I am worried about them not having the resources they need and having to have conversations on program or staff cuts.
    - **Response, Metro President Peterson**: The Metropolitan Mayors' Consortium (MMC) has asked Metro for funding to not go through the counties as each county treats cities differently. Cities are using their general fund to support housing services and they are looking for support. The ordinance directs HHPAC to figure out what a city program could look like and if that should be incorporated into LIPs. The tax is volatile and cuts are already happening. We want to budget in a way that provides stability for providers. There is work to do in the ordinance and with pay equity issues between the three counties.
- **Comment, Co-chair Savara**: The State wants to be a partner in this work. Service providers need to be supported. It is hard to provide support if the expectation is for them to cut programs, lay off staff, and decrease their scope of work. The Stakeholder Advisory Table wants to see that balance.

- **Response, Metro President Peterson**: There are larger societal issues, including a healthy economy. Some signs indicated that the economy may be going in the wrong direction, and we need to make progress and commit to solving these issues. Long-term stability could worsen if we do not make a change.

Next Steps

Yesenia stated that feedback on the draft report would be due on January 14 and the Committee will meet again on January 27, 9:30am-12:00pm.

President Peterson shared next steps for Council include sharing the draft ballot and ordinance language before the Thursday work session. January 23 there will be the first reading of the language with public testimony, which will likely lead to amendments.

Adjourn

The meeting adjourned at 12:10 pm.

Supportive Housing Services Oversight Committee Meeting Summary

Meeting:	Supportive Housing Services (SHS) Oversight Committee Meeting
Date:	January 27, 2025
Time:	9:30 a.m. to 12:00 p.m.
Place:	Virtual meeting (Zoom)
Purpose:	Receive Metro tax collection and disbursement update, receive FY24 admin costs update, receive FY24 technical regional report status update, review FY24 transmittal letter, review FY24 recommendations.

Member attendees

Dr. James (Jim) Bane (he/him), Co-chair Mike Savara (he/him), Peter Rosenblatt (he/him), Kai Laing (he/him), Cara Hash (she/her), Felicita Monteblanco (she/her), Dan Fowler (he/him), Jeremiah Rigsby (he/him), Jenny Lee (she/her)

Absent members

Co-Chair Dr. Mandrill Taylor (he/him), Carter MacNichol (he/him), Mitch Chilcott (he/him), Margarita Solis Ruiz (she/her)

Elected delegates

Washington County Chair Kathryn Harrington (she/her), Metro Councilor Christine Lewis (she/her)

Absent elected delegates

Multnomah County Chair Jessica Vega Pederson (she/her)

Metro staff

Yesenia Delgado (she/her), Breanna Hudson (she/her), Yvette Perez-Chavez (she/her), Valeria McWilliams (she/her)

Kearns & West facilitator

Josh Mahar (he/him)

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

Summary of Meeting Decisions

- The committee did not take any formal votes during this meeting.

Welcome and Introductions

Co-chair Mike Savara provided opening remarks and reflected on the 2025 Portland Tri-County Point in Time Count as an important moment for the housing and homeless system, where surveys and data will be collected about where people experiencing homelessness slept on the night of January 22nd.

Josh Mahar, Kearns & West Facilitator, facilitated introductions between Committee members and reviewed the meeting agenda and objectives.

Supportive Housing Services Oversight Committee Meeting Summary

Conflict of Interest Declaration

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

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

Jenny Lee declared she works at Coalition of Communities of Color, which received SHS funding.

Public Comment

No public comment was received.

Metro Finance Update

Jane Marie Ford, Metro, provided a Metro finance update on monthly tax disbursement. She provided a high-level overview of the full memo in the meeting packet.

Committee members had the following questions and comments:

- **Question, Dr. Jim Bane:** I have hard time understanding the line-graph data, is there another way this data could be displayed?
    - **Comment, Peter:** I agree.
        - **Metro response, Jane:** Yes, I can do that. We are currently testing a new month-to-month graph. We can share an online clickable graph so folks can see the data differently.

Yesenia Delgado, Metro, provided information on administrative rates and what Metro is seeing. Currently, Metro does not have a mechanism to collect rates from service providers, but they do from counties. Jane shared an analysis on this, and Yesenia asked what information the Committee needs to have the conversation around administrative and service rates.

Committee members had the following questions and comments:

- **Comment, Peter**: I appreciate seeing this, and I am confused. There is a difference between administrative rates, what we put in the contract, and what the true cost of that work is. I think we could explore these differences, and I suspect we would find significant gaps in what's contracted versus what's overhead rates.
- **Comment, Felicita Monteblanco**: Thank you for this. This data is really critical to the non-profit sustainability conversation. I hope there is an opportunity to create a floor, to have an automatic percentage that the counties can provide, and then create opportunity for providers to have negotiations.
- **Question, Co-chair Savara**: It is difficult to understand county contracting processes. I suggest we have a future topic around county contracting with specific county staff here to discuss this. What is informing their planning and thinking around budgeting for their needs?
    - **Metro response, Yesenia**: On the administrative side of things, I think this a good first step toward that conversation. It is helpful to hear this and we will follow up with our county partners to see what additional information we can get. We are

scheduling workplan and budget presentations later this spring and into the summer.

- **Question, Dan:** If 10% is the contracted rate versus an actual rate, do you give your actual rates as a non-profit? It would be nice to know what the difference is.
    - **Peter response:** Not many funders want to know the true and accurate cost of your services. The true and accurate costs of programming is unknown to counties. They only know what they are asking for.
- **Comment, Mike:** I want to know if we are keeping rates at 10%, at that maximum limit. If we are under 15%, we need to understand the reason. We should be matching the federal government's posture on this.

Jane Marie shared that she would be happy to answer any follow up questions via email.

FY24 Technical Report Update

Kris Smock, Kristina Smock Consulting, reviewed the drafted FY24-25 Annual Report. She shared that the report is intended to provide a comprehensive summary and analysis. The revised draft that the committee received in the meeting packet the meeting packet incorporated feedback from the committee. To address committee comments, Kris added additional framing and contextual information throughout the Report and Transmittal Letter. She will incorporate the final fiscal update into the report. The final Technical Report and final revised Transmittal Letter will be in the February SHS Meeting Packet for the committee's final review and approval.

Committee members had the following questions and comments:

- **Comment, Felicita:** I request that we receive redlined documents so we can follow the changes made between meetings.
    - **Kris' response:** Yes, we can do that.
- **Comment, Dan:** I would like to see us incorporate a clear picture of tax collection data.
    - **Kris response:** We can try to include a link to the updated dashboard for the most clear and up-to-date data capture.

FY24 Transmittal Letter Review

Introductory Section

Kris started by going over the introductory section of the Transmittal Letter, which includes a brief introduction, the role of the measure and committee, the purpose of the report, and framing around the status of SHS as Metro moves into the second part of implementation.

Committee members had the following questions and comments:

- **Comment, Peter:** It is important to note that the report covers a certain timespan, but we are sending it out in a different timespan. Shortly into the new timespan, Clackamas County Regional Long Term Rent Assistance (RLRA) hit its cap and because of possible budget challenges, they are pulling back. We may want to indicate, with an asterisk or footnote, the changes and the caps that may have happened after the timespan of this report.
    - **Kris response:** You are getting at a challenge Metro faces each year with this report. We aim to present a comprehensive body of information. We could add some language noting this is focusing on a particular data set, and that data may have

changed when we give presentations about the report. I will try and add more clarifying language about what we saw through the end of the fiscal year.

- **Comment, Dan:** We have to keep in mind that not everyone will get a presentation, so that clarifying language in the report will be helpful.
- **Comment, Dr. Bane:** I appreciate the highlighted sentence. It is reflective of what I see in the report, and the times are changing.

Key Highlights Section

Kris reviewed the key highlights section, which serves as an executive summary of the key content of the report.

Committee members had the following questions and comments:

- **Question, Peter:** I suggest adding a high-level introductory sentence on what projects the committee is working on. I am also confused on RLRA and the overlap with permanent supportive housing (PSH). Is all RLRA, PSH and vice versa?
    - **Kris response:** I can add more information on RLRA program policies and who it serves. RLRA is a tool to provide long term rent assistance and commonly used as a key component of PSH. One of the challenges referenced in the transmittal letter and recommendations are around needing to do work for greater alignment on PSH definitions.
    - **Metro response, Yesenia:** Kris spoke eloquently about this. They are not interchangeable, there are differences. In Summer 2024, the Metro PSH lead joined an SHS meeting to give a presentation, and we could link that meeting in the final report so folks can review that final presentation.

Challenges Section

Kris reviewed the challenges section, which focuses on four broad topic areas: growing need, competing priorities, financial oversight, and regional evaluation.

Committee members had the following questions and comments:

- **Comment, Peter:** Clackamas County has not had an LIP since April of 2022. Any additional indication would be incorrect. I think Washington County was the only county to create a multi-year expansive LIP, so maybe it can be written as a kudos to Washington County.
    - **Kris response:** There was general agreement among this group to keep the report focus at the regional level and not call out specific counties in the transmittal letter. But I will make sure the language is accurate.
- **Comment, Dr. Bane:** Related to the "growing need" section, I think that is an unrepresented challenge and is of extreme importance. The need is outpacing the resources. We need to know who this need is coming from. Who are the people coming into the system and what do they need? It would help to clarify who is coming into the system, and the data from the coordinated entry program could give us an up-to-date snapshot of who is coming in, where they are coming in, and what they need.
    - **Kris' response:** That is a good point. We can look at the data and flush this section out a little bit.
- **Comment, Peter:** There may be some confusion in Clackamas County about this. Clackamas County former Board of Commissioners has different talking points than what this report

shows, this report is not how we have been talking about the data. Clackamas might need to see a call out of the region-specific data.
    - **Kris' response:** I can talk about the range.

Kris indicated she would be providing an updated version, either redlined or highlighted by revised sections. Josh reminded the group to send any additional edits to Kris as soon as possible.

FY24 Recommendations Development

Kris provided a broad overview of the edits to the recommendations that were made after the committee's discussion in the January 13th meeting. Josh indicated that there would be a temperature check on these recommendations with the group following Kris' overview. Yvette displayed the drafted recommendations.

Committee members had the following questions and comments:

- **Comment, Peter:** As we look at the new priorities, I would like to see more sequences. I also want to see that providers want to be at the decision-making table. We want to be thought partners and help create the system and be a part of that accountability. It could expand in the provider partnership section, or in the oversight section. Metro, Counties, and providers need to be working together.

Josh called for a temperature check, asking members to share a thumbs up for full approval, a thumb sideways for approval but with some additional suggestions, and a thumbs down if they had concerns with approving the recommendations. A majority of the group indicated via thumbs up that the draft shared today incorporates the committee's thoughts and recommendations and that they would be comfortable approving the recommendations. Some group members indicated via thumbs sideways that they were comfortable with the recommendation but also had ideas for additional improvement. No members shared a thumbs down.

Josh facilitated discussion around final suggested improvements.

- **Comment, Co-chair Savara:** This generally captures our recommendations. There are a few recommendations where I do not think we have solidified a solution. I want to hear from other folks.
- **Comment, Peter:** I shared my thoughts moments ago.
- **Comment, Dr. Bane:** I appreciate and generally like the recommendations. I missed the last meeting, and have not seen a meeting summary, so I am not really sure I understand everyone's thoughts and how these recommendations came to light. I want to review the last meeting summary.
    - **Josh response:** I know that meeting summary is working it's way through internal approval and we will make sure you receive it and aim for a quicker turnaround on those.
- **Comment, Kai Laing:** It is good to see the group's additional suggestions for refinement, and this is good as written.
- **Comment, Jeremiah Rigsby:** I agree with a lot of the things folks are saying around providers. I care about jurisdictional partnerships and decision-making space. I am concerned about the swirl around Metro and the counties' roles and am wondering what our role is as we think about oversight bodies moving forward.

- **Comment, Felicita:** I want to give major kudos to Kris for this work. The only thing that stood out to me was some of the language on page 8 and 9 of the letter around oversight and accountability and jurisdictional partnerships. I wrote out my suggested changes in the chat:
    - Page 9 suggested rephrasing: *The oversight committee recommends that collaborative efforts to shape the processes and requirements of the SHS measure are consistently used. The Committee requests that a framework for decision-making be agreed upon by the Counties and Metro with a process that ensures the Oversight Committee itself can enact decisional authority on key topics relating to the oversight of the SHS funds*.
    - Page 8 suggested rephrasing: *The SHS Oversight Committee through Metro staff should be empowered to conduct core oversight functions in alignment with funder best practices. This includes performance monitoring, evaluation, and compliance activities on a regular basis.*
        - **Kris Response:** I would like to hear from committee members if they are comfortable with these recommended changes.
- **Comment, Co-chair Savara:** I fully support the recommended changes here. For the first one, I love the idea of creating a framework that Metro would work with the counties on. That framework should encompass how decisions on funding are made and bring clarity to who makes budget decisions or why they are made. There have been times when that has not been clear. I like that this elevates the committee's role of meaningful oversight.
- **Comment, Peter:** I agree with what Mike beautifully said.
- **Comment, Dan:** I am wrestling with this tension, but where does it exist? The funding and oversight of this measure is from the top down and region-wide, while the delivery is bottom up. It comes from the nonprofits and the counties. Policy is better with cooperation and consensus decision-making. We have to decide things collaboratively. I support the language Felicita put forward. I really like the language in the oversight and accountability section.
- **Comment, Cara Hash:** I have no additional thoughts. Felicita's additional language captures that piece.
- **Comment, Jenny:** I echo that. Thank you, Felicita, and thank you Kris for your work on this.

Josh asked folks to indicate their support for Felicita's proposed updates, and there was full agreement among committee members to incorporate Felicita's recommended language. Josh noted that the group will officially vote on these in the next meeting.

Next Steps

Yesenia stated that feedback on the draft report would be incorporated into the next version, with the hope of voting on the draft at the February 10th meeting. All additional feedback or questions should be sent to Kris as soon as possible. Yesenia will reach out to members not in attendance to bring them up to speed. Depending on the vote on February 10th, we will begin to work on the presentations to counties and Metro Council. The Metro Council presentation is scheduled for March 4th, Multnomah County on March 18th, and Washington County on April 1st. We are still working on scheduling Clackamas County.

Adjourn

The meeting adjourned at 11:23am.

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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Supportive housing services – Oversight committee
Overview of role and responsibilities
Last updated: September 2024

Background

In May 2020, voters in greater Portland approved Measure 26-210 to fund services for people experiencing or at risk of homelessness. The measure also established a "community oversight committee to evaluate and approval local plans, monitor program outcomes and uses of funds."

The Metro Council established the Regional Oversight Committee on December 17, 2020 by amending Metro Code Chapter 2.19 via Ordinance No. 20-1453. The purpose of the Regional Oversight Committee is to provide independent program oversight on behalf of the Metro Council to ensure that investments achieve regional goals and desired outcomes and to ensure transparency and accountability in Supportive Housing Services Program activities.

Oversight committee role and responsibilities

Requirement	Source text
Local implementation plans and Regional Plan	
Evaluate and recommend Local Implementation Plans	**SHS Work Plan, section 3.4**: The committee will be charged with the following duties…A. Evaluate Local Implementation Plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval.
Approve Regional Plan developed by the Tri-County Planning Body	**Tri-county planning body charter**: Develop a Regional Plan for *approval by the Regional Oversight Committee* that incorporates regional strategies, metrics, and goals as identified in Metro SHS Workplan and the counties' Local Implementation Plans.
Review LIP amendments and recommend approval or denial to Metro Council for: • Alignment with Tri-County Plan	**Intergovernmental Agreement, section 5.2.4**: Within one year of the adoption of the Tri-County Plan, and as needed thereafter, Partner will bring forward any necessary amendments to its Local Implementation Plan that incorporate relevant regional goals, strategies, and outcomes measures. The ROC will review the amendments and recommend approval or denial of the Plan amendments to the Metro Council.
Request County Partner amend its LIP: • Based on one or more SHSOC recommendations; • Based on a significant change in circumstances impacting homelessness in the region;	**Intergovernmental Agreement, section 5.2.3**: Within 60 days of the date that Partner presents its Annual Program Report to Metro Council, Metro or the ROC may, in consultation with the other, request that Partner amend its Local Implementation Plan based on one or more ROC recommendations or a significant change in circumstances impacting homelessness in the Region. **SHS work plan, section 5.3**: The Regional Oversight Committee will review each Annual Progress Report and may recommend changes to the Local Implementation Plan to achieve regional goals and/or to better align the Local Implementation Plan with the Work Plan.

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Requirement	Source text
• To achieve regional goals; and/or • To better align LIP with SHS Work Plan.	
Annual reporting and work plans	
Review county annual work plans	**Intergovernmental Agreement, section 5.3**: Beginning in FY 2022-23, Partner must annually submit an Annual Work Plan to Metro and the ROC for their review on or before April 1 for the subsequent Fiscal Year.
Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals	**SHS work plan, section 3.4**: The committee will be charged with the following duties:…B. Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals.
Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes	**SHS work plan, section 3.4**: The committee will be charged with the following duties:…D. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.
Fiscal oversight	
Monitor financial aspects of program administration, including review of program expenditures.	**SHS work plan, section 3.4**: The committee will be charged with the following duties:…C. Monitor financial aspects of program administration, including review of program expenditures.
Annual review and consideration of whether the recommended administrative costs should be reduced or increased. (for Metro, County Partners and service providers)	**SHS work plan, section 5.3**: As part of the annual review process, the Regional Oversight Committee will evaluate tax collection and administrative costs incurred by Metro, Local Implementation Partners and service providers and consider if any costs should be reduced or increased. The committee will present any such recommendations to the Metro Council.
Review Metro Budget	**IGA 5.4.1:** At least annually, Metro will prepare a written budget for its SHS program that details its use of Income Taxes and its Administrative Expenses and will present its SHS budget to the ROC [Regional Oversight Committee]. The ROC will consider whether Metro's SHS budget, its collection costs, and its Administrative Expenses could or should be reduced or increased. The ROC may recommend to the Metro Council how Metro can best limit its collection and Administrative Expenses in the following Fiscal Year.
Review five-year forecast	**IGA 7.2.1.1:** Metro's CFO, in consultation with the FRT, must prepare a five-year revenue forecast to support the Counties in developing their annual budgets and revising current year estimates as needed. The forecast will evaluate Income Taxes collection activity, SHS program expenditure activity, cash flows, adequacy of funds in Stabilization Reserves, economic factors impacting tax collections, and the overall financial health of the SHS program. Metro will provide these forecasts to the ROC and TCPB by the first business day in December, and provide timely updates of those projections, as available.

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Requirement	Source text
Other	
Provide input on corrective action plans before Metro requires them of counties	**Intergovernmental Agreements, section 6.3.5**: after appropriate notice and opportunity to remedy identified concerns, Metro reasonably determines that Partner is not adhering to the terms of its Plan, current Annual Work Plan or Annual Program Budget, or current spend-down plan, then Metro may, with input from the ROC and from Partner, require Partner to develop a Corrective Action Plan.

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Supportive housing services regional oversight committee

Meeting guidelines

Arrive on time and prepared.

Share the air – only one person will speak at a time, and we will allow others to speak once before we speak twice.

Express our own views or those of our constituents; don't speak for others at the table.

Listen carefully and keep an open mind.

Respect the views and opinions of others, and refrain from personal attacks, both within and outside of meetings.

Avoid side conversations.

Focus questions and comments on the subject at hand and stick to the agenda.

When discussing the past, link the past to the current discussion constructively.

Seek to find common ground with each other and consider the needs and concerns of the local community and the larger region.

Turn off or put cell phones on silent mode. Focus on full engagement in the meeting, and refrain from conducting other work during meetings as much as possible.

Notify committee chairperson and Metro staff of any media inquiries and refer requests for official statements or viewpoints to Metro. Committee members will not speak to media on behalf of the committee or Metro, but rather only on their own behalf.

Group agreements

We aren’t looking for perfection.

WAIT: why am I talking / why aren’t I talking.

You are the author of your own story.

Impact vs intention: Intention is important, but we attend to impact first.

BIPOC folks or folks with targeted identities often don’t / didn’t have the privilege to assume best intentions in a white dominant space.

Invited to speak in draft- thought doesn’t need to be fully formed.

We are all learners and teachers.

Expertise isn’t privileged over lived experience and wisdom.

Liberation and healing are possible.

Expect non-closure.

Supportive housing services

Regional annual report

July 1, 2023 – June 30, 2024

DRAFT 02-03-25 for oversight committee approval

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Cover page images: top left: Hoa, senior case manager at Clackamas County's short-term rent assistance program; top right: Hazel Ying Lee Apartments in Southeast Portland, which includes SHS-funded permanent supportive housing; bottom left: Khwat yaka haws or Auntie's Place, a Milwaukie shelter operated by Native American Youth and Family Center (NAYA); bottom right: Chris and Miranda, employees on Cultivate Initiatives' Community Beautification team, a workforce development program in east Multnomah County for people experiencing homelessness.

Memo

Date: February 10, 2025

To: Metro Council

From: Supportive Housing Services Regional Oversight Committee

Subject: Regional annual report for July 1, 2023-June 30, 2024

A report to the Metro Council and the community from the Supportive Housing Services Regional Oversight Committee

Greater Portland faces a widespread housing and homelessness crisis that is impacting communities across our region. Having a stable place to call home is a fundamental human need, but for tens of thousands of our neighbors, stable housing is increasingly out of reach. Incomes in the greater Portland area are not keeping up with rising rents, and the region's affordable housing supply has not kept up with demand. Insurmountable housing costs are a major contributor to evictions, which have risen sharply in recent years. For households facing housing instability, additional challenges such as a job loss, health crisis, lack of support networks or significant unforeseen costs can lead to homelessness.

In May 2020, voters in greater Portland took a historic step to address this crisis by approving a significant new funding source to support housing access and stability for people across our region. The supportive housing services fund, or SHS, reflects voters' commitment to address a problem that has been decades in the making due to chronic underinvestment in systems of care to meet community needs. It provides an unprecedented infusion of flexible resources that expands the region's capacity to meet the needs of people experiencing housing insecurity, with the goal of connecting at least 5,000 households experiencing prolonged homelessness with permanent supportive housing and stabilizing at least 10,000 households experiencing short-term homelessness or at risk of homelessness in permanent housing.

The Supportive Housing Services Regional Oversight Committee is tasked with monitoring the implementation of the SHS fund on behalf of the region's voters. Since the SHS fund's launch in July 2021, the committee has received quarterly and annual reports from Clackamas, Multnomah and Washington counties, which we have reviewed for consistency with the counties' approved local implementation plans, annual work plans and SHS regional goals. We have also received quarterly and annual reports on Metro's administration of the SHS fund. We have worked to promote accountability to voters and address implementation challenges, and we have made recommendations in an effort to strengthen the SHS fund's impact.

Our third annual regional report for the SHS fund covers the period from July 1, 2023 through June 30, 2024. The report provides a formal assessment of counties' performance, challenges and outcomes in year three of the fund's implementation. This memo highlights some of the key achievements that are summarized in more detail in the

report. It also identifies several critical challenges that will need to monitored and addressed to continue the SHS fund's forward momentum.

Based on this assessment, along with our ongoing monitoring of performance to date, we believe that SHS implementation has reached a critical inflection point. **The growing pains of the first few years of implementation have been largely overcome, and the initial difficulties associated with rapid ramp up have transitioned to the challenges of building a stable and sustainable system of care.** Our 2025 recommendations to Metro Council aim to strengthen the SHS fund's impact as we move into this new phase of implementation.

KEY HIGHLIGHTS

The results from the SHS fund's first three years of implementation demonstrate the promise of this historic investment in our region's homelessness response system. This section summarizes key accomplishments from the period that is the focus of the report, July 2023 through June 2024, though it is important to note that SHS implementation has continued to advance and evolve in the months since then.

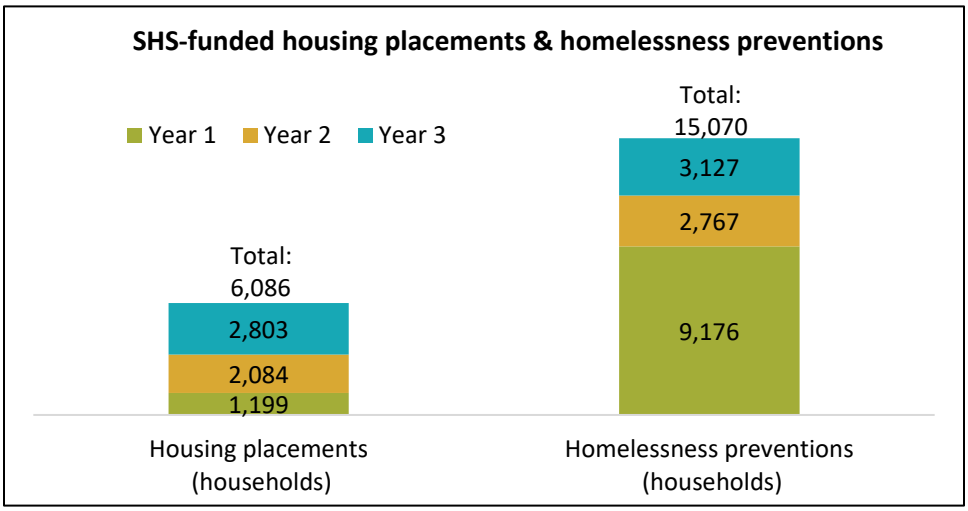
Permanent supportive housing capacity

The SHS fund prioritizes solutions for people with disabilities experiencing prolonged homelessness through investments in permanent supportive housing, which pairs rent subsidies with ongoing access to services to support housing stability.

SHS-funded services and rent assistance supported 4,055 units of permanent supportive housing across the region through June 2024, including 1,006 units added in year three. Once these units are fully leased up, they will be able to house 49 percent of the estimated households currently in need of this level of support.

Housing placements and homelessness preventions

In the first three years of implementation, SHS-funded programs placed 6,086 households (9,817 people) experiencing or at risk of homelessness in permanent housing and prevented 15,070 households (23,902 people) from losing their housing.



Housing placements listed for each year represent new placements.

In year three, this included:

- **Permanent supportive housing**: 1,253 households (2,028 people) placed in permanent supportive housing for people experiencing prolonged homelessness
- **Rapid rehousing**: 1,347 households (2,503 people) placed in permanent housing through short- and medium-term rent assistance and services
- **Other permanent housing**: 203 households (244 people) placed in other types of permanent housing
- **Homelessness preventions**: 3,127 households (7,520 people) prevented from losing their homes through rent assistance and eviction prevention services

One of the key tools supporting the SHS fund's housing placements is the **regional long-term rent assistance** program, which provides rent subsidies for permanent supportive housing as well as other types of housing placements. Over the first three years of implementation, 3,132 households (5,179 people) were housed through this SHS-funded program, including 1,180 households newly leased up in year three.

Once households make the transition from homelessness into housing, SHS funding continues to provide rent subsidies and case management as needed to support housing stability. **Housing retention rates** from year three show that an average of 92% of households placed in permanent supportive housing remained housed 12 months later.

SHS funding also created or sustained 1,430 **emergency shelter** beds/units in year three, providing 2,698 households (3,828 people) experiencing homelessness with interim stability and support.

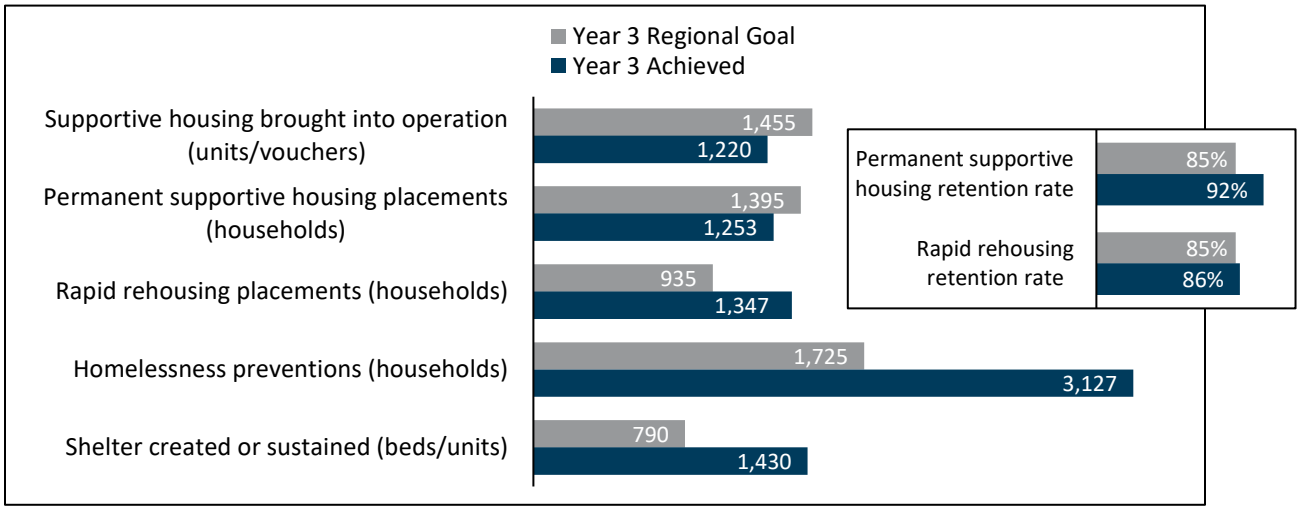
Advancing racial equity

The SHS fund is guided by a commitment to lead with racial equity by improving access to services for communities of color disproportionately impacted by housing instability and homelessness. Data from year three demonstrate that **people of color are accessing**

SHS-funded services at higher rates than their representation in the region's homeless population: people of color represent 28 percent of the region's homeless population and 59 percent of SHS-funded housing placements and homelessness preventions. Housing retention rates for people of color in SHS-funded housing placements are also equal or better than the retention rates for non-Hispanic whites.

Year three work plan progress

The counties exceeded their combined year three work plan goals for rapid rehousing placements, retention rates, homelessness preventions and shelter units. They achieved 84 percent of their combined goal for supportive housing brought into operation and 90 percent of their combined goal for supportive housing placements. They also made significant progress on qualitative goals related to racial equity and capacity building.



Provider partnerships

The SHS fund's achievements would not be possible without the on-the-ground work of more than a hundred nonprofit and community-based organizations that serve as the backbone of SHS implementation. **Counties contracted with 103 providers to deliver SHS services in year three, with contracts totaling $234.4 million**. This includes contracts with 19 culturally specific organizations totaling $42.1 million. The counties' partnerships with culturally specific providers nearly doubled between years one and three, and the total value of their contracts was more than five times greater.

Capacity building

Counties increased their capacity building supports to providers in year three, funding technical assistance and capacity building grants, providing expanded access to trainings and implementing strategies to address workforce challenges. **All three counties made improvements to contract administration practices to reduce invoice processing times and alleviate administrative and financial burdens for contracted providers.** They also strengthened contract monitoring and performance evaluation processes to support accountability and continuous improvement.

Cross-sector alignment

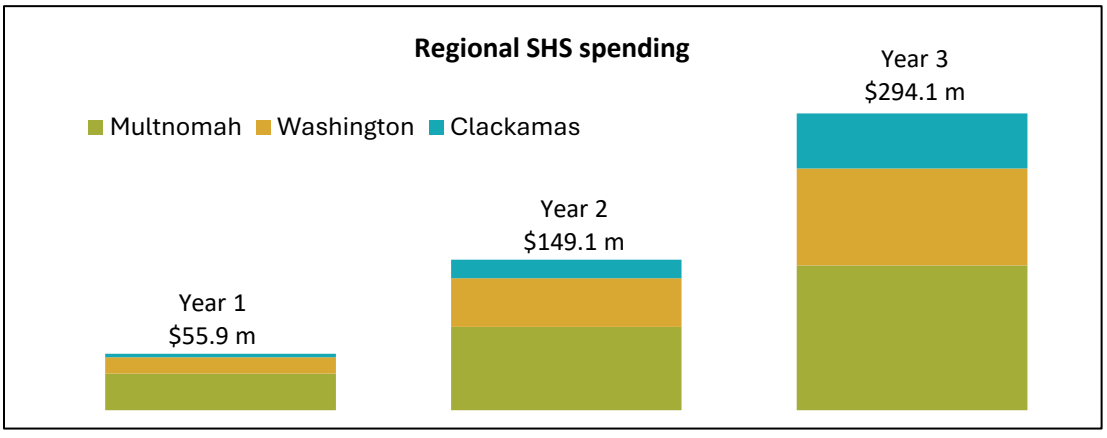
SHS funding has leveraged cross-sector resources and partnerships that are critical to building an effective regional homelessness response infrastructure. **The integration of SHS-funded supportive services and rent assistance with Metro affordable housing bond-funded capital investments has created 348 new permanent supportive housing units.** Counties have also used SHS funding to implement cross-sector initiatives and service integration in partnership with behavioral health, healthcare, community justice, workforce, housing and other systems.

Regional coordination

The tri-county planning body, or TCPB, worked with Metro, the counties and other partners in year three to develop implementation strategies for six regional goals focused on landlord recruitment, healthcare system alignment, employee recruitment and retention, coordinated entry, training and technical assistance. **The first approved TCPB strategy directs $8 million to support a menu of interventions to increase participation from landlords in SHS housing programs.** Metro's new regional capacity team partnered with the counties to develop regional training and technical assistance programs to support nonprofit providers. The counties and Metro also coordinated in year three to advance regional health and housing integration strategies, further align regional data collection and reporting, negotiate a data sharing agreement to facilitate regional evaluation, coordinate implementation of regional long-term rent assistance and share best practices.

Spending

Total SHS spending by the counties nearly doubled between years two and three, even though tax collections in year three were slightly lower than the previous year. **County spending was equivalent to 95 percent of the tax revenue collected in fiscal year 2023-24** and represented 45 percent of the total available resources including carryover from previous years. The remaining 55 percent of carryover funds have now been fully committed, and counties anticipate fully spending SHS resources in future years to meet current commitments and ongoing program costs.



CHALLENGES

The first three years of SHS implementation focused on rapid development and scaling up of the region's homeless services infrastructure. The second phase of implementation will focus on building a stable and sustainable regional system of care. As we transition into this second phase, we will need to address several key challenges.

Growing need

The impact of SHS housing placements and preventions is being outpaced by growing need as broader systemic factors continue to push more people out of their homes. The counties' inflow and outflow data show that in every county more households are entering homelessness in an average month than the number of households placed into housing. **Across the region, for every 10 households who exited the homeless services system to permanent housing in year three, 15 new households entered the system.** The number of households in need of permanent supportive housing across the region has increased by more than 20 percent since SHS launched, even after accounting for the thousands of households that SHS-funded programs have already housed. The need for eviction prevention services has also increased, while pandemic-era federal assistance has become more limited.

Competing priorities

As we move into the next phase of implementation, **we will need to make difficult decisions about resource allocations to make sure the SHS fund achieves its goals and racial equity commitments.** This includes determining the right balance between competing priorities, such as preventing homelessness through eviction prevention services, managing homelessness by increasing emergency shelter capacity, or creating pathways out of homelessness by investing in permanent supportive housing. These decisions should be informed by a comprehensive understanding of how SHS fits within the context of other available resources, the totality of needs and the areas with the greatest gaps. However, no entity is currently responsible for compiling and analyzing that information, making it difficult to get a full picture of the overall system needs and gaps.

Financial oversight

Improvements have been made in the quality and consistency of counties' data reporting, but **key gaps remain that undermine the committee's ability to provide effective oversight of the SHS fund.** The most critical gap is in the reporting on expenditures by Population A and B. Since the start of SHS implementation, there was a recognition by all parties that consistent reporting on spending by Population A and B would take additional time, as it required the development of a consistent methodology between the three counties. This information therefore was not provided by the counties in their year one reports. For year two, the committee was not able to conduct regional analysis of the counties' submitted data due to variances in reported service types, data availability and methodologies. In preparation for the year three reports, Metro staff provided a financial

reporting template and detailed guidance for reporting on Population A and B expenditures. The counties' year three reports included more robust data, but there were still inconsistencies in service type categories, allocation methodologies, assumptions and definitions that undermined regional analysis. Work is underway to address these issues, but the delay in providing consistent, regionwide information on Population A/B expenditures has undermined the transparency and accountability that voters deserve.

Regional evaluation

While progress has been made to strengthen regional data collection and reporting, **additional work is needed to develop an effective framework for regional evaluation of the SHS fund's impact.** The four jurisdictions do not share consistent interpretations of some of the key concepts and program components in the SHS work plan, making it difficult to roll up county-level data into a comprehensive analysis of progress toward the SHS fund's numerical goals. Differences in the methodologies and comparison data used for the counties' annual equity analyses make it difficult to conduct a regional analysis based on each county's findings. The regional outcome metrics in the SHS work plan also do not provide a clear framework or methodology for measuring the achievement of the 10-year regional goals. The counties' local implementation plans provide high-level guidance for SHS implementation, but they do not offer consistent or comprehensive metrics for measuring ongoing progress. As the SHS fund enters into its second phase of implementation, having an effective regional framework for evaluating progress will be essential to guide effective stewardship of the fund into the future.

RECOMMENDATIONS

The oversight committee issued a comprehensive package of recommendations in March 2024 to strengthen SHS implementation. Most of these recommendations are multi-year bodies of work. While Metro is responsible for coordinating implementation, many partners, including the counties, service providers and the tri-county planning body are engaged in carrying this work forward. Exhibit C summarizes progress to date on these recommendations and identifies the entities responsible for moving forward the remaining tasks. Over the upcoming year, the oversight committee will continue to monitor and support the work that is underway to further advance each of the recommendations.

Our 2025 recommendations to Metro Council focus on several critical issues that will affect the long-term success of the SHS fund's implementation:

1. Data integrity and evaluation

Providing transparency and accountability to voters requires regionally consistent data. Metro and the counties should work collaboratively to continue to align financial and programmatic data reporting. This includes addressing the challenges preventing consistent reporting on the Population A/B financial split. Metro and the counties will also need to work collaboratively toward shared operationalization of the definitions in

the SHS work plan for critical program components such as Population A and permanent supportive housing.

As we move into phase two of implementation, further work is needed to develop clear frameworks for evaluating progress toward the regional 10-year goals and the SHS fund's commitments to advancing racial equity. This will require updates and refinements to the regional outcome metrics in the SHS work plan and the development of consistent methodologies and comparison data for county and regional racial equity analyses. Updates to the counties' local implementation plans should also be considered to provide more consistent and comprehensive frameworks to guide ongoing implementation and measure each county's progress toward the regional goals.

2. Provider partnerships

The region's nonprofit and community-based organizations are the backbone of the SHS fund's success. SHS jurisdictional partners and the tri-county planning body should work to advance critical strategies that will support the capacity and stability of these organizations, with a particular focus on small, emerging and culturally specific providers. This includes:

- Expediting the development and implementation of regional strategies to provide equitable and livable wages for all frontline workers
- Continuing to improve counties' contract administration practices to address challenges related to payment delays and cash flow issues
- Improving contract administration consistency across all three counties to ensure alignment
- Building on promising practices to expand and institutionalize advance payments, multi-year contracts with annual rate increases and capacity building investments
- Engaging providers as full partners in SHS planning and decision making

3. Regional priorities

The SHS fund has supported a significant expansion in regional resources to address homelessness, but these resources will not be sufficient to meet the need. As we move into the second phase of SHS implementation, Metro Council should convene a conversation about regional priorities to ensure we are using SHS resources as strategically as possible to achieve the goals and racial equity commitments set forth in the SHS measure. This includes a discussion about how to allocate SHS funds between different priorities such as homelessness prevention, emergency shelter and permanent supportive housing.

This discussion should bring together counties, service providers and other stakeholders to learn about how counties are approaching these difficult decisions and engage in shared decision-making about regional priorities. It should be rooted in the values and guiding principles articulated in the counties' local implementation plans and the Metro SHS work plan and informed by input from the service providers doing the on-the-ground

work to implement SHS. It should also be grounded in an understanding of how SHS fits within the context of other available funding and where there are the greatest needs and gaps. To facilitate this conversation, Metro and the counties should ensure that comprehensive and consistent data are readily available to support data-informed decision-making.

4. Oversight and accountability

Appropriate levels of oversight and accountability are essential to ensure effective stewardship of tax dollars. As we enter the second phase of SHS implementation, it is critical for Metro and the oversight committee to be able to effectively monitor progress, measure impact, and perform their oversight and accountability roles. The oversight committee, through Metro staff, should be empowered to conduct core oversight functions in alignment with funder best practices. This includes performing monitoring, evaluation and compliance activities on a regular basis. Data and updates from these oversight activities should be provided to the oversight committee and Metro Council so they have the necessary information to operationalize their charge. Metro should have mechanisms to take corrective action as needed based on its performance monitoring to ensure regional accountability to the goals and commitments in the SHS work plan.

5. Jurisdictional partnerships and decision making

The development of a cohesive regional system of care requires effective coordination between the three counties and Metro. Further work is needed to clarify the roles and relationships between Metro and the counties and how decisions are made. This includes clarifying who makes what decisions, what is the process for making decisions and how is input incorporated into the final decision. Improved decision making is particularly needed in relation to the development and implementation of regional definitions and standards as well as reporting and monitoring tools and requirements. This may require a reassessment of the decision-making process laid out in the counties' intergovernmental agreements with Metro and potential updates to that process to support more effective decision making moving forward.

Effective regional coordination must be rooted in mutual trust and respect between Metro and the counties; the clarification of decision-making processes should include a shared commitment to dialogue and mutual listening to facilitate those relationships. The oversight committee recommends that collaborative efforts to shape the processes and requirements of the SHS measure are consistently used. The committee requests that a framework for decision making be agreed upon by the counties and Metro with a process that ensures the committee itself can enact decisional authority on key topics relating to the oversight of the SHS fund.

Next steps

The oversight committee charges Metro staff with developing a work plan for moving forward these recommendations over the upcoming year, with a timeline that reflects the urgency of these priorities. The annual work plan should also include Metro's plans for

advancing the elements from the committee's previous recommendations that are multi-year bodies of work and have not yet been completed. Metro should facilitate a process for the committee to assess, update and re-prioritize these previous recommendations to inform the development of the new work plan.

To support the committee's oversight role, we ask Metro to provide regular reports on annual work plan progress so that the committee can monitor the work happening across the region to move forward our recommendations.

TRANSFORMING LIVES

Behind the numbers in this report are thousands of people in our region whose lives have been transformed by the housing and services made possible through the SHS fund.

Metro and the counties have shared many moving stories of community members supported by SHS-funded programs, like Nicole in Washington County:

Nicole is a survivor of domestic violence and human trafficking from a young age. Originally from Eugene, she came to Portland with some friends who left her stranded. She stayed at a women's shelter for about three months before connecting with Washington County's SHS-funded rapid rehousing program. From there it was only a week between getting her first call from her case worker Amanda, with the Urban League, and moving into her new home in Beaverton.

At age 34, Nicole is living alone for the first time in her life. "It means more than life itself," she explained. "This program has done more for me than people will ever know." The apartment is more peaceful than other places she's lived, many of which weren't in a good neighborhood or environment. The apartment windows look out onto a little creek and Nicole finds the water relaxing. Home finally feels like a sanctuary: "Once I close the door, everything out there is out there and it's not here."

Amanda helps with necessities like furniture and food boxes, along with providing support and encouragement. "It's easy to feel like a statistic, but Amanda makes you more than a statistic; she makes you a success story, and she goes above and beyond to do so."

Now that Nicole has a safe, stable place to live, she's able to process and heal from a lifetime of trauma and living in survival mode. She plans to go back to school and ultimately would like to start a nonprofit to help other people who have experienced domestic violence and human trafficking. She wants to provide hope and a way out; she wants to be a light like Amanda has been for her.

Stories like Nicole's demonstrate the transformative potential of our region's commitment to invest in services that help people exit homelessness and transition into stable housing.

We are honored to have the opportunity to provide oversight for this important work and would like to thank Metro, the counties and especially the nonprofit and community-based organizations across the region working to implement SHS programs and services.

Thank you,

Supportive Housing Services Regional Oversight Committee members:

Mike Savara (Co-chair)
Mandrill Taylor (Co-chair)
Jim Bane
Dan Fowler
Cara Hash
Kai Liang
Jenny Lee
Carter MacNichol
Felicita Monteblanco
Jeremiah Rigsby
Peter Rosenblatt

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INTRODUCTION

In May 2020, voters in the greater Portland region approved Measure 26-210 to create a dedicated revenue stream for supportive housing services to address the region's homelessness crisis. The supportive housing services fund, or SHS, supports a continuum of services that help people find and keep safe and stable homes. The fund supplements existing local, state and federal resources to increase the region's capacity to meet the needs of people experiencing homelessness and housing insecurity.

The SHS fund has supported an unprecedented expansion of our region's homelessness response system. Metro, Clackamas, Multnomah and Washington counties and numerous nonprofit and community-based organizations are building the infrastructure for a regional system of care that will connect at least 5,000 households experiencing prolonged homelessness with permanent supportive housing and stabilize at least 10,000 households at risk of or experiencing homelessness in permanent housing over ten years.

This report provides an assessment of the SHS fund's third year of implementation, covering the period from July 1, 2023 through June 30, 2024. It includes:

- An overview of progress to date toward the SHS fund's regional goals
- A summary of SHS-funded housing and services in year three
- An analysis of populations served by SHS investments
- An assessment of counties' work to build a regional system of care through partnerships and capacity building with community-based organizations
- An overview of system development work including regional and cross-sector coordination
- Analysis of counties' progress to advance the SHS fund's racial equity goals
- An assessment of each county's performance in relation to its approved local implementation plan and annual work plan
- A financial review of year three budgets and expenditures

To put this assessment in context, it is important to understand the broader framework for the SHS fund's investments:

- The services funded by the SHS tax are just one component of the region's broader homeless services system. The information in this report focuses specifically on the activities and outcomes in fiscal year 2023-24 that were supported with SHS funding. SHS funding has significantly expanded the region's resources, but it represents only about 79 percent of the total funding that directly supported the region's homeless services programs in fiscal year 2023-24. The counties budgeted an additional $172.2 million in local, state and federal funding in fiscal year 2023-24 that supported services and outcomes not featured in this report. The role of other funding is particularly significant in Multnomah County, where SHS represented 64 percent of total homeless services funding in fiscal year 2023-24; in Clackamas and Washington

counties, SHS represented more than 90 percent of total funding. In all three counties, funding from other sources complements and supplements SHS funding. For example, Clackamas County uses state and county resources to fund services in historically underserved rural areas outside of Metro's boundary.

- Homelessness is a complex issue that involves multiple systems of care. While the region's homeless services system plays a critical role in identifying people experiencing homelessness and connecting them with services, addressing the underlying conditions of people's homelessness and the larger housing crisis requires cross-sector alignment between homeless services, behavioral health, housing, community justice, workforce, healthcare and other related systems. SHS funding has leveraged partnerships and alignment across these sectors, but the success of SHS programs ultimately depends on all of these systems having sufficient resources and capacity to meet local needs.
- While SHS investments have increased our region's capacity to help people experiencing homelessness transition to stable housing, broader systemic factors continue to push more people out of their homes. The counties' inflow and outflow data show that for every 10 households who exited the region's homeless services system to permanent housing in year three, approximately 15 new households entered the system. The number of households in need of permanent supportive housing across the region has increased by more than 20 percent since SHS launched, even after accounting for the thousands of households that SHS-funded programs have already housed.
- Stemming the crisis of homelessness in our region will require policy and systems changes to address the underlying factors that cause people to lose their housing. These include high rents, insufficient housing supply, incomes that do not enable people to meet their basic needs and Oregon's failure to provide an adequate system of mental health and recovery support services. The impact of these factors is even greater for people of color due to the pervasive effects of institutional and systemic racism. Achieving an end to homelessness in our region will require comprehensive solutions that address these root causes.

SUPPORTIVE HOUSING SERVICES BACKGROUND

Approval of Measure 26-210 created a new tax that was projected to generate an average of $250 million per year to fund a regional system of care implemented by four jurisdictions: Metro and Clackamas, Multnomah and Washington counties. The tax took effect in January 2021 and will expire in 2031 unless reauthorized by voters.

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

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

Guiding principles

SHS implementation is guided by the following regionally established principles:

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

Leading with racial equity

People of color are overrepresented in the region's homeless population due to the impact of systemic, institutional and interpersonal racism. To account for and correct these disparities, the SHS fund is guided by a commitment to lead with racial equity by especially meeting the needs of communities of color who are disproportionately impacted by housing instability and homelessness. The fund aims to increase the availability of culturally specific services across the region, improve outreach and language access, and ensure that all SHS services are delivered in a manner that is anti-racist and culturally responsive. The fund is also designed to engage people of color in

planning and oversight of SHS services through significant representation on local and regional advisory bodies.

Priority populations

The SHS fund serves two primary populations:

- Population A, defined as people with extremely low incomes and one or more disabling conditions, and who are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness
- Population B, defined as people who are experiencing homelessness or have substantial risk of experiencing homelessness

The SHS work plan requires that each county allocate 75 percent of SHS funds to services for Population A and 25 percent of SHS funds to services for Population B over the life of the measure.

The goal of this distribution of SHS investments is to build a system of care that fully addresses the needs of people experiencing prolonged homelessness, while also investing in programs that end and prevent episodic homelessness.

Service areas

SHS tax revenue is distributed to Clackamas, Multnomah and Washington counties to invest in local strategies to meet the needs in their communities. The three county governments work in partnership with nonprofit service providers and community-based organizations to develop and implement services based on priorities identified in counties' local implementation plans.

Eligible uses of SHS funding include:

- Outreach and engagement to connect people experiencing homelessness with available services and address their housing barriers
- Emergency shelter and transitional housing to provide people experiencing homelessness with interim stability and connect them with pathways to stable housing
- Housing navigation, placement and rent assistance to assist people in moving from homelessness to stable housing
- Housing retention case management to support people exiting homelessness to stabilize in and retain permanent housing
- Eviction prevention intervention, services and rent assistance to prevent people from losing their homes
- Wraparound supports including peer support services, workforce and employment services, legal services and connections to healthcare, mental health and recovery support services

Funding can also be used for capacity building and systems development to support program implementation, as well as administrative costs within applicable limits.

SHS funding is intended to work in tandem with other systems and investments. The fund was designed to strengthen the impact of the 2018 Metro affordable housing bond and other local, state and federal housing investments by providing the supports that people experiencing or at risk of homelessness need to find and stay in housing.

Similarly, because access to mental health and recovery support services is an essential element in addressing homelessness, SHS is designed to work in close alignment with the behavioral health system to connect people experiencing homelessness with clinical services and to link people accessing clinical services with housing. SHS is also designed to work in coordination with other related systems including the criminal justice, workforce and healthcare systems.

Accountability structure

Counties' SHS investments and activities are intended to be guided by their local implementation plans and the SHS work plan and led by designated agencies – Clackamas County's Housing and Community Development Division, Multnomah County's Joint Office of Homeless Services and Washington County's Department of Housing Services – with oversight by local community advisory committees and each county's board of commissioners.

The Metro Council appointed the Supportive Housing Services Regional Oversight Committee to provide regional oversight of the fund's implementation. The committee is charged with reviewing counties' quarterly and annual reports for consistency with approved local implementation plans and regional goals, monitoring financial aspects of program administration, assessing performance, and reporting to the Metro Council and each county's board of commissioners regarding the fund's challenges, successes and outcomes.

Funding allocations and requirements

As required by the voter-approved measure, SHS funding is allocated within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in each county. Metro is responsible for distribution and oversight of SHS funding.

Metro's intergovernmental agreements with each county include specifications for budgets, administrative costs, use of funds, financial reporting, contingency funds, stabilization reserves and debt service. The oversight committee is charged with providing financial oversight of funding investments and expenditures.

PROGRESS TOWARD 10-YEAR GOALS

Metro's supportive housing services work plan defines the SHS fund's regional 10-year goals and includes a detailed set of outcome metrics related to the goals. This section provides an overview of the SHS fund's progress toward achieving these regional goals over the first three years of implementation. The outcome metrics in the SHS work plan do not provide a clear framework of baseline data and numerical targets for measuring the achievement of the regional goals. The assessment in this section focuses on a subset of the outcome metrics and includes additional contextual data to support an initial analysis of progress. Comprehensive data for the rest of the outcome metrics is provided throughout the report by topic. (See Exhibit B for a complete list of the outcome metrics with an index of where each outcome metric is located in the report.) Metro will work with the counties and the oversight committee over the upcoming year to refine the outcome metrics to provide a more complete framework for evaluating progress toward each of the regional goals.

Housing stability

People of color are overrepresented in the region's homeless population due to the cumulative impacts of systemic and institutional racism. Recognizing that to effectively reduce homelessness we must address these disparities, the SHS fund's housing stability goals are guided by a commitment to serve people of color at rates that account for and correct their disproportionate representation among those experiencing homelessness. The SHS work plan identifies three housing stability goals:

1. Housing equity is advanced by providing access to services and housing for Black, Indigenous and people of color at greater rates than Black, Indigenous and people of color experiencing homelessness.
2. Housing equity is advanced with housing stability outcomes (retention rates) for Black, Indigenous and people of color that are equal or better than housing stability outcomes for non-Hispanic whites.
3. The disparate rate of Black, Indigenous and people of color experiencing chronic homelessness is significantly reduced.

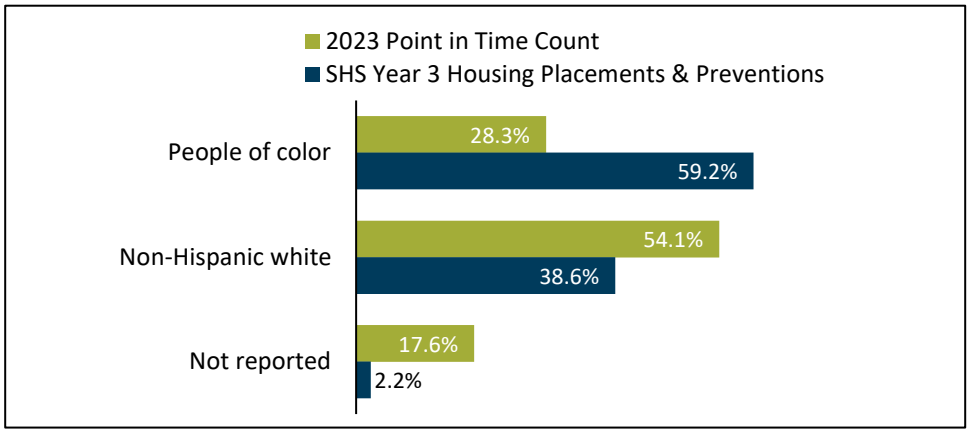
Progress toward housing stability goals

The charts in this section compare SHS race and ethnicity data with the 2023 point-in-time count, or PIT, to provide initial insights into how well SHS is achieving the regional housing stability goals. The PIT is used as a baseline for comparison because it is the only regionally consistent data for people experiencing homelessness that is currently available. However, the PIT has limitations as a baseline for measuring SHS progress. In particular, the PIT uses a definition of homelessness that is narrower than the definition used in SHS, and PIT data are based on a one-night snapshot whereas SHS data are annual. The refinement of the outcome metrics over the upcoming year will include the development of additional baseline and comparison data for measuring progress.

Goal 1: Housing equity is advanced by providing access to services and housing for Black, Indigenous and people of color at greater rates than Black, Indigenous and people of color experiencing homelessness.

The region's homeless population, as represented by the 2023 PIT, is 28.3 percent people of color while the population served by SHS-funded housing placements and homelessness preventions is 59.2 percent people of color.

Figure 2.1 Percentage people of color in regional homeless population compared with people served by SHS housing placements and homelessness preventions



Goal 2: Housing equity is advanced with housing stability outcomes (retention rates) for Black, Indigenous and people of color that are equal or better than housing stability outcomes for non-Hispanic whites.

Housing retention rates for people of color in SHS-funded permanent supportive housing and rapid rehousing are equal or better than the retention rates for non-Hispanic whites.

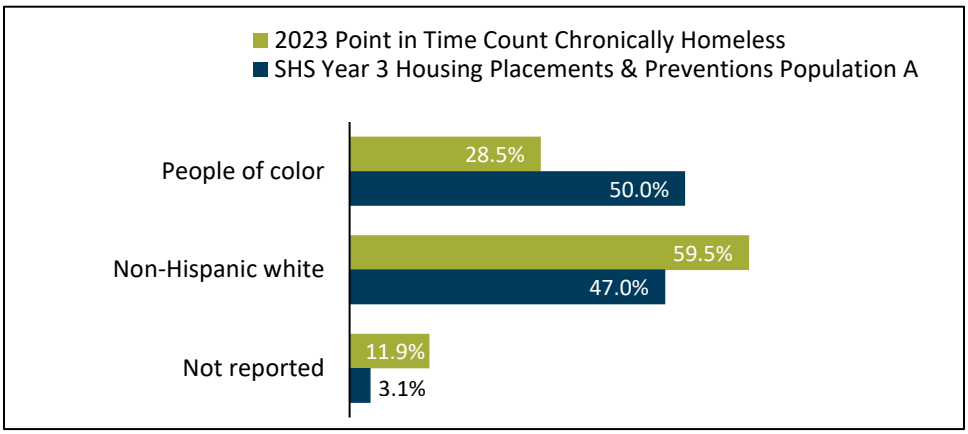
Figure 2.2 Retention rates for people of color compared with non-Hispanic whites

Average regional 12 month retention rate	Permanent supportive housing	Rapid rehousing
Asian or Asian American	95%	86%
Black, African American or African	96%	85%
Hispanic or Latina/e/o	94%	85%
American Indian, Alaska Native or Indigenous	92%	91%
Native Hawaiian or Pacific Islander	93%	83%
Non-Hispanic white	92%	83%

Goal 3: The disparate rate of Black, Indigenous and people of color experiencing chronic homelessness is significantly reduced.

The region's chronically homeless population is 28.5 percent people of color while the chronically homeless population served by SHS-funded housing placements and preventions is 50.0 percent people of color. This suggests that over time the disparate rate of people of color experiencing chronic homelessness will be reduced as disproportionately higher percentages of chronically homeless people of color are placed in permanent housing.

Figure 2.3 Percentage people of color in regional chronically homeless population compared with people served in SHS Population A



Equitable service delivery

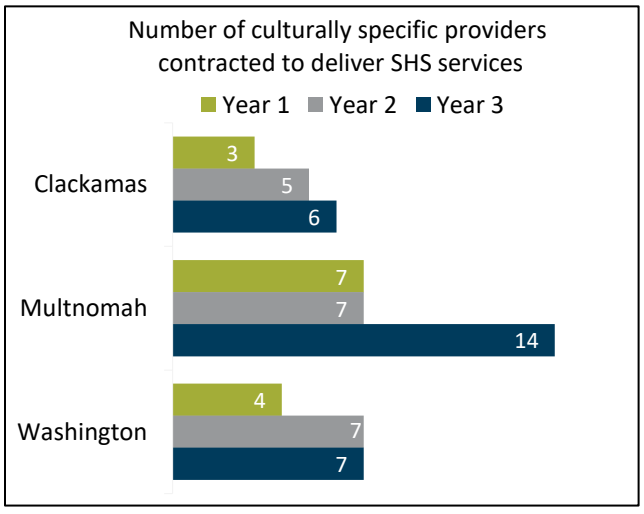
The SHS work plan identifies two goals related to equitable service delivery:

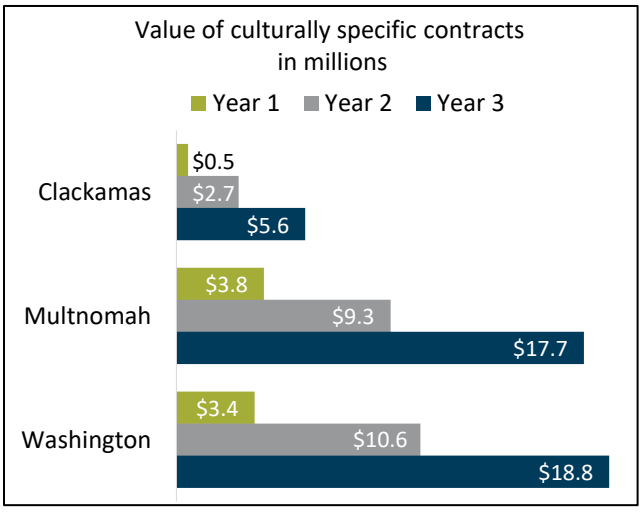
1. Increase culturally specific organization capacity with increased investments and expanded organizational reach for culturally specific organizations and programs.
2. All supportive housing services providers work to build anti-racist, gender-affirming systems with regionally established, culturally responsive policies, standards and technical assistance.

Progress toward equitable service delivery goals

Other sections of the report provide detailed information about how counties are working to advance both of these goals. One key metric is the expansion of investments in culturally specific organizations over the fund's first three years. The counties' contracts with culturally specific providers nearly doubled between years one and three, and the total value of their contracts was more than five times greater in year three than year one.

Figure 2.4 Investments in culturally specific providers in the first three years of SHS implementation





Engagement and decision making

The SHS work plan identifies two goals related to engagement and decision making:

1. Black, Indigenous and people of color are overrepresented on all decision-making and advisory bodies.
2. Black, Indigenous and people of color and people with lived experience are engaged disproportionately to inform program design and decision making.

Progress toward engagement and decision making goals

All three counties have multiple advisory bodies that provide guidance on their SHS work, with significant representation from people of color and people with lived experience of housing instability or homelessness. The following table provides some illustrative examples.

Figure 2.5 Representation of people of color and people with lived experience in advisory bodies

County	Advisory body	People of color	Lived experience
Clackamas	CHA Core Team	45%	73%
Clackamas	CoC Steering Committee	29%	29%
Multnomah	SHS Advisory Committee	75%	75%
Multnomah	JOHS Equity Advisory Committee	92%	92%
Washington	Homeless Solutions Advisory Council	45%	20%

Permanent supportive housing

The SHS work plan prioritizes solutions for people with disabilities experiencing prolonged homelessness (generally defined as 12 or more months of literal homelessness over three years) through investments in permanent supportive housing, or PSH, which combines long-term rent subsidies with ongoing supportive services to help people achieve housing stability.

In addition to tracking progress on the work plan's regional goals, an important measure of SHS progress to date is the number of permanent supportive housing units created with SHS funding in comparison to the overall need.

In the first three years of implementation, SHS-funded services and rent subsidies supported 4,055 units of permanent supportive housing. This includes project-based units in designated affordable housing buildings as well as tenant-based units that provide rent assistance that can be used in the private rental market. Each of these new units represents an ongoing, year over year investment in SHS-funded rent subsidies and supportive services for households living in the unit into the future.

Figure 2.6 Permanent supportive housing units created with SHS funding

	Clackamas County	Multnomah County	Washington County	Regional total
SHS-funded PSH units added since July 1, 2021	930	1,515	1,610	4,055
SHS-funded PSH units added in year three	412	308	286	1,006

Once they are fully leased up, these 4,055 new units will be able to house 59 percent of the households that were estimated to be in need of permanent supportive housing in 2021 when SHS first launched. However, the total number of households in need of permanent supportive housing across the region has continued to grow since SHS funding began, despite thousands of SHS-funded housing placements over the past three years. Based on the counties' year three estimates, the 4,055 units will be able to meet 49 percent of the current estimated need.

Figure 2.7 Estimated number of households in need of permanent supportive housing

	Clackamas County	Multnomah County	Washington County	Regional total
Households in need of PSH in 2021 (baseline)	997	4,936	885	6,818
Households in need of PSH in year three	1,158	4,852	2,230	8,240

These data demonstrate that while SHS has successfully achieved a significant increase in the region's permanent supportive housing capacity, broader systemic factors are continuing to push more people into homelessness. The counties' inflow and outflow data for year three indicate that for every 10 households that exit the region's homeless services system to permanent housing, approximately 15 households enter the system.

Figure 2.8 Average number of households entering and exiting homeless services system per month

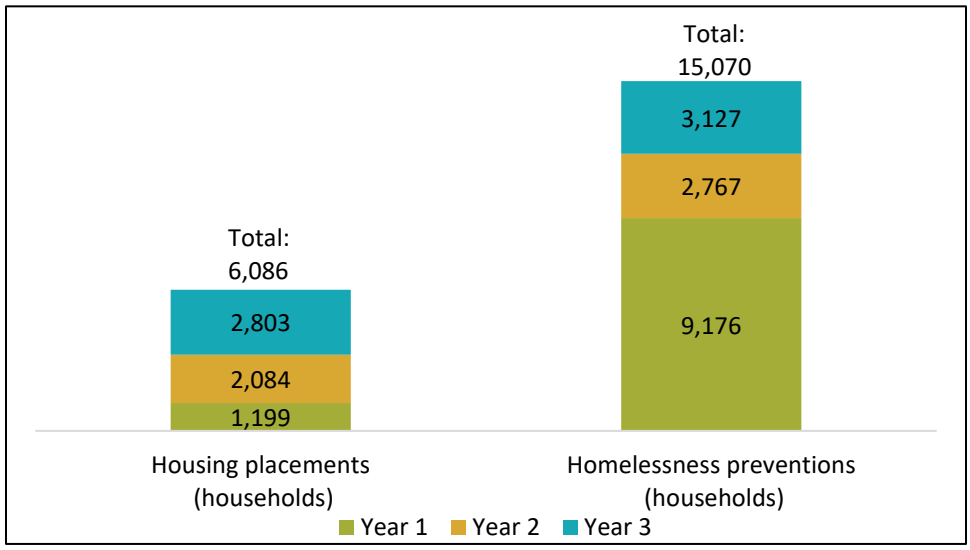
	Clackamas County	Multnomah County	Washington County	Regional total
Average monthly inflow	419	554	711	1,684
Average monthly outflow	140	419	567	1,126

This dynamic highlights the complexity of measuring progress in achieving the SHS fund's 10-year goals and makes clear that SHS investments alone will not be enough to end the crisis of homelessness in our region.

HOUSING AND SERVICES

Over the first three years of implementation, SHS-funded programs placed 6,086 households (9,817 people) experiencing or at risk of homelessness in permanent housing and prevented 15,070 households (23,902 people) from losing their housing. In year three, SHS funding supported new housing placements for 2,803 households (4,775 people), prevented 3,127 households (7,520 people) from losing their homes, and provided continued support with rent assistance and housing retention services for most of the 3,283 households (5,042 people) placed in housing during the previous two years.

Figure 3.1 Housing placements and homelessness preventions in years 1-3



Housing placements listed for each year represent new placements.

This section provides detailed data on SHS-funded housing placements, homelessness preventions and other services in year three, including housing retention, emergency shelter and outreach.

Housing placements

SHS-funded programs connect people experiencing homelessness with permanent housing through services that are voluntary and tailored to meet each person's specific situation and needs and typically include:

- Assessment of housing barriers, needs and preferences
- Support and flexible funds to address immediate housing barriers
- Housing search assistance including landlord outreach and engagement
- Assistance preparing housing applications, filing appeals and advocating with landlords
- Support with application fees, security deposits and other move-in costs
- Rent assistance or placement in subsidized affordable units
- Case management and connections to wraparound services as needed to support housing stability and retention
- Partnerships and linkages with healthcare, mental health and recovery support services to meet each participant's needs

People with a disability who have experienced prolonged homelessness are placed in permanent supportive housing, which provides long-term housing assistance paired with intensive services to support housing stability. People who have more recently become homeless are typically served through rapid rehousing, which provides short- and medium-term rent assistance (typically up to two years) combined with housing navigation and supportive services. Some counties also offer other types of placements for households needing housing subsidies without ongoing supportive services.

SHS-funded programs supported new housing placements for 2,803 households (4,775 people) in year three. This includes 1,253 households (2,028 people) placed in permanent supportive housing, 1,347 households (2,503 people) served through rapid rehousing programs and a small number of placements in other types of permanent housing.

Figure 3.2 Total housing placements in year three

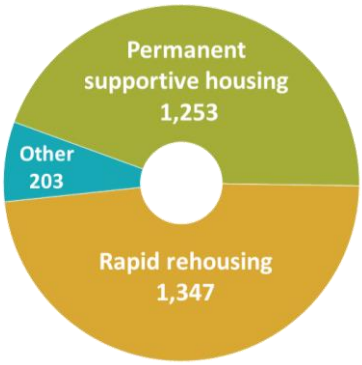


Figure 3.3 Permanent supportive housing placements in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Households placed in PSH in year three	412	442	399	1,253
People placed in PSH in year three	775	574	679	2,028

Figure 3.4 Rapid rehousing placements in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Households placed in rapid rehousing in year three	196	910	241	1,347
People placed in rapid rehousing in year three	472	1,510	521	2,503

Figure 3.5 Other permanent housing placements in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Households placed in other housing in year three	0	197	6	203
People placed in other housing in year three	0	238	6	244

Regional long-term rent assistance

A key strategy in the counties' housing placements is SHS-funded regional long-term rent assistance, or RLRA, which provides tenant-based vouchers that participants can use to rent housing in the open market as well as project-based subsidies that attach the rental voucher to a specific unit. Participants pay 28.5 percent of their income toward the rent and the remaining amount is covered by the program. RLRA primarily serves participants in permanent supportive housing, and participants in other types of housing programs are also eligible.

Over the first three years of implementation, 3,132 households (5,179 people) were housed using RLRA. In year three, 1,216 RLRA vouchers were issued and 1,180 households newly leased up using an RLRA voucher. A total of 2,854 households were in housing using an RLRA voucher, including those housed in previous years who remained in their homes.

Figure 3.6 Regional long-term rent assistance (a subset of housing placements)

	Clackamas County	Multnomah County	Washington County	Regional total
RLRA vouchers issued in year three	370	453	393	1,216
Households newly leased up using RLRA in year three	358	428	394	1,180
Total households in housing using RLRA in year three	766	826	1,262	2,854

Housing retention

Once households are placed in permanent housing, SHS funding continues to provide rent assistance and case management as needed to support housing retention and stability. For households placed in permanent supportive housing, these supports are available long term. For households served in rapid rehousing programs, these supports are typically available for up to two years.

Housing retention rates measure the percentage of households who remain housed 12 months after receiving SHS-funded assistance. In year three, an average of 92 percent of permanent supportive housing placements remained housed 12 months after move-in, demonstrating that SHS investments in rent assistance and housing retention services are working to end people's homelessness and keep them stably housed.

Retention rates for rapid rehousing were somewhat lower, but still in line with the regional goal of 85 percent. Given that rapid rehousing is a less intensive and more time-limited intervention, a lower retention rate is to be expected.

Figure 3.7 Retention rates

	Clackamas County	Multnomah County	Washington County	Regional average
Permanent supportive housing	96%	89%	92%	92%
Rapid rehousing	93%	85%	81%	86%

Returns to homelessness

Another metric for tracking housing stability is returns to homelessness, which measures the percentage of households exiting the homeless services system to a permanent housing destination who returned to the homeless services system within 24 months of exit. Rates of returns to homelessness for SHS-funded housing programs range from 6 to 19 percent with a regional average of 13 percent.

Figure 3.8 Returns to homelessness

	Clackamas County	Multnomah County	Washington County	Regional average
% of exits to permanent housing that returned to homeless service system	6%	19%	15%	13%

Homelessness prevention

In addition to supporting housing placement and retention for people experiencing homelessness, counties use SHS funds to prevent thousands of additional households from losing their homes. Prevention services help people at risk of homelessness stay housed through short-term rent assistance, resource referral and system navigation, legal supports, landlord-tenant mediation and connections to other resources. Homelessness prevention is a critical investment because it is much more difficult and expensive to rehouse people once they have lost their homes than to support them to remain in their housing.

In year three, SHS funding supported homelessness prevention services that helped to keep 3,127 households (7,520 people) in their homes.

Figure 3.9 Homelessness preventions in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Households supported with prevention services	1,228	334	1,565	3,127
People supported with prevention services	2,679	398	4,443	7,520

Emergency shelter

SHS funding supports a range of emergency shelter options to provide households experiencing homelessness with interim stability and support along with connections to services. In year three, counties used SHS funds to create and sustain a mix of shelter models including congregate, facility-based and alternative shelters such as motels, villages and pods. These shelters serve adults, families and youth, with some shelters focused on specific populations such as domestic violence survivors, adults with behavioral health needs, veterans and medically fragile individuals.

In year three, SHS funds created or sustained a total of 1,430 emergency shelter beds/units. This includes new capacity that has been added as well as existing capacity that has been turned into permanent capacity with SHS funding. A total of 2,698 households (3,828 people) were served in SHS-funded shelters in year three.

Figure 3.10 Emergency shelter in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Beds/units created or sustained in year three	210	800	420	1,430
Households served in SHS-funded shelter in year three	460	871	1,367	2,698
People served in SHS-funded shelter in year three	824	1,160	1,844	3,828

Congregate shelters are counted by the number of beds. Non-congregate shelters, such as motel-based shelters or pods, are counted by the number of units, even though one unit may serve multiple people.

Street outreach

The counties have built comprehensive outreach programs to connect people on the streets with SHS-funded shelter and housing services. In Clackamas County, six organizations conducted regular outreach in year three, contacting a total of 502 households. In Multnomah County, SHS funding supported outreach teams in 17 organizations with a total capacity to engage 1,375 households in year three. In Washington County, 10 organizations conducted geographically designated and population-specific outreach in year three, serving a total of 1,061 households.

Outreach workers visit encampments, address immediate survival needs, work to build trusting relationships with the people they engage, conduct coordinated entry assessments, and facilitate referrals to housing and services. The counties' outreach teams include culturally specific providers, mental health and substance use disorder specialists, and organizations with other specialized areas of expertise to connect people with services that meet their specific needs. Counties also fund in-reach and mobile screenings to engage people in shelters and service sites with housing-focused services. All three counties are working with the evidence-based Built for Zero initiative to develop by-name lists to track the people they engage and support their connections to housing and services.

In addition to street outreach, in year three counties also invested SHS funding in service centers that provide entry points for people experiencing homelessness to access services. Clackamas County committed funding for the development of a resource center that will provide meals, access to coordinated entry assessments, dedicated on-site spaces for providers and connections to a range of other supports. In Multnomah County, SHS funding helped to sustain and expand existing day center and drop-in services that include meals, survival outreach, affinity spaces and connections to services. Washington County invested SHS funding to develop two access centers which will provide meals, storage, showers, and connections to housing and services.

POPULATIONS SERVED

The SHS fund prioritizes services for people with disabilities experiencing prolonged homelessness and for communities of color who are disproportionately impacted by homelessness and housing instability. This section provides more information about the people served by SHS-funded housing placements and preventions in year three.

Populations A and B

SHS-funded programs serve two primary populations: Population A – defined as people who have experienced or are at imminent risk of experiencing long-term or frequent episodes of literal homelessness, have at least one disability and little to no income, and Population B – defined as people who are experiencing homelessness or have substantial risk of experiencing homelessness.

Metro and the counties are engaged in ongoing work to achieve regional alignment in Population A and B definitions, data collection, categorization and reporting. However, discrepancies still exist between the counties' Population A and B data. The data in this section offer initial insights into the populations served by SHS housing placements and preventions based on counties' year three annual reports.

An average of 81 percent of households placed in permanent supportive housing in year three were in Population A and 19 percent were in Population B. For rapid rehousing, an average of 62 percent were in Population A and 38 percent were in Population B. Households served in homelessness prevention programs were almost all in Population B with a small percentage (6 percent) in Population A.

Figure 4.1 Percentage of households in Population A and B in year three housing placements and homelessness preventions

	Clackamas County[1]		Multnomah County		Washington County		Regional average	
	Pop A	Pop B	Pop A	Pop B	Pop A	Pop B	Pop A	Pop B
Permanent supportive housing	74%	26%	81%	19%	87%	13%	81%	19%
Rapid rehousing	74%	26%	56%	44%	55%	45%	62%	38%
Preventions	0%	100%	13%	87%	6%	94%	6%	94%

Length of time homeless

The measurement of a household's length of time homeless is based on the period of time between when the household's current episode of homelessness started and their housing move-in date. Households served in SHS-funded programs in year three had an average length of time homeless of 3.66 years. (It is important to note that this figure masks

[1] Clackamas County's Population A and B data for rapid rehousing and preventions are extrapolations due to incomplete data.

variations by subpopulations; the average length of time homeless for families with children, for example, is typically much shorter than for single adults.)

Figure 4.2 Average length of time homeless for households served in SHS programs in year three

	Clackamas County	Multnomah County	Washington County	Regional average
Average years homeless	4.06	4.24	2.69	3.66

Race and ethnicity

A key SHS regional goal is to provide access to services and housing for people of color at greater rates than people of color experiencing homelessness. All SHS-funded programs are required to collect and report on disaggregated race and ethnicity data to allow counties to track whether this goal is being met. Counties are also required to conduct annual racial equity analyses of the data.

This section provides race and ethnicity data for SHS-funded permanent supportive housing placements, rapid rehousing placements and homelessness preventions in year three. The *Progress Toward 10-Year Goals* section provides a regional analysis of these data showing that SHS-funded programs are serving people of color at greater rates than people of color experiencing homelessness. The *Progress in Advancing Racial Equity* section summarizes each county's detailed analysis of the data, demonstrating that, on the whole, populations of color are accessing SHS-funded services at higher rates than their representation in each county's homeless population.

Across the region, 51 percent of people placed in permanent supportive housing, 58 percent of people placed in rapid rehousing, and 62 percent of people served by SHS-funded homelessness preventions were people of color. The percentages vary by county, with Multnomah County serving the highest percentages of people of color in permanent supportive housing and rapid rehousing, and Washington County serving the highest percentages of people of color in preventions.

Figure 4.3 Race and ethnicity of people placed in permanent supportive housing in year three

	Clackamas County	Multnomah County	Washington County	Regional total
People of color	49%	66%	42%	51%
Asian or Asian American	2%	3%	2%	2%
Black, African American or African	12%	34%	13%	18%
Hispanic or Latina/e/o	19%	17%	24%	20%
American Indian, Alaska Native or Indigenous	5%	21%	7%	10%
Native Hawaiian or Pacific Islander	4%	4%	5%	4%
Middle Eastern or North African	0%	<1%	1%	<1%

White	66%	44%	67%	60%
Non-Hispanic White (subset of White category)	49%	31%	56%	46%
Data not reported	2%	3%	3%	2%

Figure 4.4 Race and ethnicity of people placed in rapid rehousing in year three

	Clackamas County	Multnomah County	Washington County	Regional total
People of color	49%	64%	52%	58%
Asian or Asian American	1%	3%	2%	3%
Black, African American or African	10%	34%	10%	24%
Hispanic or Latina/e/o	30%	20%	40%	26%
American Indian, Alaska Native or Indigenous	6%	8%	5%	7%
Native Hawaiian or Pacific Islander	6%	8%	5%	7%
Middle Eastern or North African	0%	<1%	0%	<1%
White	64%	43%	67%	52%
Non-Hispanic White (subset of White category)	47%	33%	45%	38%
Data not reported	4%	3%	3%	3%

Figure 4.5 Race and ethnicity of people served in homelessness preventions in year three

	Clackamas County	Multnomah County	Washington County	Regional total
People of color	58%	44%	65%	62%
Asian or Asian American	1%	2%	3%	2%
Black, African American or African	11%	29%	15%	14%
Hispanic or Latina/e/o	19%	9%	47%	35%
American Indian, Alaska Native or Indigenous	3%	6%	2%	3%
Native Hawaiian or Pacific Islander	3%	1%	4%	3%
Middle Eastern or North African	0%	1%	1%	<1%
White	74%	61%	62%	66%
Non-Hispanic White (subset of White category)	39%	53%	34%	37%
Data not reported	3%	4%	1%	2%

PROVIDER PARTNERSHIPS

The successful implementation of SHS programs relies on the on-the-ground work of more than a hundred nonprofit and community-based service providers across the region. Counties have focused significant time and resources to build a strong regional network of SHS providers, with a particular focus on engaging new partners and culturally specific organizations.

Procurement strategies

Since the launch of SHS funding, counties have implemented procurement and allocation processes to expand contracting opportunities for new and emerging providers, with an emphasis on culturally specific providers. In year three, the counties released procurements for new and expanded programs, including health and housing integration projects, permanent supportive housing, and capital procurements for resource centers and transitional housing.

Metro also led a regionwide procurement with the three counties to create a pre-approved list of vendors that can provide training and technical assistance to SHS-funded service providers. The procurement resulted in a list of 67 qualified providers in areas of expertise such as human resources support, housing and homeless services best practices, and racial equity and social justice. Metro and the counties will be able to draw upon this bench of expertise to support provider capacity building in the coming years.

Service provider contracts

Counties contracted with 103 nonprofit and community-based organizations to deliver SHS services in year three, with contracts totaling $234.4 million.

Figure 5.1 Service providers contracted to deliver SHS services in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Number of providers	26	70	24	103*
Total value of contracts	$33.6m	$138.5m	$62.2m	$234.4m

**Some providers contracted with more than one county. The regional total reflects the unduplicated number of providers.*

The contracted providers include small and emerging organizations that are new to the counties' networks as well as established providers that have leveraged SHS resources to scale up existing programs, expand into other service areas or serve other parts of the region. Six of the providers that contracted with Clackamas County and 15 that contracted with Multnomah County in year three were new to providing SHS services in those counties. Comprehensive lists of each county's contracted providers with details on their services, contract amounts and populations served are available in each county's year three annual report (see Exhibit E).

Culturally specific provider contracts

The counties expanded their partnerships with culturally specific providers in year three, contracting with 19 culturally specific organizations to deliver SHS-funded services, with contracts totaling $42.1 million. (Culturally specific provider contracts are a subset of the contracts with all service providers in the previous section.)

Figure 5.2 Culturally specific providers contracted to deliver SHS services in year three

	Clackamas County	Multnomah County	Washington County	Regional total
Number of culturally specific providers	6	14	7	19*
Total value of contracts	$5.6m	$17.7m	$18.8m	$42.1m

**Some providers contracted with more than one county. The regional total reflects the unduplicated number of providers.*

The counties' partnerships with and investments in culturally specific providers have expanded significantly over the three years of SHS implementation. The total number of culturally specific providers contracted to deliver SHS services doubled between years one and three, and the total value of their contracts was more than five times greater.

Each county's culturally specific provider contracts include organizations that specialize in delivering services to the following communities:

- Black/African American
- Latine
- Native American/Indigenous
- Immigrant and refugee
- Black, Indigenous and people of color

Multnomah County's culturally specific provider contracts also include organizations that specialize in serving the LGBTQIA2S+ community.

Culturally specific providers deliver a wide range of SHS-funded services:

- Clackamas County contracts with culturally specific partners to provide housing navigation, housing placement, supportive housing case management, shelter, rapid rehousing and outreach services.
- Washington County contracts with culturally specific providers to deliver housing case management services, rapid rehousing, housing liaison services, shelter, outreach and recuperative care services.
- Multnomah County contracts with culturally specific partners to provide permanent supportive housing, rapid rehousing, recovery housing, transitional housing, other permanent housing, short-term housing assistance, supportive services, landlord engagement, prevention, day services, shelter and outreach.

CAPACITY BUILDING

SHS implementation has required a historic expansion of the region's homeless service system infrastructure. Counties have had to strengthen their internal capacity to administer contracts and payments, manage data reporting and oversight, and support providers with implementation. Contracted providers have also had to scale up their staffing and administrative capacity to enable them to implement SHS-funded programs.

County infrastructure and capacity building

Counties continued their work in year three to build sustainable systems to support SHS implementation. This included increased staffing capacity, updates to coordinated entry systems, and improvements to data collection and reporting infrastructure.

- **Staffing capacity**: Clackamas County continued to add staff capacity in year three, including new data analysts and a dedicated equity and engagement coordinator. Multnomah County added staff in key areas such as finance, programs, data and evaluation. Washington County expanded its staff capacity in areas including contract monitoring, finance and accounting. All three counties also used SHS regional investment fund resources to invest in staff focused on supporting health and housing system integration and regional coordination.
- **Coordinated entry:** Clackamas County continued to make improvements to its coordinated entry system to expand hours, increase capacity and improve equitable access. Key changes in year three included increased access to bilingual/bicultural staff and improved working relationships with community partners, including culturally specific organizations. Multnomah County completed a multi-year redesign of its coordinated access tool in year three to be more trauma-informed, aligned with local priorities and promote equitable access to services. The improvements were informed by feedback from key partners, including people with lived experience of homelessness and providers. Washington County continued to conduct a bi-annual assessment of its coordinated entry system to ensure its phased approach results in more equitable access to housing programs. All three counties also worked with the tri-county planning body to explore opportunities to align coordinated entry at a regional level.
- **Data systems:** Clackamas County continued to expand its data capacity in year three, adding staff to support data collection, system evaluation and improvement. The county also organized ongoing technical assistance and training for providers to support their data quality and capacity. Multnomah County became the lead agency for the regional Homeless Management Information System and worked with the other counties to regionalize HMIS policies and procedures and align metrics. Multnomah County also developed an HMIS learning management platform to train providers on HMIS data entry and provided technical support through data quality monitoring and follow up. Washington County funded 19 quality assurance positions in contracted partner organizations to support financial operations, data quality and other organizational capacity needs. All three counties also continued their

participation in the national Built for Zero initiative, which works with communities to end homelessness by strengthening data-driven systems.

Provider capacity building

The counties increased their capacity building supports to providers in year three, funding technical assistance, training and capacity building grants. For example:

- Clackamas County allocated $1.0 million per year for technical assistance to support service providers' capacity building in human resources, fiscal business services, strategic planning, program design and implementation, and policies and procedures. The technical assistance was utilized by four service providers in year three, two of which are culturally specific. The county added $1.9 million to five service providers' budgets, including two culturally specific providers, to support internal capacity building. The county also provided trainings and presentations for all contracted providers to share best practices and promote consistent approaches.
- Multnomah County partnered with the United Way to distribute $10 million in flexible grants to 61 contracted organizations to support organizational health activities such as training opportunities, professional development and employee retention. The county invested in provider training and launched provider conferences to support opportunities for networking, information sharing, collaborative problem solving and shared learning. The county also piloted system development grants in year three to support capacity building for 11 new and emerging culturally specific providers that qualified to contract with the county to provide SHS-funded services.
- Washington County allocated $235,000 in technical assistance funding to eight agencies in year three. It also provided a total of $1.7 million in capacity building project funding to 14 agencies, supporting projects focused on business services, human resources, strategic planning, policies and procedures, program design and evaluation. All of the county's culturally specific partner agencies have been awarded technical assistance and/or capacity building project funding. The county also provided a catalog of equity-focused trainings for providers in year three, with all partner agencies participating in at least one training.

At a regional level, Metro and the tri-county planning body have been working with the counties to develop additional trainings and technical assistance to support provider capacity building. A Metro-led tri-county procurement resulted in a list of 67 qualified vendors that will provide the basis for regional technical assistance work in the coming years. Research and planning are underway to develop a baseline of trainings, skill sets and learning outcomes to support incoming frontline housing and homeless services workers. A technical assistance demonstration project focused on permanent supportive housing is also under development.

Contract administration

The counties continued to make improvements to contract administration practices to address challenges identified in previous years. These challenges included county delays

in contract implementation and payments as well as cumbersome accounting requirements and financial procedures. Many providers were also challenged by the counties' reimbursement-based contracting model which requires providers to front the funding for program costs and then receive reimbursement, creating cash flow issues for smaller and emerging organizations.

Improvements in year three included:

- Clackamas County implemented a new invoicing workbook tool to assist providers and county staff in monitoring invoices and budget spend-down, an improvement that resulted in 82 percent of invoices processed within 30 days of receipt. The county also developed a new payment model that offers contracted providers a two-month advance of their annual budget to reduce financial strain as providers await monthly reimbursement.
- Multnomah County made improvements to its contract management and invoicing processes in year three that resulted in about 94 percent of invoices paid within their contract's payment terms. The changes included improved internal review and approval processes, clearer guidance on reimbursement requirements, and implementing internal tracking tools. The county also piloted an advanced payment model that provides limited advance payments on a case-by-case basis to support providers with cash flow challenges created by the county's reimbursement-based payment system.
- Washington County created multi-service contracts to reduce contract preparation and tracking for all parties and alleviate the burden for providers to manage multiple contracts. It conducted performance evaluations to inform contracting decisions for year four, with multi-year contracts awarded for high-performing organizations. The county also streamlined its invoicing system through process improvements, invoice automation and an expanded finance and accounting team, reducing average invoice processing time to 18 days.

Workforce recruitment and retention

Workforce challenges have imposed significant constraints on provider capacity as contracted providers have struggled to recruit and retain the staff necessary to launch new SHS-funded programs and expand existing services. These challenges are rooted in regional workforce shortages and exacerbated by inadequate wages and staff burnout.

Metro and the counties are working with the tri-county planning body to develop regional standards to achieve livable wages for direct service staff. A tri-county workgroup will draft a plan for SHS oversight committee approval in 2025 informed by ongoing outreach and engagement with providers as well as local and state workforce and contracting initiatives.

Each county also implemented strategies to address workforce challenges in year three. For example:

- Clackamas County staff conducted reviews of wages across all SHS contracts to determine pay ranges for specific classifications and used this data to inform contract negotiations. The county used contract negotiations to encourage service partners to increase compensation to competitive rates. The county also allocated SHS funding for mental health support services for frontline staff.
- Based on research and feedback from providers, Multnomah County increased service caps for permanent supportive housing services from $10,000 per household to $15,000 per household, with an even higher cap of $17,500 for some programs, including those provided by culturally specific organizations. This change will allow providers to increase wages and adjust staffing ratios for frontline staff. The county is also modifying some longtime service contracts to increase funding levels to support higher wages for staff.
- Washington County used its annual performance evaluation process to explore differences in pay equity between culturally specific and non-culturally specific providers as well as any unique challenges faced by culturally specific organizations. The review found that average salaries were higher for culturally specific providers for each SHS-funded position reviewed, including direct service, administrative and management roles.

Counties conduct annual wage equity surveys of contracted providers to inform their workforce and wage equity strategies. The chart below provides a high-level summary of the survey findings from year three, showing the average salaries for direct service roles and the range of average salaries by position for all roles in provider organizations. The counties' annual reports provide detailed data tables, charts and analysis from the surveys.

Figure 6.1 Wage equity survey results

	Clackamas County	Multnomah County	Washington County
Average annual salary for direct service roles	$55,000-$65,000	$53,460-$57,464	$44,793-$53,919
Distribution of average annual salary by position for all roles	$55,000-$90,000	$53,460-$120,282	$44,793-$116,903

Evaluation and performance improvement

All three counties strengthened contract monitoring and performance evaluation processes in year three to support accountability and inform continuous improvement. For example:

- Clackamas County implemented a contract check-in tool to facilitate data-driven, outcomes-based discussions with providers and support performance improvement. Key metrics tracked include contract fulfillment, individuals and households served, referral responsiveness, timely invoicing, spend-down rate and data quality. The county also developed a tool for conducting file monitoring in year four to gain insight

into providers' file management practices, identify best practices and highlight areas for improvement.

- Multnomah County made extensive improvements to SHS contract monitoring in year three, implementing contract monitoring measures such as internal tracking tools, annual risk assessments, annual performance reviews and on-site monitoring when necessary, with results provided to partners. The Department of County Management recommended the new contract monitoring system as a model for contract management countywide.
- Washington County conducted its second annual provider performance evaluations to support quality improvement and capacity building. The process assessed service providers' performance, collected organizational information, and gave providers the opportunity to comment on any challenges faced in fulfilling contractual obligations. The county also designed and piloted a new monitoring framework that includes a review of policies and procedures, assessing how partners are delivering culturally responsive services, and a review of compliance with program standards.

SHS funding also supported assessment and evaluation projects in year three that will inform future programming. For example, Clackamas County launched engagement and planning processes to enhance its response to family homelessness and address housing insecurity and homelessness in rural parts of the county. Multnomah County conducted a geographic equity study, an analysis of factors that led people to successfully exit homelessness, a qualitative analysis of effective alternative shelter programs, and an evaluation of best practices in providing emergency shelter.

CROSS-SECTOR WORK

Homelessness is a complex issue requiring coordination among multiple systems of care. Cross-sector partnerships and service integration are key to building an effective regional homelessness response infrastructure. Counties have used SHS funding to implement cross-sector initiatives in partnership with behavioral health, healthcare, law enforcement, community corrections, workforce, housing and other systems.

Integration of health and behavioral health services into SHS programming

Alignment with health and behavioral health systems is a key priority for SHS implementation. The following examples demonstrate the range of ways that counties worked to integrate health and behavioral health services into SHS programming in year three:

- Clackamas County's SHS funding supports two behavioral health case managers who assist people who require higher levels of behavioral health support to find and remain in permanent housing. Increased internal coordination between the county's SHS program and Public Health and Behavioral Health divisions has also resulted in new programs such as medical respite and a community paramedic pilot. The county also invested SHS funds in year three to develop a recovery-oriented transitional housing program that will open in 2025.
- Multnomah County's SHS funding supports a dedicated housing specialist to help participants in the county's behavioral health programs secure housing that meets their needs. The county has paired 175 regional long-term rent assistance vouchers with intensive case management for people with behavioral health challenges. The county also committed SHS revenue in year three to support 89 new beds of recovery-oriented housing and a new stabilization and treatment program.
- Washington County partners with hospitals and health systems to connect participants experiencing homelessness to healthcare services through healthcare case conferencing. The county launched a medical respite pilot in year three to help people discharged from hospitals needing additional medical care to stabilize in shelter while working toward stable housing. The county also allocated SHS resources toward capital funding for transitional housing in year three, prioritizing projects that will provide on-site behavioral health services to support people in their transitions to recovery.
- At a regional level, the counties are working with the tri-county planning body to draft a regional implementation plan to strengthen alignment and partnerships with healthcare systems. The plan will focus on regional opportunities to support, supplement and advance existing health and housing system alignment initiatives. Metro and the counties are also working with other partners to plan implementation of the Medicaid 1115 Demonstration Waiver, which allows certain housing services to be covered by Medicaid.

Integration of SHS with the Metro affordable housing bond

Another key example of SHS cross-sector work is the alignment between SHS funding and the Metro affordable housing bond. The opportunity to align SHS-funded services and rent assistance with bond-funded capital investments significantly expands the region's ability to develop permanent supportive housing for people experiencing prolonged homelessness.

Across the three counties, SHS-funded supportive services and rent assistance have been integrated with bond-funded capital investments to create a total of 348 permanent supportive housing units in bond-funded projects.

Figure 7.1 PSH units created by integrating SHS-funded services and rent assistance with Metro housing bond capital funding

	Clackamas County	Multnomah County	Washington County	Regional total
Since July 1, 2021	231	47	70	348
Added in year three	115	12	6	133

Units added in year three include:

- Good Shepherd Village (Happy Valley): a 143-unit project with 58 designated PSH units and services provided by Catholic Charities.
- Las Flores (Oregon City): a 171-unit complex with 17 designated PSH units, nine which are reserved for families with services provided by Northwest Housing Alternatives and eight which are reserved for veterans.
- Mercy Greenbrae (Lake Oswego): a 100-unit property with 40 designated PSH units and services provided by Mercy Housing.
- Powellhurst Place (Portland): a 65-unit project with 12 designated PSH units and services provided by Native American Rehabilitation Association of the Northwest.
- Viewfinder (Tigard): an 81-unit project with six dedicated project-based PSH units added in year three and services provided by Project Homeless Connect.

Other examples of cross-sector partnerships and programming

SHS funding supported partnerships with a range of other sectors in year three, including workforce, intellectual and developmental disabilities, and community justice. The examples highlighted in this section demonstrate the scope and breadth of this cross-sector work.

- Clackamas County's SHS team partnered with county workforce programs to help case managers and housing navigators connect housed participants to employment services. The county's Children, Family and Community Connections Division also provided employment and training services to participants housed through SHS programs.

- Multnomah County's SHS team partnered with the county's Intellectual and Developmental Disabilities Services Division to improve access to permanent housing for people with disabilities who are also experiencing homelessness. This includes providing access to SHS-funded regional long-term rent assistance paired with case management services to support housing placement and stability for participants.
- Multnomah County's Department of Community Justice implemented an SHS-funded program to help house people who are justice involved and are experiencing or at risk of homelessness. The program supports long-term housing stability by connecting participants with tenant-based regional long-term rent assistance as well as project-based permanent supportive housing.
- Washington County's Housing Liaison program embeds trained housing system navigators in other divisions and departments, working side by side with staff in behavioral health, child and maternal health and community corrections to help their participants identify housing options available in the community and navigate the county's homeless services system.
- Washington County partnered with Worksystems, Open Door Housing Works, Portland Community College and Immigrant and Refugee Community Organization to implement a Housing Careers Program that trains and supports people with lived experience of housing instability or homelessness to enter careers in housing and other fields.

REGIONAL COORDINATION

The SHS fund has created an unprecedented level of regional collaboration across jurisdictional partners to address homelessness. The counties and Metro work closely together to align SHS programs and systems. The tri-county planning body, or TCPB, leads the development of strategies that leverage regionalism to increase the SHS fund's effectiveness.

Tri-county planning body

The TCPB is charged with setting regional goals, strategies and outcome metrics related to addressing homelessness in the region. Five percent of SHS funds are reserved for a regional investment fund designed to support the counties and Metro in achieving SHS alignment, coordination and outcomes at a regional level. The TCPB guides the fund's investments and supports coordination on solutions to regional challenges.

The TCPB has identified six goals designed to strengthen SHS implementation through regional solutions:

- **Coordinated entry:** Assess opportunities for regional coordination to make coordinated entry more accessible, equitable and efficient for staff and clients
- **Landlord recruitment:** Identify areas where regionalization can increase the availability of readily accessible and appropriate housing units for service providers
- **Healthcare system alignment:** Promote greater alignment and long-term partnerships with healthcare systems that meaningfully benefit people experiencing homelessness and the systems that serve them
- **Training:** Support regional training that provides service providers with access to the knowledge and skills required to operate at a high level of program functionality, prioritizing the needs of culturally specific providers
- **Technical assistance:** Support regional technical assistance and capacity building investments to ensure organizations have the support required to operate at a high level of functionality, prioritizing culturally specific providers
- **Employee recruitment and retention:** Establish regional standards for county contracts with SHS-funded agencies and providers to achieve livable wages for direct service staff

The TCPB is working with Metro, the counties and other partners to develop implementation strategies for each of these goals in coordination with the SHS oversight committee. In year three, the oversight committee approved the first completed set of implementation strategies to advance the regional landlord recruitment goal. The plan directs $8 million of regional investment fund expenditures to support a menu of interventions to increase participation from landlords in housing programs, including outreach materials, additional policy workgroup spaces and studies, pilot approaches and the RLRA Risk Mitigation Program. A workgroup of staff from Metro and the counties has been meeting monthly to coordinate this work, including finalizing reporting and metrics.

Work is underway to complete implementation strategies for the remaining TCPB goals for approval by the end of year four.

Health and housing integration

As noted in the previous section, Metro and the counties have been working with other partners to plan implementation of the Medicaid 1115 Demonstration Waiver, which allows certain housing services to be covered by Medicaid. As part of this effort, the counties worked with Trillium and Health Share to establish network hubs, which will allow counties to receive referrals for Medicaid-funded housing services, including up to six months of rent and utilities, home modification and remediation, and tenancy support through case management.

In alignment with the TCPB's healthcare system alignment goal, counties used regional investment fund resources to invest in staff positions to support health and housing system integration and regional coordination. These positions are supporting Medicaid 1115 Demonstration Waiver coordination and implementation, partnerships with coordinated care organizations and healthcare partners, and the establishment of regionalized best practices for housing and healthcare integration.

Regional data systems and standards

Metro and the counties worked together in year three to further align regional data collection and reporting. This included refining the quarterly and annual report templates and developing clearer definitions and shared methodologies for reporting on key data metrics. Progress was also made in moving forward a data sharing agreement that will support regional analysis and evaluation.

Continued work to align definitions and strengthen data reporting is ongoing, with a priority focus on developing consistent definitions and methodologies for reporting on permanent supportive housing and Populations A and B. Further work is also planned to refine regional outcome metrics and develop a framework of baseline and comparison data for assessing progress toward regional goals.

In March 2024, Multnomah County became the central administrator of the region's Homeless Management Information System, or HMIS. To facilitate this transition, the counties' data teams coordinated closely to regionalize HMIS policies and procedures and update intergovernmental agreements. Data teams and analysts from the three counties also met on a monthly basis to exchange information about metric operationalization and alignment, discuss best practices and coordinate.

Regional long-term rent assistance

A workgroup with representatives from the counties and Metro has been meeting monthly since 2021 to develop regional policies and guidelines for the SHS-funded regional long-term rent assistance program. A regional data team also meets regularly to develop coordinated data collection and reporting tools and methodologies for the

program. The regional workgroup reviews and analyzes tri-county data reports on a quarterly basis to monitor progress and identify areas for improvement. The workgroup also engages in shared learning and problem solving, the development of shared procedures and templates, and identifies updates to the regional policy framework to support effective implementation.

Best practices and shared learning

The three counties engage in regular leadership conversations and workgroups to share lessons learned and promote common approaches. For example, tri-county regional equity meetings provide a venue for sharing best practices and insights and aligning SHS equity strategies across the region. Monthly Built for Zero meetings bring together representatives from the three counties to collaborate and learn from one another's implementation of Built for Zero case conferencing.

Counties also support one another by sharing innovative programs and best practices. For example, Multnomah County shared resources and tools from its racial equity lens with the other counties and Metro to support their racial equity work. Washington County's healthcare case conferencing and housing liaison programs provided a model for similar programs in Clackamas County.

PROGRESS IN ADVANCING RACIAL EQUITY

A commitment to racial equity is infused throughout every aspect of SHS implementation, and counties are required to conduct annual equity analyses to assess progress toward addressing racial disparities. This section provides an overview of the counties' strategies to advance racial equity, showing how various components of SHS implementation – many of which are covered in previous sections of the report by topic – fit together. This is followed by an analysis of the impact of these strategies.

Strategies to advance racial equity

All three counties have centered racial equity in their SHS programs, with a focus on reducing racial disparities and strengthening access to services for communities of color. In year three, counties advanced racial equity through strategies that included:

- **Expanding partnerships with culturally specific organizations:** A core strategy for connecting people of color to SHS-funded services is by expanding the availability of culturally specific services. As documented in previous sections, all three counties expanded their partnerships with culturally specific organizations in year three, contracting with 19 culturally specific organizations to deliver SHS-funded services, with contracts totaling $42.1 million. Counties also provided technical assistance and capacity building support to assist culturally specific partners to expand and stabilize their homeless services programs.
- **Working toward building anti-racist, gender affirming and culturally responsive systems:** The counties provided expanded equity-focused training and technical assistance to contracted providers in year three. For example, Clackamas County worked to develop a comprehensive equity, diversity and inclusion training plan for its providers. Multnomah County launched an electronic learning series and shared a monthly equity based training calendar with tri-county providers. The county also required its contracted providers to submit an annual equity goal or work plan. Washington County provided a catalog of equity-focused trainings for providers, with all partner agencies participating in at least one training.
- **Improving equitable access to services:** The counties continued to strengthen their coordinated entry systems to improve access to services for people of color. Clackamas County implemented a series of recommendations by the Coalition of Communities of Color that included expanding the availability of bilingual/bicultural assessors and strengthening partnerships with culturally specific organizations. Multnomah County's redesign of its coordinated access tool incorporated equity-focused practices such as establishing navigation teams with culturally specific providers and building in flexibility so that participants can be assessed by peer support specialists with lived experience of housing instability. Washington County continued to evaluate its redesigned coordinated entry process to ensure it is resulting in greater access to housing programs for populations of color.
- **Assessing service provider staff diversity:** The counties conduct annual demographic surveys of frontline staff in contracted provider organizations to assess

the diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience. The surveys conducted in year three showed high rates of diversity among provider organizations' staff, as illustrated by the data below. Additional data is available in the counties' annual reports.

Figure 9.1 Workforce diversity of SHS contracted providers

	Clackamas County	Multnomah County	Washington County
Staff with lived experience of homelessness or housing instability	61%	33%	45%
Staff who identify as people of color	40%	45%	47%
Staff who identify as LGBTQIA2S+	10%	18%	26%
Staff who identify as having a disability	16%	14%	17%

- **Strengthening county capacity:** The counties continued to strengthen their internal capacity to advance racial equity through their SHS programs. All three counties now have equity and engagement coordinator positions within their homeless services teams. Clackamas County's staff participated in an equity and inclusion retreat followed by ongoing work with individual coaches after the retreat. Multnomah County's SHS advisory committee formed an equity workgroup that drafted a set of recommendations designed to enhance equity in SHS programming. Washington County is working to formalize a racial equity lens across its homeless services department.
- **Engaging people of color in advisory bodies:** Implementation of each county's SHS work is overseen by advisory bodies with strong representation from communities of color and people with lived experience of homelessness and housing instability. Clackamas County has three advisory committees that provide input on SHS implementation, and work is underway to establish an expanded advisory structure to inform the county's homelessness response system. Multnomah County has five advisory bodies, including an equity advisory committee and a lived experience committee. Washington County launched an updated governance structure in year three, including a lived experience advisory committee and an equitable procurement subcommittee. The diversity of these advisory bodies is illustrated in the table below.

Figure 9.2 Representation of people of color and people with lived experience in advisory bodies

County	Advisory body	People of color	Lived experience
Clackamas	CHA Core Team	45%	73%
Clackamas	CoC Steering Committee	29%	29%
Multnomah	SHS Advisory Committee	75%	75%
Multnomah	JOHS Equity Advisory Committee	92%	92%
Washington	Homeless Solutions Advisory Council	45%	20%

- **Gathering diverse input to inform program design and planning:** In addition to their formal advisory bodies, counties gather input from diverse stakeholders to inform program design and planning decisions. For example, Clackamas County conducted extensive community engagement, with a particular focus on people with lived experience, to develop plans for improving the county's response to family homelessness and addressing housing insecurity and homelessness in the rural areas of the county. Multnomah County developed a community sheltering strategy informed by feedback and collaboration with culturally specific providers and the lived experience advisory committee. The county also conducted an engagement session with 27 culturally specific providers newly qualified for SHS funding which helped shape the development of the county's system development grants pilot. Washington County's Housing and Supportive Services Network, which represents a diverse group of organizations and people with lived experience, is engaged early in project planning to inform the values and criteria used to guide decision making.
- **Analyzing disaggregated data:** Counties continued to work with providers in year three to strengthen the collection of demographic data for SHS participants. Quarterly and annual reports included disaggregated race and ethnicity data by program type and for Populations A and B. In addition, counties conduct annual equity analyses comparing SHS program data with population and system-level data to assess progress in meeting racial equity goals.

Equity analyses

Findings from counties' year three equity analyses indicate that their racial equity strategies are leading to improved access to services for populations of color. This section summarizes each county's equity analysis methodology and reported findings. It is not possible to conduct a comprehensive regional analysis based on these findings because of differences in each county's methodology and the complexities of the baseline data used for comparisons.

Methodologies

The counties' equity analyses compare the demographics of SHS-funded program participants with homeless population data from various sources:

- Clackamas County's equity analysis compared HMIS data for people accessing SHS-funded programs with American Community Survey (ACS) data for the county's population in poverty. The county also analyzed chronically homeless inflow data. The county applied statistical tests to determine if any racial or ethnic groups are disproportionately represented in SHS or chronically homeless data compared to their expected distribution based on the ACS data.
- Multnomah County's equity analysis compared HMIS data on the demographics of people receiving SHS services with the county's total population experiencing homelessness, as captured in its by-name list data. The analysis included comparative data from the first year of SHS reporting to measure improvements over time. The county also compared the demographics of the county's chronically homeless

population from its by-name list with ACS data on the general population of the county and the population at risk of homelessness.

- Washington County's equity analysis compared HMIS data on the demographics of people served by SHS programs with ACS data for the county's population in poverty and the general population of the county. The analysis also included a comparison of the demographics of households seeking homeless services with households who achieve stable housing through the county's programs.

Findings

On the whole, counties report that populations of color are accessing services at higher rates than their representation in each county's homeless population or population in poverty, with a few exceptions for specific populations within particular programs. The findings and conclusions vary by county, population and program. Each county's annual report provides a detailed analysis of these findings. Examples of key overall findings include:

- Clackamas County's analysis shows that more individuals who identify as Black/African American, Native American/Indigenous or Latine are enrolled in SHS programming and represented in SHS housing placements and retentions than expected based on county-wide statistics on populations in poverty. Fewer individuals who identify as Asian American are served by SHS programs than expected based on county-wide poverty statistics. Individuals from historically marginalized communities are overrepresented in chronically homeless inflow data compared to expected distribution rates.
- Multnomah County's analysis shows that people identifying as Black/African American, Native American/Indigenous, Latine, Native Hawaiian and Pacific Islander were served above goal rates for SHS-funded permanent housing programs. Among homelessness prevention programs, performance was mixed. The analysis identified disparities in the provision of some SHS-funded services to specific demographic groups. In particular, Native American/Indigenous populations are being served at lower levels than expected in rapid rehousing and homelessness prevention programs, and Native Hawaiian and Pacific Islander populations are being served at lower levels in permanent supportive housing and prevention programs. The county's analysis of chronic homelessness data found that people of color are over-represented among persons experiencing chronic homelessness.
- Washington County's analysis shows that SHS-funded programs are generally serving higher rates of Black/African American, Native American/Indigenous and Latine households than are represented in the general population, population of poverty, and among households seeking services. The Asian American and Pacific Islander populations experience higher rates of poverty than the rate of households seeking homeless services. Supportive housing programs are the least successful at reaching a diverse population but are still serving populations at similar rates to the percentages of those groups experiencing poverty. Prevention programs have been the most

successful at reaching diverse populations, including Asian Americans and Pacific Islanders.

Disparities and next steps

Counties use the data from their equity analyses to inform targeted strategies to increase service access for specific communities. For example:

- Clackamas County plans to investigate why individuals identifying as Asian American remain underrepresented in housing programs compared to their proportion of the county's population in poverty. In addition, the county will continue to support culturally specific providers serving Asian American populations as they receive technical assistance to enhance service delivery to Asian American and other communities of color.
- Multnomah County's shift in year three toward using non-SHS funds for prevention services led to communities of color receiving SHS-funded prevention services at lower rates than in previous years. The county plans to increase the level of SHS-funded prevention services administered through culturally specific partners in year four to address this disparity.
- Washington County has been working to better understand why Asian American and Pacific Islander households are underrepresented in SHS housing programs compared to their representation in the population experiencing poverty. They have had greater success in serving this population through their eviction prevention program. Additional strategies are being developed to address this disparity, and the county will prioritize renewed outreach to community-based organizations that serve this population to generate feedback and recommendations.

ASSESSMENT OF ANNUAL WORK PLAN PERFORMANCE

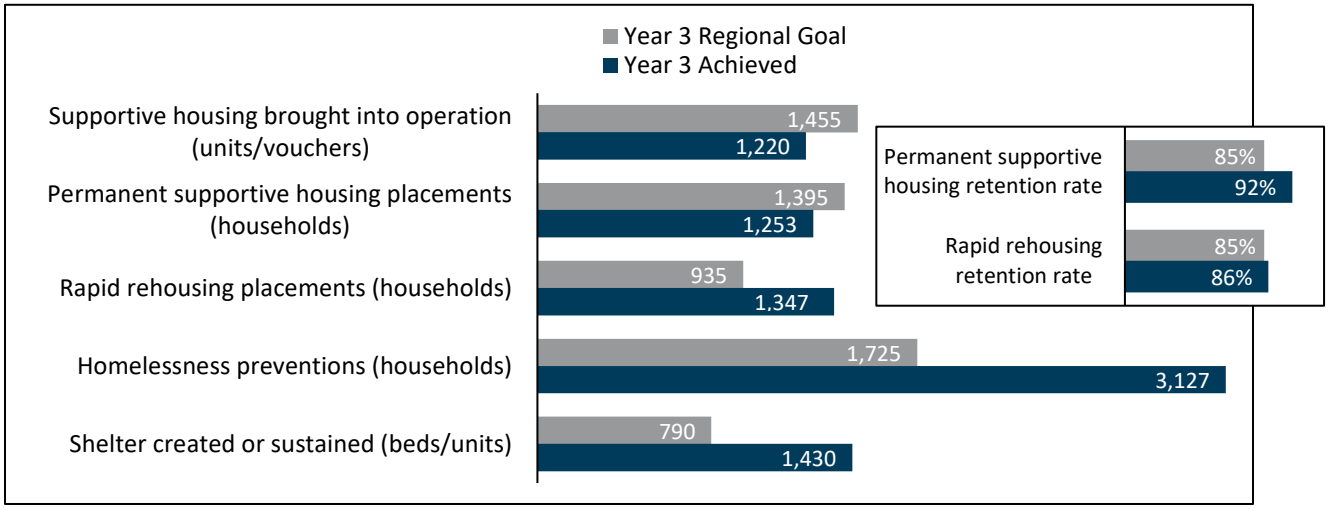
Counties are required to submit annual work plans to Metro and the SHS oversight committee for approval and to report on progress in achieving their work plan goals. The work plans include a consistent set of regional metrics for tracking quantitative housing and program goals. Each county is also required to identify and report on goals related to racial equity, capacity building and other goals based on their local implementation plans.

Regional summary

Housing and program goals

The counties made significant progress on their year three work plan goals, exceeding their combined goals for rapid rehousing placements, homelessness preventions and shelter units created or sustained. The average retention rates for permanent supportive housing and rapid rehousing also exceeded the regional goals. The counties met 84 percent of their combined goal for supportive housing units/vouchers brought into operation and 90 percent of their combined goal for permanent supportive housing placements. The county-specific analyses below provide more details on areas where counties fell short of the goals.

Figure 10.1 Regional progress on year three housing and program goals



Racial equity

The counties achieved most of their racial equity goals and made significant progress on the others. Highlights include expanded investments in culturally specific providers' capacity, providing racial equity training to contracted providers, making coordinated entry systems more accessible and expanding the engagement of diverse stakeholders.

Capacity building

The counties achieved most of their capacity building goals, with a few goals still in progress. Highlights include expansions to county staffing capacity to support health and

housing integration, providing capacity building supports and technical assistance to providers and strengthening data systems.

Other goals based on local implementation plans

The counties completed almost all of their other goals, with achievements related to geographic equity, behavioral health integration, workforce stabilization and launching new programs to fill system gaps.

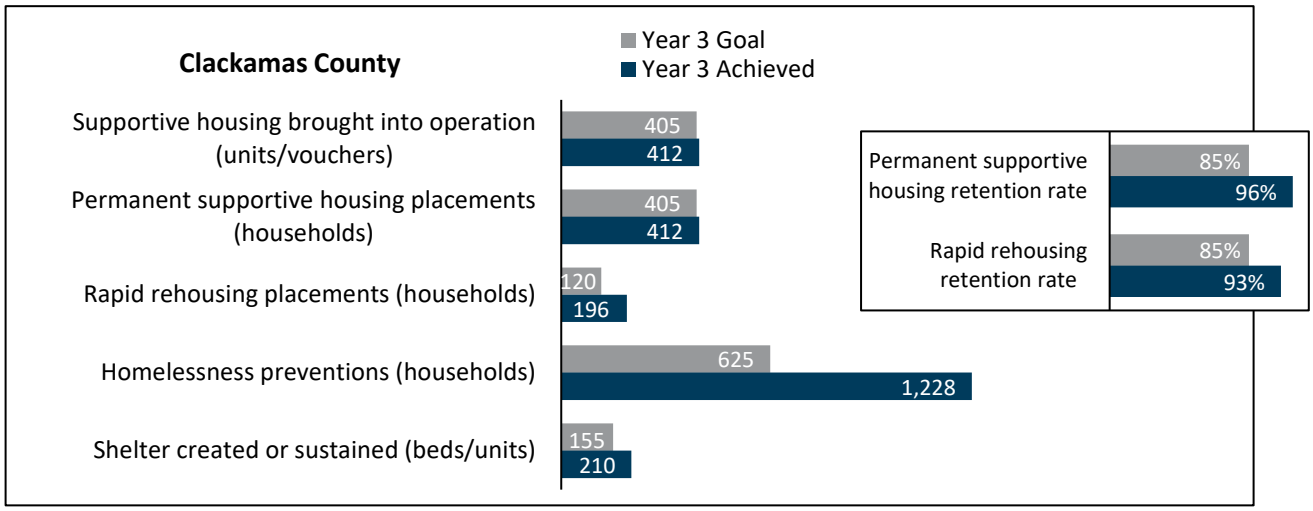
Clackamas County

Clackamas County exceeded all of the regional housing metric goals in its year three work plan. The county also achieved all but one of its work plan goals related to racial equity, capacity building and other local implementation plan priorities.

Housing and program goals

Clackamas County exceeded all of its goals for supportive housing units brought into operation, permanent supportive housing placements, rapid rehousing placements, homelessness preventions, shelter units created or sustained and retention rates.

Figure 10.2 Clackamas County progress on year three housing and program goals



Racial equity goals

Clackamas County achieved its goal of investing in culturally specific provider capacity building by giving culturally specific providers priority access to professional technical assistance. It advanced its goal to improve coordinated entry to ensure more equitable outcomes by making progress on a series of recommendations, such as increasing bilingual staff, expanding coordinated entry capacity, implementing evidence-based changes to assessment and prioritization, and improving the referral process.

Capacity building goals

The county achieved its goal to expand staffing capacity to support integration with the health system by hiring two staff focused on supporting Medicaid waiver coordination and implementation. It achieved its goal to offer direct technical assistance to grassroots providers by contracting with four technical assistance firms. It achieved its goal to invest in new system infrastructure for safety on and off the streets through investments in a resource center, transitional housing and culturally specific shelter. The county's goal to enhance service provider capacity by streamlining access to furniture and household goods for new housing placements is still in progress.

Other goals based on local implementation plan

The county achieved its goal to increase alignment with the behavioral and public health systems through internal coordination and partnerships that are supporting new initiatives such as medical case conferencing and a community paramedic. The county achieved its goal to promote geographic equity by investing non-SHS funding in rural programming and conducting a rural needs assessment and planning process.

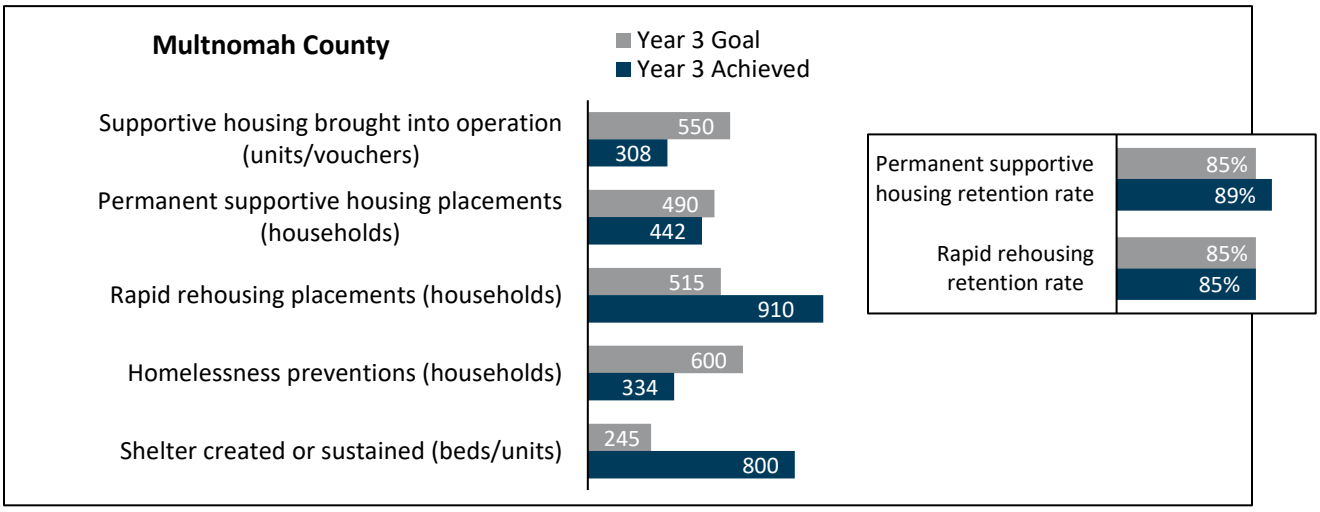
Multnomah County

Multnomah County met or exceeded more than half of the regional housing metric goals in its annual work plan. It achieved about half of the work plan goals related to racial equity, capacity building and other local implementation plan priorities and made significant progress on others.

Housing and program goals

Multnomah County exceeded its goals for rapid rehousing placements, shelter units created or sustained and permanent supportive housing retentions. It met its goal for rapid rehousing retentions and achieved 90 percent of its goal for permanent housing placements. It achieved 56 percent of its goal for supportive housing units brought into operation due to construction delays affecting the opening of several new housing developments which will now come online early in year four. It fell short of its goal for SHS-funded homelessness preventions after making a strategic decision to use federal American Rescue Plan funds for homelessness prevention in year three instead of SHS funds; the total preventions funded by both sources (3,533 households) far exceeded the county's work plan goals.

Figure 10.3 Multnomah County progress on year three housing and program goals



Racial equity goals

Multnomah county made significant progress on its goal to collect employee demographic data from all of its contracted providers, with 91 percent of providers submitting data. It exceeded its goals for SHS advisory committee involvement and expanded training opportunities for providers. The county fell short of its goal for 100 percent of providers to submit an equity goal or work plan; the county anticipates that its investments in technical support and capacity building will result in improved participation in year four.

Capacity building goals

The county achieved its goals to engage and provide technical assistance and/or capacity building funds to new and expanding providers, in part by piloting system development grants to help smaller providers build their administrative infrastructure. The county made significant progress on its goals to complete an analysis of effective shelter models, develop a quality by-name list for chronically homeless adults, expand data collection and update coordinated entry processes, and launch a new coordinated access tool.

Other goals based on local implementation plan

The county completed its goal to conduct follow-up on its compensation study with participating agencies. In response to agency feedback, the county distributed $10 million in flexible grants to 61 organizations to allow providers to address their specific workforce stabilization and organizational health needs. The county also nearly achieved its goal to complete an analysis of unmet needs and investments in east Multnomah County; the final phase of the project will be completed early in year four.

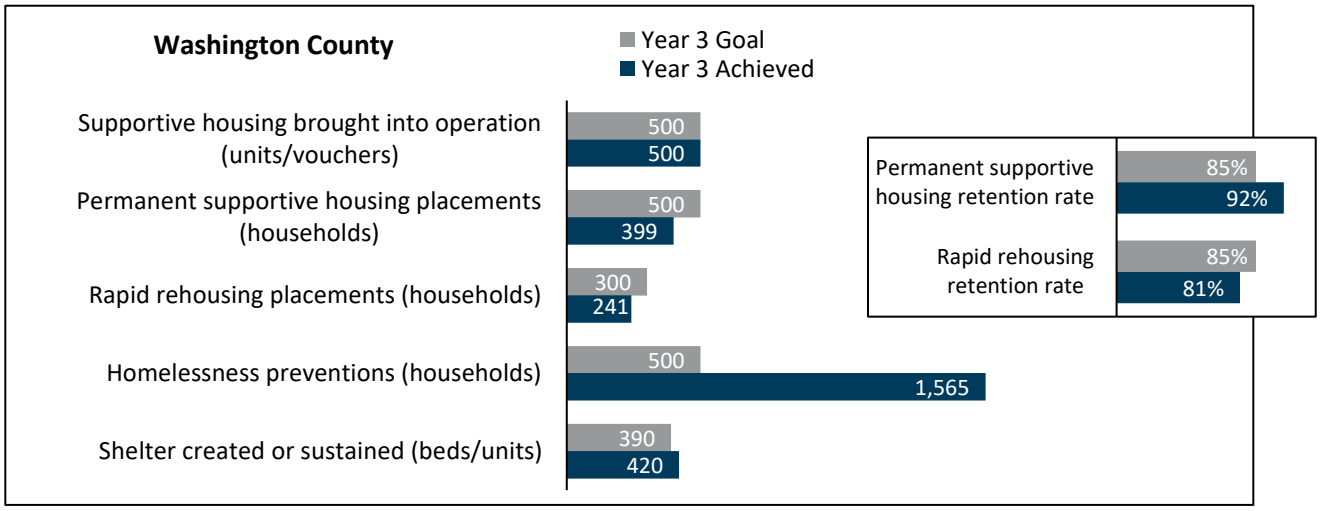
Washington County

Washington County met or exceeded more than half of the regional housing metric goals included in its annual work plan and achieved almost all of its goals related to racial equity, capacity building and other local implementation plan priorities.

Housing and program goals

Washington County met or exceeded its goals for supportive housing brought into operation, homelessness preventions, shelter units created or sustained and permanent supportive housing retention. It achieved 80 percent of its goal for rapid rehousing placements and fell a few percentage points short of its goal for rapid rehousing retentions. The county notes that it is still scaling up its rapid rehousing program and adjusting program standards to support higher need households. The county achieved 80 percent of its permanent supportive housing placement goal after unexpectedly placing an additional 130 households in permanent supportive housing late in year two (exceeding the year two goal by 130 households), which may have affected its year three placement capacity.

Figure 10.4 Washington County progress on year three housing and program goals



Racial equity goals

The county advanced its goal to better understand why Asian American and Pacific Islanders are underserved in housing programs and saw some gains in serving these populations. It also conducted a bi-annual coordinated entry analysis to assess disparities in access to services and housing. The county achieved its goals to increase culturally specific organization capacity by expanding contracting opportunities, technical assistance and capacity building support for its seven culturally specific contracted providers. The county also achieved its training goal, with all partner agencies participating in at least one equity-focused training.

Capacity building goals

The county achieved its goal to expand evaluation and monitoring supports for providers by strengthening annual performance evaluations and piloting a new monitoring framework. It achieved its goal to launch a new governance structure, aligning multiple advisory bodies into a unified “One Governance” approach. The county advanced its goal to launch 45 new housing careers, enrolling 45 people in its housing careers program.

Other goals based on local implementation plan

The county achieved its goal to reduce shelter stays to less than 100 days, with an average shelter stay of 91 days. It advanced its goal to create new housing approaches for households no longer in need of intensive services by launching an "RLRA only" program. It made progress on its goal to launch new programs to fill system gaps for homeless youth and individuals needing medical care by launching a recuperative care program and redesigning a planned youth-focused housing program, although the program's launch was delayed.

REVIEW FOR CONSISTENCY WITH LOCAL IMPLEMENTATION PLANS

The counties' local implementation plans, or LIPs, were approved in 2021, prior to the launch of SHS funding. In alignment with Metro requirements, each county's LIP included commitments to advance racial equity, strengthen regional and cross-sector coordination, build partnerships with community-based organizations, align investments with the SHS measure's guidelines and work toward regional outcome metrics. Previous sections of the report assess counties' progress in each of these areas. This section focuses on the counties' progress in relation to the specific investment priorities and 10-year goals identified in each county's LIP.

The investment priorities and goals listed in the LIPs reflect the counties' overarching values and intentions for SHS funding and serve as guiding documents for the counties' annual work plans. While the LIPs provide a high-level framework for assessing counties' SHS implementation, they do not provide consistent or comprehensive metrics for evaluating progress. The specificity, level of detail, timeframes and categories vary across each of the LIPs, as do the counties' approaches for reporting on LIP progress. Potential updates to the LIPs should be considered in tandem with efforts to strengthen and refine the SHS regional outcome metrics to provide a better framework for regional evaluation.

Clackamas County

System-wide priorities

LIP priority	Year three progress
Build community-based organization capacity	• Contracted with 26 community-based organizations (including six new partners) to deliver SHS services, with contracts totaling $33.6m. • Allocated $1.0m per year for technical assistance to support service providers' capacity building. • Added $1.9m to five service providers' budgets to support internal capacity building. • Provided trainings and presentations for contracted providers to share best practices and promote consistent approaches.
Expand culturally specific services	• Expanded the county's contracts with culturally specific providers from one contract before SHS launched to six contracts in year three, with contract allocations of $5.7m. • Doubled the county's contract allocations to culturally specific providers between years two and three. • Provided over $2m in capacity building grants to support culturally specific providers' growth and development since SHS began.
Evaluate system and program strategies to inform priorities and ensure quality improvement	• Conducted an annual equity analysis of SHS-funded programs since SHS launched to evaluate systemic strengths and gaps and identify areas for improvement. • Conducted a staff demographics and pay equity survey for SHS-contracted providers in years two and three to inform strategies to strengthen workforce and wage equity.

	• Implemented contract monitoring tools to facilitate data-driven, outcomes-based discussions with providers and support continuous improvement.
Strengthen data collection and reporting	• Expanded the county's data capacity, adding staff to support data collection, system evaluation and improvement. • Organized ongoing technical assistance and training for providers to support their data quality and capacity. • Used the Built for Zero methodology to conduct an inflow and outflow analysis. • Coordinated with the other counties to regionalize Homeless Management Information System policies and procedures, share best practices and align metrics.
Enhance system navigation, outreach and coordinated entry to ensure equitable access	• Improved the county's coordinated entry system in years two and three to eliminate backlogs, expand hours, increase capacity and improve equitable access. • Used SHS funding to support the county's first ever coordinated outreach program, with outreach carried out by six providers, including two grassroots and two culturally specific providers. • Funded development of a service-enriched resource center that will provide a welcoming space to support system navigation and connections to services.
Expand county implementation capacity	• Tripled the county's SHS spending in year three compared with the previous fiscal year. • Continued to add additional county staff capacity, including new analysts, health and housing integration staff, and a dedicated equity and engagement coordinator. • Improved the county's contract administration processes, resulting in 82% of invoices processed within 30 days of receipt.

Housing-related priorities

LIP priority	Year three progress
Increase emergency shelter capacity with wrap around services to transition people to permanent housing	• Created or sustained 210 units of emergency and transitional shelter with SHS funding, including hotels, villages and pods. • Served 460 households in SHS-funded shelters in year three. • Provided connections to services for households served in SHS-funded shelters to help them transition to housing.
Increase housing placement services including those designed to be culturally responsive	• Placed 930 households in permanent supportive housing since SHS funding began, including 412 households in year three. • Placed 215 households in permanent housing through the county's rapid rehousing program since SHS funding began, including 196 households in year three. • People of color represented 49% of people placed in permanent supportive housing and 49% of people placed in rapid rehousing in year three.
Expand existing high performing programs including eviction prevention as funding allows	• Stabilized 1,514 households with SHS-funded eviction prevention services since SHS funding began, including 1,228 households in year three. • Incorporated SHS funding into eight Metro bond-funded housing developments, creating 231 PSH units with on-site services delivered by SHS-funded providers.

Convert time-limited vouchers to long-term and short-term rental assistance	• Housed 783 households with regional long-term rent assistance since SHS funding began, including 358 households newly leased up in year three.

Supportive services-related priorities

LIP priority	Year three progress
Increase outreach and engagement using trauma informed care and other best practices that are culturally and linguistically responsive	• Made contact with 502 households in year three through a combination of site-based, in-reach, pop-up events and mobile outreach methods. • Developed a new resource navigation program to provide trauma-informed diversion and rapid resolution for people in crisis contacting the coordinated access hotline. • Invested SHS resources to develop a resource center that will provide an additional entry point for service navigation and connections to resources.
Expand wraparound services to support housing stabilization, including behavioral health services, mental health services, addiction recovery and case management	• 96% of households in permanent supportive housing and 93% of households in rapid rehousing retained their housing over 12 months. • Significantly expanded the county's housing stabilization case management services through contracts with 12 providers with capacity to serve nearly 1,000 households. • Used SHS funding to support a behavioral health housing retention team to provide clinical supports to PSH residents.
Expand behavioral health services integrated with homelessness and housing services, particularly community-based health connectors and peer supports	• Strengthened internal coordination with the county's Public Health and Behavioral Health divisions, resulting in new programs such as medical respite and a community paramedic pilot. • Used SHS funding to support two behavioral health case managers who assist people who require higher levels of behavioral health support to find and remain in permanent housing. • Invested SHS funds to develop a recovery-oriented transitional housing program that will open in 2025.

10-year goals

Clackamas County's LIP identified specific numerical goals for the first year of implementation. The county has subsequently identified the following 10-year goals:

Goal	Progress to date
Place 1,065 households in permanent supportive housing	• In the first three years of SHS implementation, 930 households were placed in permanent supportive housing, representing 87% of the county's 10-year goal.
Stabilize 2,130 households in permanent housing	• In the first three years of SHS implementation, the county stabilized 1,729 households in permanent housing through eviction prevention and rapid rehousing, representing 81% of the county's 10-year goal.

Multnomah County

System-wide priorities

LIP priority	Year three progress
Build community-based organization capacity	• Contracted with 70 community-based organizations (including 15 providers new to SHS) to deliver SHS-funded services, with contracts totaling $138.5m. This includes contracts with 14 culturally specific providers (six of which were new to SHS) totaling $17.7m. • Increased contract allocations to culturally specific providers by 91% between years two and three. • Partnered with United Way to distribute $10m in organizational health grants to 61 organizations. • Launched provider conferences to facilitate opportunities for networking, information sharing, collaborative problem solving and shared learning. • Piloted system development grants to support capacity building for 11 new and emerging culturally specific providers that qualified for SHS contracts.
Ongoing evaluation to ensure quality improvement	• Conducted an annual equity analysis of SHS-funded programs since SHS launched to evaluate progress in reducing disparities and identify areas for improvement. • Conducted a staff demographics and pay equity survey for SHS-contracted providers in years two and three to inform strategies to strengthen workforce and wage equity. • Implemented contract monitoring measures to support quality improvement, such as internal tracking tools, annual performance reviews and on-site monitoring. • Implemented SHS-funded evaluations that will inform future programming, including a geographic equity study, an analysis of factors that led people to successfully exit homelessness and an evaluation of shelter best practices.
Strengthen data systems, collection and reporting	• Became the lead agency for the regional Homeless Management Information System and worked with the other counties to regionalize HMIS policies and procedures, share best practices and align metrics. • Developed a shelter availability tool that shares timely information on how many shelter beds are available and where they can be accessed. • Worked to complete a by-name list of people in Population A and developed a methodology to create a by-name list for everyone experiencing homelessness in the county. • Supported providers' data capacity through HMIS training, data quality monitoring and follow-up.
Improve navigation, outreach and coordinated entry to ensure equitable access	• Completed a multi-year redesign of the county's coordinated access tool to be more trauma-informed, aligned with local priorities and promote equitable access to services. • Used SHS funding to expand day center and drop-in services as well as fund mobile day services and on-site outreach.

	• Used SHS funding to support 22 outreach teams, with the majority of the teams engaged in outreach to support service navigation and housing connections.
Expand county program implementation capacity	• Expanded staff capacity in key areas such as finance, programs, data and evaluation, growing the staff from 30 employees when the SHS measure passed to about 100 by the end of year three. • Spent 100% of the county's share of SHS tax revenue collected by Metro in year three and met all of the spending goals outlined in the county's corrective action plan. • Improved the county's contract management and invoicing processes, resulting in more timely payments to providers.

Housing-related priorities

LIP priority	Year three progress
Supportive housing in bond-funded projects and for specific communities	• Created 1,515 SHS-funded supportive housing opportunities in the first three years of implementation, including 308 in year three. • Used SHS funding to support the addition of 335 project-based permanent supportive housing units, including 47 units in Metro bond-funded projects. • Implemented SHS-funded supportive housing programs focused on specific communities such as people with disabilities, people who are justice-involved and people with behavioral health challenges.
Regional long-term rent assistance	• Housed 974 households with regional long-term rent assistance since SHS funding began, including 428 households newly leased up in year three.
Flexible short- and medium-term rental assistance	• Placed 1,704 households in permanent housing through the county's rapid rehousing program since SHS funding began, including 910 households in year three.
Eviction prevention	• Used SHS funding to support the staffing capacity needed to disburse eviction prevention assistance funded by the American Rescue Plan and to directly fund eviction prevention services. • Stabilized 11,557 households with SHS-funded eviction prevention services in the first three years of implementation, including 334 households in year three.
Street and shelter services	• Created or sustained 800 emergency shelter units in year three with SHS funding, including alternative, congregate and motel shelters. • Served 871 households in SHS-funded shelters in year three. • Used SHS funding to support 22 street outreach teams from 17 organizations with the capacity to serve 1,375 households. • Used SHS funding to support new mobile day services and on-site outreach and to sustain and expand existing day center and drop-in services, supporting the capacity for more than 90,000 annual day center visits.

Supportive services-related priorities

LIP priority	Year three progress
Behavioral health services	• Committed SHS revenue to new projects that will support people experiencing behavioral health challenges, including 89 new beds

	of recovery-oriented housing, access to crisis stabilization services, and a new stabilization and treatment program. • Used SHS funds to support a dedicated housing specialist to help participants in the county's behavioral health programs secure housing that meets their needs. • Paired 175 regional long-term rent assistance vouchers with intensive case management for people experiencing homelessness with behavioral health challenges.
Education, training, employment and benefits	• Invested in five SHS-funded employment and training programs with the capacity to serve 562 households.
Housing placement and retention case management	• 89% of households in permanent supportive housing and 85% of households in rapid rehousing retained their housing over 12 months. • Used SHS funds to support 30 contracts for housing placement and/or retention services with the capacity to serve 976 households.
Legal assistance	• Used SHS funds to provide legal support to 605 clients through the Housing Barrier Mitigation Program.
Childcare and other supports for families with children	• Allocated 150 regional long-term rent assistance vouchers to participants in the Multnomah Stability Initiative, which connects families with children to flexible resources and services to support their needs.

10-year goals

Goal	Progress to date
Create 2,235 supportive housing units	• In the first three years of SHS implementation, the county created 1,515 SHS-funded supportive housing units, representing 68% of the county's 10-year goal.
Increase the number of eligible households who exit homelessness for permanent housing by at least 2,500 households per year once SHS is fully implemented	• In year three, 1,549 households exited homelessness for permanent housing with support from SHS-funded programs.
Increase the number of people experiencing behavioral health challenges who move into appropriately supported housing	• The county has built partnerships and invested SHS resources in multiple programs to connect people with behavioral health challenges with appropriately supported housing (see "behavioral health services" section above for examples).
Reduce the number of people who become homeless by increasing preventions by at least 1,000 households per year once SHS is fully implemented	• SHS funding has supported homelessness prevention services for an average of 3,852 households per year since SHS implementation began.
Reduce the number of people who return to the homeless services system within two years after entering permanent housing	• The average rate of returns to homelessness within two years for households served by the county's SHS-funded programs was 19% in year three, compared with a system-wide county average of 26%.

Eliminate disparities in access and outcomes for Communities of Color participating in homeless and housing services	• The county's SHS-funded programs have housed people of color at higher rates than their representation in the overall homeless population, on the whole. • People of color represented 66% of the county's permanent supportive housing placements, 64% of the county's rapid rehousing placements and 44% of the county's homelessness preventions in year three.

Washington County

System-wide priorities

LIP priority	Year three progress
Expand culturally specific services	• Expanded the county's contracts with culturally specific providers from one contract before SHS launched to seven contracts in year three, with contract allocations of $18.8m. • Increased the county's contract allocations to culturally specific organizations by 77% between years two and three. • Awarded technical assistance and/or capacity building project funding to all seven culturally specific partner agencies (see details below).
Support community-based organization capacity	• Contracted with 24 community-based organizations to deliver SHS services, with contracts totaling $62.2m. • Allocated $235,000 in technical assistance funding to eight agencies. • Provided a total of $1.7m in capacity building project funding to 14 agencies. • Funded 19 quality assurance positions in contracted partner organizations to support financial operations, data quality and organizational capacity. • Provided a catalog of equity-focused trainings for providers, with all partner agencies participating in at least one training. • Provided job training and internship opportunities for 45 community members with lived experience interested in housing-related careers. • Created multi-service contracts to reduce the administrative burden on providers and reduced invoice processing time to 18 days. • Conducted annual provider performance evaluations in years two and three to support quality improvement and capacity building.

Housing-related priorities

LIP priority	Year three progress
Winter and year-round shelter operations	• Created or sustained 420 units of year-round emergency shelter with SHS funding, including alternative shelters and pods. • Served 1,367 households in SHS-funded shelters in year three. • Launched a shelter liaison program that embeds 13 liaisons throughout the county's shelters to support participants with connections to housing programs.

Housing barrier costs and short-term rent assistance	• Placed 471 households in permanent housing through the county's rapid rehousing program since SHS funding began, including 241 households in year three. • Stabilized 1,999 households with SHS-funded eviction prevention services since SHS funding began, including 1,565 households in year three. • Launched a new move-in assistance program to quickly support Population B households needing short-term interventions to secure housing.
Regional long-term rent assistance	• Housed 1,375 households with regional long-term rent assistance since SHS implementation began, including 394 households newly leased up in year three. • Created 70 units of dedicated permanent supportive housing in seven Metro bond-funded projects by pairing regional long-term rent assistance vouchers with on-site services.
System capacity	• Increased the county's supportive housing capacity by 1,610 SHS-funded units since SHS implementation began. • Increased the county's SHS-funded shelter system capacity by 420 year-round units since SHS implementation began.

Supportive services-related priorities

LIP priority	Year three progress
Outreach and navigation services	• Contracted with 10 organizations to provide geographically designated and population-specific outreach. • Implemented a Locally Coordinated Command Center strategy that targets large encampments with focused engagement and cross-agency coordination to connect people with housing. • Served 1,061 households through the county's outreach program. • Awarded SHS funding for the development of two access centers that will provide meals, storage, showers, and connections to housing and services.
Behavioral health services	• Used SHS funding to connect behavioral health services participants with housing resources through Housing Liaisons embedded in behavioral health programs. • Allocated SHS resources toward capital funding for transitional housing, prioritizing projects that will provide behavioral health services on site to support people in their transitions to recovery.
Supportive services	• Funded over 100 case managers to guide people experiencing homelessness toward stable housing. • 92% of households in permanent supportive housing and 81% of households in rapid rehousing retained their housing over 12 months. • Partnered with hospitals and health systems to connect participants experiencing homelessness to healthcare services through healthcare case conferencing. • Launched a medical respite pilot to help people discharged from hospitals needing additional medical care to stabilize in shelter while working toward stable housing.

10-year goals

Goal	Progress to date
Create 1,665 supportive housing placements	• In the first three years of SHS implementation, the county created 1,293 SHS-funded supportive housing placements, representing 77% of the county's 10-year goal.
Stabilize 3,330 households in permanent housing[2]	• In the first three years of SHS implementation, the county stabilized 2,313 households through eviction prevention and rapid rehousing, representing 69% of the county's 10-year goal.
Achieve sustained operations for 250 year-round shelter beds	• In the first three years of SHS implementation, 420 year-round shelter units have been created or sustained, exceeding the county's 10-year goal.
Build and support a network for culturally specific services and culturally responsive programs	• In year three, the county contracted with 24 community-based organizations to deliver culturally responsive services, including seven culturally specific organizations. • The county supports its network of contracted organizations with capacity building funding, training, technical assistance and performance monitoring (see "system-wide priorities" section above for details).
Demonstrate housing placement and stability outcomes that advance racial equity and functionally end chronic homelessness	• The county's SHS-funded programs are generally serving higher rates of Black/African American, Native American/Indigenous and Latine households than are represented in the general population, population in poverty, and among households seeking services. • The county has met the housing needs of 58% of Population A households needing supportive housing.

[2] This goal is not in the county's LIP but was added subsequently.

FINANCIAL REVIEW

Total SHS spending by the counties nearly doubled between years two and three, even though tax collections in year three were slightly lower than the previous year. After struggling with underspending during the first two years of SHS implementation, county spending was equivalent to 95 percent of the tax revenue collected in fiscal year 2023-24 and represented 45 percent of the total available resources including carryover from previous years. All of the remaining 55 percent in carryover funds have now been fully committed. Looking forward, counties anticipate fully spending SHS resources in future years to meet current commitments and ongoing program costs.

This section provides an overview of tax collections, disbursements, county revenue and spending in year three. A more comprehensive financial report is available in Exhibit F.

Tax collections

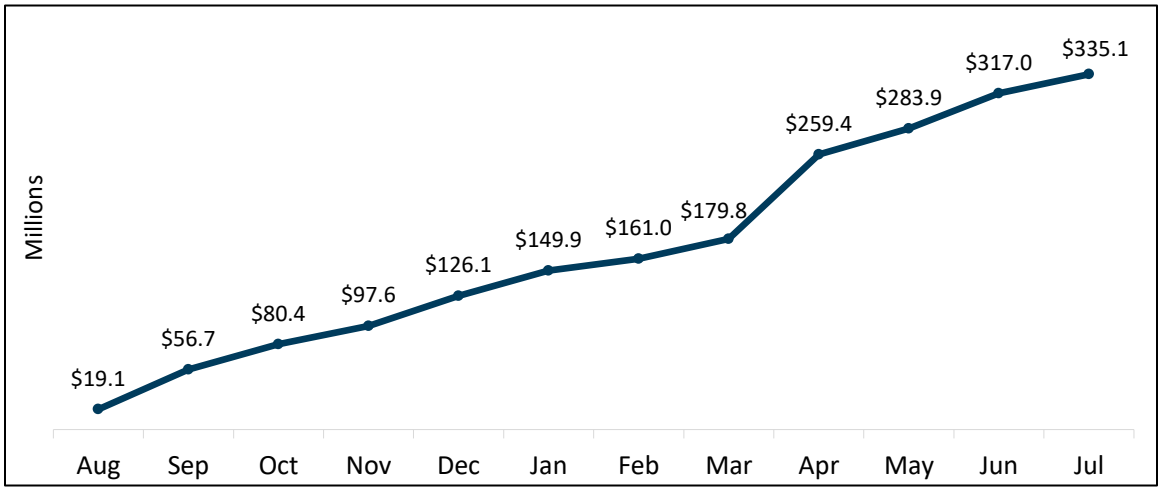
Metro tax revenue for year three totaled $335.1 million, which was $122.6 million higher than the original budget but $21.6 million lower than the fall 2023 forecast.

Figure 12.1 Fiscal year 2023-24 tax revenue projections and collections

Original budget	$234,100,000
Fall 2023 forecast	$356,700,000
Actual collections	$335,136,020

The higher revenue estimates in the fall forecast were prompted by a strong start to fiscal year 2023-24 collections. The local economy did not perform as strongly as expected, however, resulting in final collections that were 6.1 percent lower than the forecasted amount and around 3.5 percent less than the tax revenue collected the prior year.

Figure 12.2 Fiscal year 2023-24 cumulative tax collection by month (in millions)



The August 2023-July 2024 period shown in the chart reflects the period of fiscal year 2023-24 tax revenue, in accordance with generally accepted accounting principles.

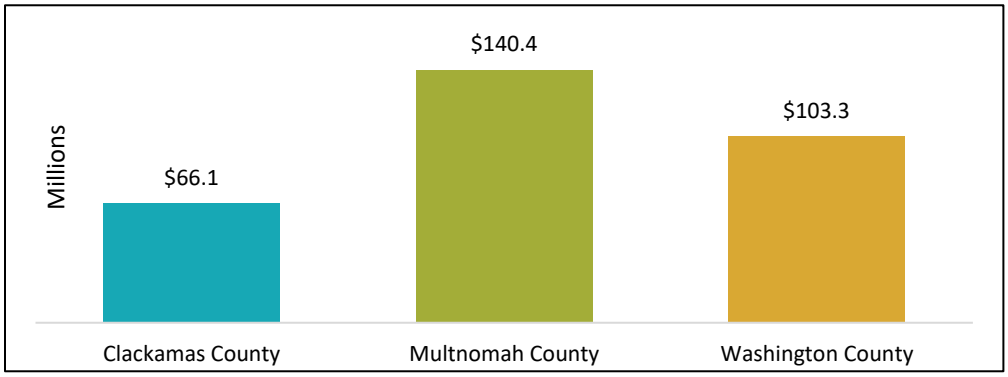
Additional data on SHS tax collections is available in Metro's interactive online dashboard.

The trend of weaker collections has continued through the first quarter of fiscal year 2024-25. Recent tax return data suggests that the spike in revenue in the first two years of collections was an anomaly. The fall 2024 five-year revenue forecast indicates that the next two years, at least, will likely result in slow to no growth in revenue. This means that forecasted collections in the next few years are about $50 million lower than previously anticipated. The structure of the SHS tax makes it inherently volatile and subject to fluctuations; due to the unstable nature of the taxes, sudden and significant changes in collections (both positive and negative) are always possible.

Tax disbursements

The counties' share of year three tax revenue totaled $309.8 million. In accordance with the SHS fund's distribution formula, 21.3 percent was disbursed to Clackamas County, 45.3 percent to Multnomah County and 33.3 percent to Washington County.

Figure 12.3 Year three tax revenue disbursed to counties (in millions)



County revenue and carryover funds

Counties' total resources for year three included the $309.8 million in tax revenue plus $334.6 million in prior year carryover and $14.5 in other revenue (primarily interest earnings and FEMA grant reimbursement).

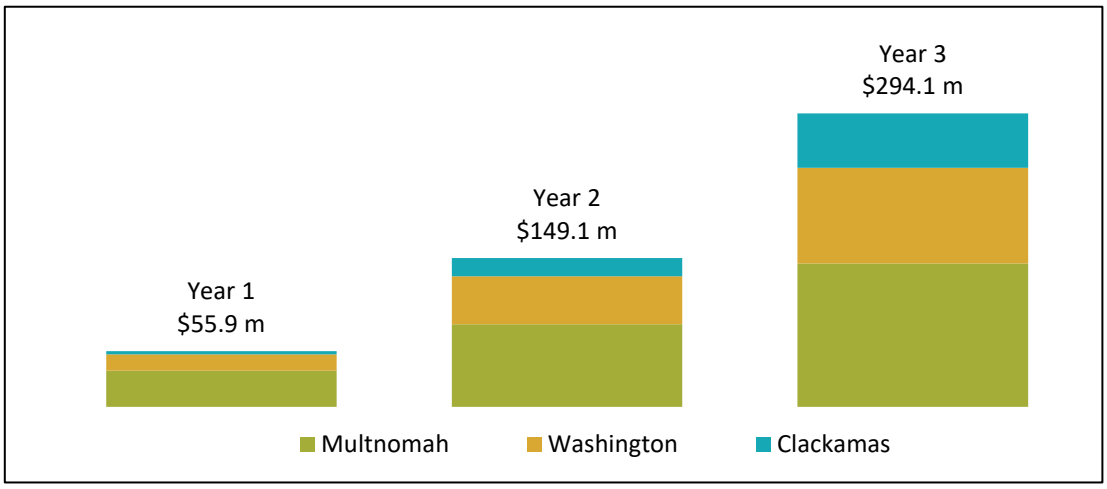
Figure 12.4 Year three tax revenue and prior year carryover (in millions)

	Clackamas County	Multnomah County	Washington County	Regional total
Prior year carryover	$92.7	$126.4	$115.5	$334.6
SHS tax revenue	$66.1	$140.4	$103.3	$309.8
Other revenue	$3.2	$4.7	$6.6	$14.5
Total resources	$162.0	$271.5	$225.4	$658.9

County SHS spending

SHS spending by the counties in year three totaled $249.1 million, almost double year two spending.

Figure 12.5 Regional SHS spending



The percentage increase in spending from year two to year three was greatest in Clackamas County, but the total amount of increased spending was greatest in Multnomah County.

Figure 12.6 County spending in years two and three (in millions)

	Clackamas County	Multnomah County	Washington County	Regional total
Year two	$18.4	$82.6	$48.1	$149.1
Year three	$54.4	$143.5	$96.2	$294.1
% increase	196%	74%	100%	97%

Counties' spending in year three represented 95 percent of fiscal year 2023-24 tax revenue and 45 percent of total SHS resources, which includes tax revenue and prior year carryover.

Figure 12.7 County spending in year three compared with revenue and total resources (in millions)

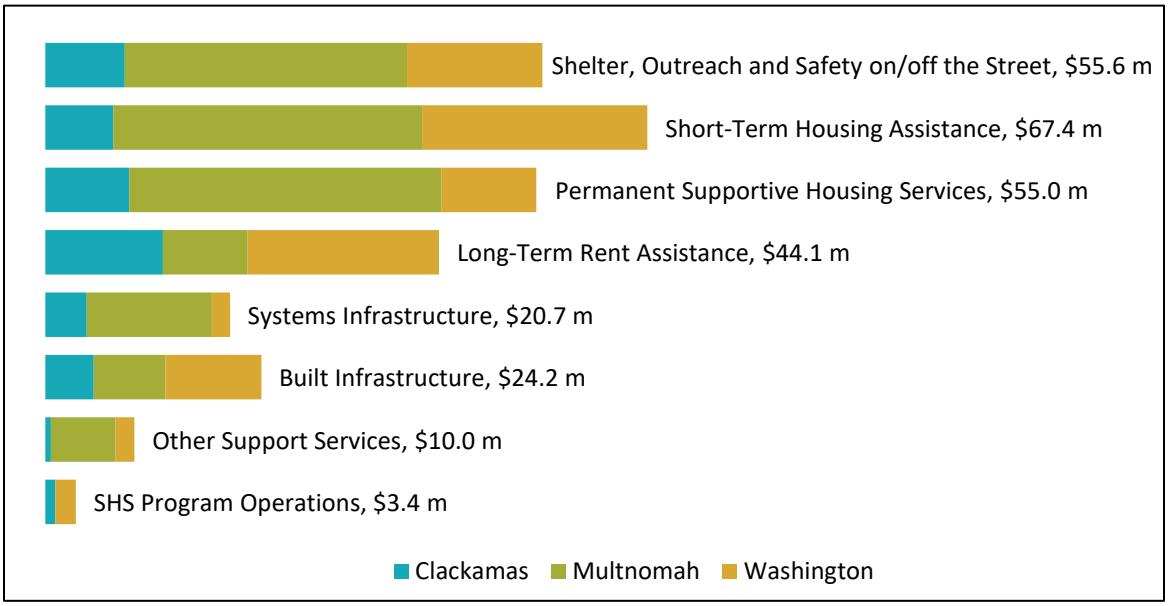
	Clackamas County	Multnomah County	Washington County	Regional total
FY 23-24 total resources	$162.0	$271.5	$225.4	$658.9
Program costs	$54.4	$143.5	$96.2	$294.1
Ending balance (incl. reserves)	$107.6	$128.0	$129.2	$364.8
% of FY 23-24 tax revenue spent	82%	102%	93%	95%
% of total SHS resources spent	34%	53%	43%	45%

Program expenditures

In year three, the largest program spending category was short-term housing assistance, which includes rapid rehousing and homelessness prevention services. This was followed

by shelter, outreach and safety on/off the street, closely followed by permanent supportive housing.

Figure 12.8 Regional year three program expenditures



Contingencies and reserves

In addition to program costs, counties allocate resources to contingency and reserve accounts. A minimum of 10 percent of budgeted program funds in a given fiscal year is required to be dedicated to a stabilization reserve in the event that revenue falls below budgeted estimates. Counties are required to allocate a minimum of 5 percent of annual program funds to the regional investment fund, most of which has been allocated into reserves pending development of the TCPB's regional implementation strategies. Counties may also allocate up to 5 percent of budgeted program funds to a contingency account to use in emergency situations or for unplanned program expenditures necessary for SHS service delivery. Counties may also allocate resources to other programmatic reserves.

In year three, Multnomah County allocated 7 percent of budgeted revenue into reserve and contingency accounts, Clackamas County allocated 11 percent, and Washington County allocated 57 percent based on anticipated actual expenditures in year three. The bulk of Washington County's allocation was to programmatic reserves for built infrastructure projects that were initiated in year three but will be completed in subsequent years.

County administrative costs

Metro recommends that each county's program administrative costs do not exceed 5 percent of SHS program revenue. This does not include the administrative costs of service providers or regional long-term rent assistance, which are tracked separately. In fiscal

year 2023-24, the counties' administrative costs represented 2.3 percent of SHS program revenue.

Figure 12.9 County administrative costs as a percentage of SHS program revenue

	Clackamas County	Multnomah County	Washington County	Regional total
% of SHS program revenue spent on admin costs	4.2%	1.6%	1.9%	2.3%

In addition to tracking the administrative cost caps and recommendations based on revenue, Metro also tracks administrative costs as a percentage of expenses. In fiscal year 2023-24, total regional administrative costs (including Metro's administrative costs) represented 4.7 percent of regional SHS program expenditures. The counties' administrative costs represented 2.4 percent of the counties' total SHS expenditures.

Figure 12.10 County administrative costs as a percentage of SHS expenditures

	Clackamas County	Multnomah County	Washington County	Regional total
% of SHS expenditures spent on admin costs	5.1%	1.6%	2.1%	2.4%

County administrative costs do not include the administrative costs of contracted service providers or regional long-term rent assistance. RLRA is administered by the housing authority of each county, separate from SHS. Metro recommends that administrative costs for RLRA not exceed 10 percent of annual RLRA expenses, and all counties were below this recommended limit.

Figure 12.11 Administrative costs for regional long-term rent assistance

	Clackamas County	Multnomah County	Washington County	Regional total
% of RLRA program costs that were for admin	4.5%	5.9%	1.9%	3.6%

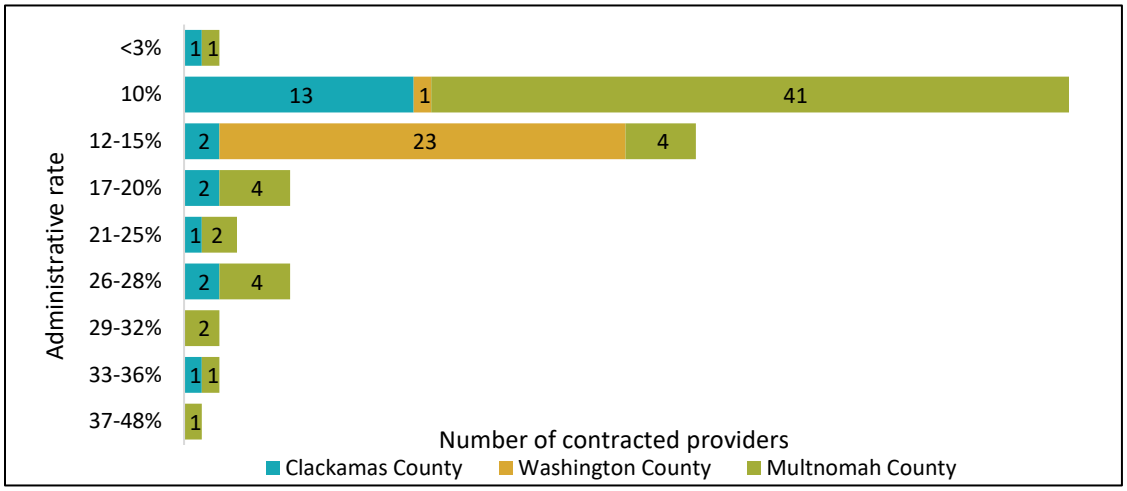
Provider administrative costs

The SHS work plan did not establish guidelines for provider administrative costs but charged the SHS oversight committee with monitoring the administrative rates for contracted providers and recommending the adoption of guidelines if needed.

Most of the counties' contracts with providers for SHS-funded services in year three used the county de minimis administrative rate. For fiscal year 2023-24, this rate was 10 percent in Clackamas and Multnomah counties and 12 percent in Washington County. (These rates will increase to 15 percent in upcoming fiscal years to align with updated federal guidance.) All other providers used negotiated indirect cost agreement rates or cost allocation plans, which ranged from less than 3 percent to 48 percent.

Across all three counties, the vast majority of providers (79 percent) had administrative rates between 10 and 15 percent.

Figure 12.12 Administrative rates for contracted providers



Counties' year three budgets and expenditures

Counties budget SHS resources based on a strategic assessment of program capacity and ongoing year-over-year costs for each new program or housing placement. As a result, annual budgets and expenditures do not necessarily utilize all available SHS resources in a given year. This is necessary to ensure there is sufficient funding to sustain current program levels and support long-term housing stability for households placed in permanent supportive housing.

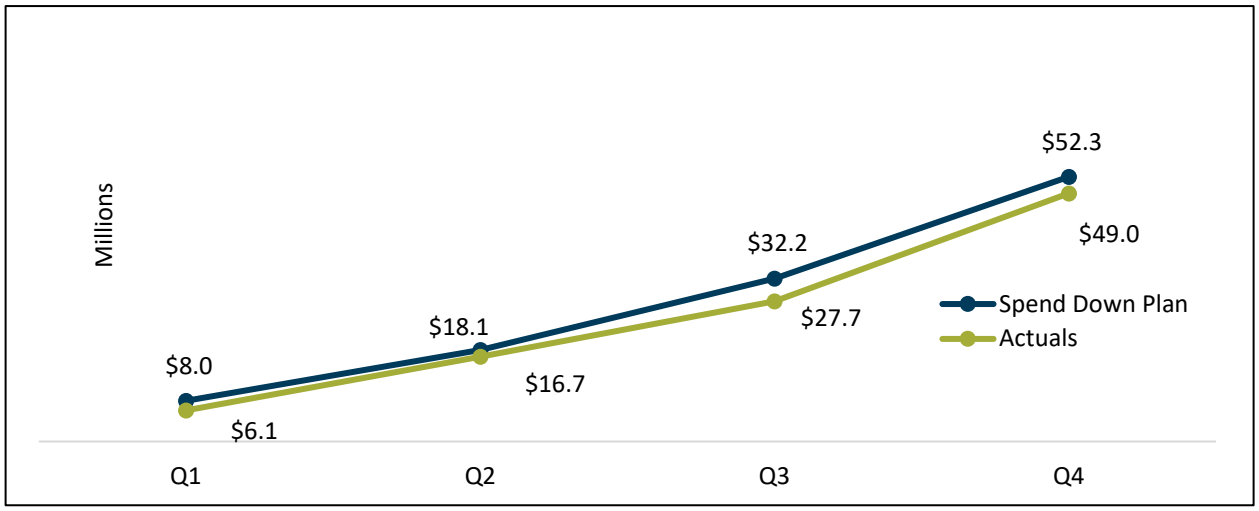
Clackamas County

Clackamas County budgeted a total of $92.7 million in fiscal year 2023-24 based on anticipated SHS revenues and prior year carryover funds. The county spent $54.4 million, which was 59 percent of its program budget. The county's goal was to spend 65 percent of its program budget, but actual expenditures fell below the goal due to two built infrastructure projects that took additional time to get underway. The county had an ending balance of $107.6 million in resources at the end of year three.

The county began utilizing its carryover funds in year three to invest in five priority areas: regional strategies, expanding system capacity, upstream investments, short-term rent assistance and capital needs. All of the county's SHS funding has now been committed to new or upcoming programming. The county expects to see a decline in underspending and carryover as ongoing services and one-time investments fully ramp up over the next few years.

Figure 12.13 shows the county's planned program expenditures versus actuals for year three. The spend-down plan is based on the percentage of funding the county planned to spend each quarter on program costs. This does not include spending on built infrastructure, contingency or reserves. Clackamas County's program expenditures were slightly below its spend-down plan, with total actual expenditures at 94 percent of the expected amount.

Figure 12.13 Clackamas County year three spend-down plan versus actuals



Figures are cumulative and exclude built infrastructure.

Multnomah County

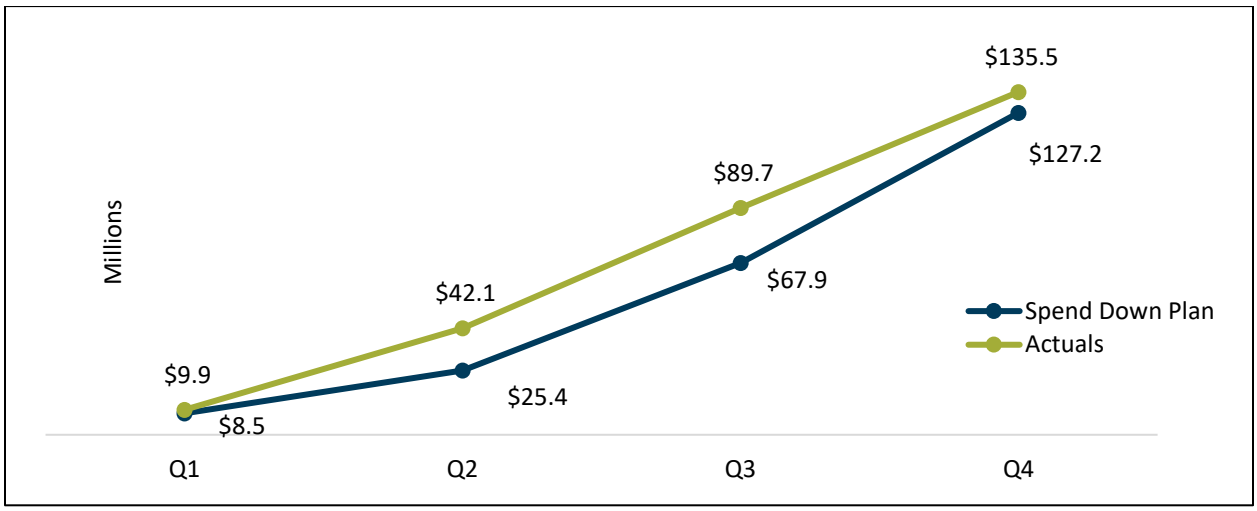
Multnomah County budgeted a total of $190.1 million in fiscal year 2023-24 based on forecasted SHS revenue and prior year carryover funds. The county spent $143.5 million, which represented 75 percent of its approved budget and more than 100 percent of fiscal year 2023-24 tax collections. The county had an ending balance of $128.0 in resources by the end of year three.

Carryover funding from previous fiscal years was used for strategic one-time only investments in year three, with the majority of carryover funding budgeted in shelter, street outreach, safety on and off the streets, and short-term housing assistance. Any carryover that was unspent in year three is included in the county's fiscal year 2024-25 budget.

The scale of Multnomah County's underspending in year two led Metro to initiate a corrective action plan that laid out a strategy and timeline for the county to distribute the unspent funds to address priority needs. The county met all the spending goals outlined in the corrective action plan by the end of year three.

Figure 12.14 shows the county's planned program expenditures versus actuals for year three. The spend-down plan is based on the percentage of funding the county planned to spend each quarter on program costs. This does not include spending on built infrastructure, contingency or reserves. Multnomah County's program expenditures exceeded its spend-down plan, with total actual expenditures at 106 percent of the expected amount.

Figure 12.14 Multnomah County year three spend-down plan versus actuals



Figures are cumulative and exclude built infrastructure.

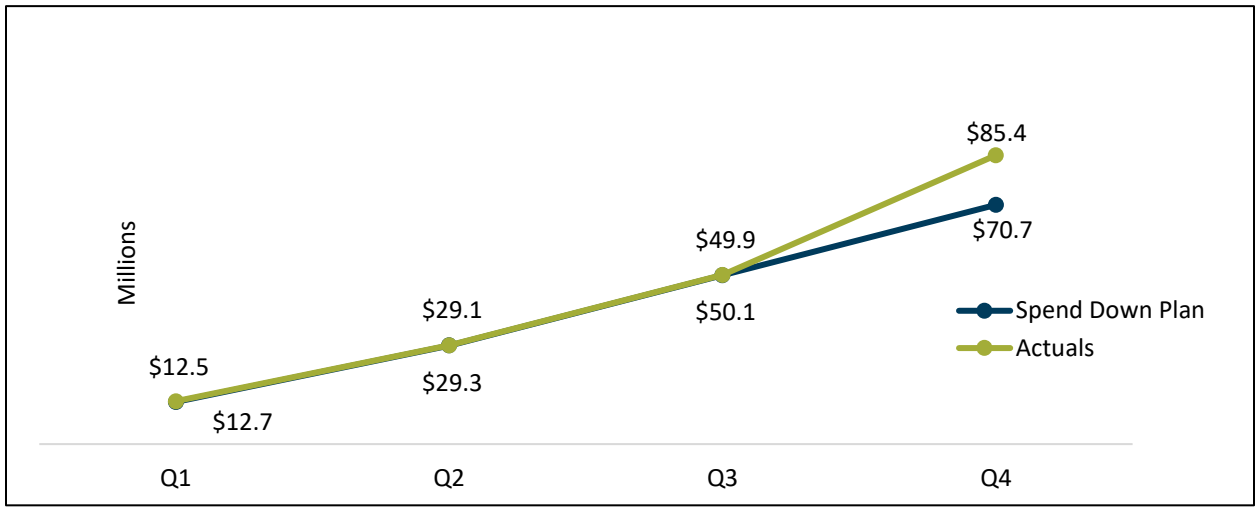
Washington County

Washington County originally budgeted $86 million for fiscal year 2023-24 and amended the budget to $96.2 million in response to Metro's fall 2023 revenue forecast. The county spent $96.2 million, representing 100 percent of its approved budget. The county had an ending balance of $129.2 million in resources by the end of year three.

In year three, carryover funds from the previous two program years were invested in eviction prevention services, shelter capital projects, technical assistance and capacity building grants for providers, and the development of an addiction treatment center. Remaining carryover funds are fully committed or assigned to one-time investments in eviction prevention and capacity building for providers, or capital investments in transitional housing, access centers and permanent emergency shelters.

Figure 12.15 shows the county's planned program expenditures versus actuals for year three. The spend-down plan is based on the percentage of funding the county planned to spend each quarter on program costs. This does not include spending on built infrastructure, contingency or reserves. Washington County's program expenditures exceeded its spend-down plan, with total actual expenditures at 121 percent of the expected amount.

Figure 12.15 Washington County year three spend-down plan versus actuals



Figures are cumulative and exclude built infrastructure.

Spending by population

The SHS fund serves two primary populations: Population A – defined as people who have experienced literal homelessness for extended periods of time, have a disability and little to no income, and Population B – defined as people who are experiencing or have a substantial risk of experiencing homelessness.

As defined by the SHS measure, 75 percent of SHS investments over the life of the fund are expected to be dedicated to meeting the housing and service needs of Population A, while 25 percent of the investments may be dedicated to housing and services that address the needs of Population B.

In preparation for the year three annual reports, Metro staff provided the counties with a financial reporting template and detailed guidance for reporting on Population A and B expenditures. The data submitted in counties' year three reports did not align with Metro guidance and revealed inconsistencies in the counties' service type categorizations, allocation methodologies, assumptions and definitions that made it impossible to roll up the data into a regional analysis. Work is underway to address these issues moving forward. As a first step, Metro and the counties developed a modified template for reporting year three data, which is summarized in Figure 12.16.

Figure 12.16 Fiscal year 2023-24 program area spending by Population A and B

	Clackamas County[3]		Multnomah County		Washington County	
	Pop A	Pop B	Pop A	Pop B	Pop A	Pop B
Shelter, outreach and safety on/off the street	73%	27%	68%	32%	61%	39%
Short-term housing assistance	10%	90%	46%	54%	20%	80%
Permanent supportive housing services	74%	26%	85%	15%	78%	22%
Long-term rent assistance	74%	26%	92%	8%	78%	22%
Long-term rent assistance admin	74%	26%	92%	8%	78%	22%
Other supportive services			72%	28%	80%	20%
Total spending	**61%**	**38%**	**71%**	**29%**	**55%**	**45%**

Leverage

The services funded by the SHS tax are just one component of the region's broader homeless services system. In fiscal year 2023-24, the counties also budgeted an additional $177.2 million in local, state and federal funding that supported services and outcomes not featured in this report. In Multnomah County, SHS represented 64 percent of fiscal year 2023-24 funding while in Clackamas and Washington counties it represented more than 90 percent.

Figure 12.17 Fiscal year 2023-24 funding for homeless services (in millions)

	Clackamas County	Multnomah County	Washington County	Regional total
SHS funding	162.0	271.5	225.4	658.9
Other funding	16.0	150.6	5.6	172.2
Total funding	178.0	422.1	230.9	831.1
% represented by SHS	91%	64%	98%	79%

Counties' non-SHS resources come from a range of local, state, federal and private funding sources. Some of the sources are common across all three counties while others are unique to a specific county. Examples include:

- Federal funding: Department of Housing and Urban Development Continuum of Care (HUD CoC), American Rescue Plan Act (ARPA), Emergency Solutions Grants, Emergency Housing Voucher

[3] Clackamas County's Population A and B data for some programs are extrapolations due to incomplete data.

- State funding: Executive Order 23-02, House Bill 5019, Senate Bill 5511, State Homeless Assistance Program
- Local funding: County General Funds, City of Portland General Fund, Multnomah County Visitor Development Fund, Washington County Public Services Levy
- Other funding: Kaiser and Care Oregon grants, opioid settlement funding

These non-SHS funding sources support a wide range of programs including permanent supportive housing, rapid rehousing, rent assistance, transitional housing, shelter, outreach, supportive services, eviction prevention, safety services, housing and services for specific populations such as youth and veterans, recuperative care and housing for people with behavioral health needs.

Funding from these other sources expands the impact of SHS funding. For example, all three counties receive HUD CoC funding to support their Homeless Management Information Systems and coordinated entry systems. These systems are essential to the effective administration of SHS-funded housing and services.

Counties also leverage SHS funding to expand the impact of these other funding sources. For example, the influx of SHS funding in Clackamas County has made it possible to shift state and county resources to fund new services in historically underserved rural areas outside of Metro's boundary. Multnomah County has used SHS funding to support the staffing capacity needed to manage the disbursement of ARPA-funded rent assistance, enabling culturally specific organizations to effectively reach vulnerable populations to prevent evictions and stabilize families. Washington County is using SHS funding to replace temporary shelter capacity funded by other sources with permanent year-round shelters.

Non-displacement of funds

Metro's agreements with the three counties require that SHS funds do not displace existing county-provided general funds for supportive housing services. Counties' fiscal year 2023-24 financial reports submitted to Metro showed no displacement of funds.

LOOKING AHEAD

Metro staff will work in collaboration with the oversight committee, county partners, service providers and the tri-county planning body to move forward the oversight committee's 2025 recommendations while strengthening overall oversight and monitoring of the SHS fund over the upcoming year.

Metro's SHS team will provide the oversight committee with a comprehensive work plan by summer 2025 that summarizes next steps for advancing the committee's 2025 recommendations and implementing the elements from the committee's previous recommendations that have not yet been completed. To inform the work plan, Metro will facilitate a process for the committee to assess, update and re-prioritize its previous recommendations as needed.

Over the next year, Metro will provide the committee with regular reports on work plan progress to support the committee's oversight role.

EXHIBIT A: GLOSSARY OF TERMS

Administrative costs: Metro recommends no more than five percent of SHS program revenue to cover the costs of each county's program administration. County administrative costs are those related to managing the program, not delivering services. Examples include senior management personnel, accounting, insurance, procurement, and other costs that are not attributed to a particular SHS program or program delivery.

Carryover funds: Funding remaining from one fiscal year that is "carried over" and used in a future fiscal year. One-time carryover results from higher than expected revenue or lower than expected spending. Recurring carryover results from the timing of revenue flow, such as fourth quarter tax collections.

Contingency funds: An account that is established to provide resources for emergency situations or unplanned program expenditures that, if left unattended, could negatively impact service delivery. Counties may establish contingency accounts that do not exceed five percent of budgeted program funds in a given fiscal year.

Coordinated entry: A systemwide intake and assessment process that uses standardized tools to connect people experiencing a housing crisis to services and resources that best fit their specific situation and needs.

Homelessness: An individual or family who lacks a fixed, regular and adequate nighttime residence including:

- Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason; are living in motels, hotels, trailer parks or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals
- Individuals or families who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings. This includes individuals or families who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations or similar settings.

Local implementation plan (LIP): A plan developed through extensive community engagement that defines a county's priorities and goals for supportive housing services program activities and investments.

Measure 26-210: A ballot measure approved by voters in May 2020 that creates a new regional tax to fund supportive housing services.

Metro affordable housing bond: A 2018 voter-approved bond that provides capital funding to support affordable housing development across the region.

Metro supportive housing services work plan: A plan developed by Metro with community input to guide implementation of the regional fund.

Permanent supportive housing (PSH): Permanent housing with supportive services to assist people with a disability who have experienced long-term homelessness to achieve housing stability.

Populations A and B: The SHS fund serves two primary populations: 75 percent of SHS investments are expected to be dedicated to services for Population A, defined as people who are extremely low income, have one or more disabling conditions, and are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness; 25 percent of SHS investments may be dedicated to services for Population B, defined as people who are experiencing or have a substantial risk of experiencing homelessness.

Procurement: The process by which county governments secure the services needed to support SHS implementation by identifying and contracting with qualified service providers. Each county's procurement procedures are strictly regulated to promote responsible stewardship of tax-funded resources.

Rapid rehousing: Programs that provide short and medium-term rent assistance, typically up to two years, with targeted services to help people who have recently fallen into homelessness to find and maintain stable housing.

Regional investment fund (RIF): A fund created through a five percent set-aside from each county to be used for regional supportive housing services strategies.

Regional long-term rent assistance (RLRA): A regional program that subsidizes the cost of rent so that households with very low incomes can afford housing.

Stabilization reserve: Counties are required to establish a stabilization reserve to protect ongoing services from the impact of revenue fluctuations. The target minimum reserve level is equal to 10 percent of budgeted program funds in a given fiscal year. Reserves must be fully funded within the first three years of implementation.

Supportive housing services regional oversight committee: A community committee established to provide transparent oversight of the supportive housing services fund on behalf of the Metro Council.

Tri-county planning body (TCPB): A community committee established to set regional priorities and guide implementation of the regional investment fund.

EXHIBIT B: SHS REGIONAL GOALS AND OUTCOME METRICS

Metro's supportive housing services work plan defines the SHS fund's regional 10-year goals and provides a set of detailed outcome metrics related to the goals. Comprehensive data on the goals and outcome metrics is included throughout the report by topic. The tables below provide an index of the goals and outcome metrics, how they are measured, and where those data are located in the report.

Housing stability

Regional goals

Goal	Data	Page
Housing equity is advanced by providing access to services and housing for Black, Indigenous and people of color at greater rates than Black, Indigenous and people of color experiencing homelessness.	Percentage of people of color experiencing homelessness compared with people served through SHS-funded housing placements and homelessness preventions	6-7, 34-36
Housing equity is advanced with housing stability outcomes (retention rates) for Black, Indigenous and people of color that are equal or better than housing stability outcomes for non-Hispanic whites.	Retention rates for households in SHS-funded permanent supportive housing and rapid rehousing disaggregated by race/ethnicity	7
The disparate rate of Black, Indigenous and people of color experiencing chronic homelessness is significantly reduced.	Percentage of people of color experiencing chronic homelessness compared with people of color in Population A served through SHS-funded housing placements and homelessness preventions	7-8

Outcome metrics

Outcome metric	Data	Page
Number of permanent supportive housing (PSH) units created and total capacity, compared to households in need of permanent supportive housing.	Number of SHS-funded PSH units/vouchers added since July 1, 2021 compared to number of households in need of PSH	9-10
Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year. This will measure programmatic inflow and outflow.	Average monthly homeless services system inflow and outflow	10
	Race/ethnicity of people experiencing homelessness compared with people placed into stable housing	34-36
Number of housing placements and homelessness preventions, by housing intervention type and priority population type. This will measure people being served.	Number of housing placements and homelessness preventions by housing intervention type	11-14
	Housing placements and homelessness preventions by housing intervention type disaggregated by race/ethnicity	17-18

Outcome metric	Data	Page
	Housing placements and homelessness preventions by housing intervention type disaggregated by Populations A and B	16
Housing retention rates. This will measure if housing stability is achieved with supportive housing.	Retention rates in PSH and rapid rehousing	13-14
	Retention rates in PSH and rapid rehousing disaggregated by race/ethnicity	7
'Length of homelessness' and 'returns to homelessness'. These will measure how effectively the system is meeting the need over time.	Average length of time homeless for households served in SHS programs	16-17
	Average rate of returns to homelessness for households served in SHS programs	14
Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice. This will measure leveraged impact of funding in each county.	Funds and services leveraged through coordination with capital investments and other service systems	26-28
	Funds and services leveraged through other local, state and federal funding sources	61-62

Equitable service delivery

Regional goals

Goal	Data	Page
Increase culturally specific organization capacity with increased investments and expanded organizational reach for culturally specific organizations and programs.	Number of culturally specific providers contracted with to provide SHS-funded services and total value of contracts over time	8, 20
	Investments in culturally specific organization capacity building and technical assistance	22-24
All supportive housing services providers work to build anti-racist, gender-affirming systems with regionally established, culturally responsive policies, standards and technical assistance.	Training, capacity building, technical assistance and monitoring of supportive housing services providers to ensure services are anti-racist, culturally responsive and gender-affirming	22-25, 32-34

Outcome metrics

Outcome metric	Data	Page
Scale of investments made through culturally specific service providers to measure increased capacity over time.	Number of culturally specific providers contracted with to provide SHS-funded services and total value of contracts over time	8, 20
Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages.	Surveys of contracted providers' pay rates for direct service roles and distribution of pay	24

Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience.	Surveys of contracted providers' staff diversity	33

Engagement and decision making

Regional goals

Goal	Data	Page
Black, Indigenous and people of color are overrepresented on all decision-making and advisory bodies.	Representation by people of color in decision-making and advisory bodies	9, 33
Black, Indigenous and people of color and people with lived experience are engaged disproportionately to inform program design and decision making.	Representation by people of color and people with lived experience in opportunities to inform program design and decision making	34

Outcome metrics

Outcome metric	Data	Page
Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness.	Percent of advisory and oversight committee members who identify as people of color or as having lived experience of housing instability or homelessness	9, 33

EXHIBIT C: PROGRESS REPORT ON OVERSIGHT COMMITTEE'S 2024 RECOMMENDATIONS (DECEMBER 2024)

PROGRESS TO DATE	
Complete	This task has been completed.
In progress	This task is underway.
On hold	This task is on hold.

Category 1: Regional communication and engagement

Strengthen understanding: Create and implement a robust regional communication strategy for the SHS fund that effectively reaches the broader community. The strategy should help the community understand the complexity of homelessness, the nature and goals of the SHS fund, and communicate progress, successes and challenges in a manner that is easily accessible and understandable by the general public. Metro should fund and lead the development of the regional strategy in collaboration with jurisdictions and nonprofit providers and manage the strategy's implementation.

The regional strategy should include:

- A timeline and roll out plan that reflect the urgency of the work
- Collaboration and coordination between Metro, counties and community-based partners to build on the communications work already happening at the county level, share learnings across jurisdictions and align on regional messaging
- Methods for getting the message out through a wide range of channels and mediums designed to reach diverse audiences
- A commitment to provide accurate and trustworthy regional data and information to the community
- Clear communication on progress in meeting the SHS fund's regional goals for housing placements and racial equity
- Communication support to counties and nonprofit providers in the form of technical assistance and access to the Metro communications team
- Incorporation of community engagement strategies to gather input and feedback, hear the perspectives of stakeholders and community members, and promote shared understanding

Task	Lead(s)	Timeline and deliverables	Progress to date
Create communication strategy	Metro staff (communications)	**Winter 2025** – Strategy created (with consultant – see above)	This is ongoing work in collaboration with the consultant, who will be brought on in winter 2025.
Contract with external communications experts to help design campaign	Metro staff (communications)	**Early Winter 2025** – RFQU released **Jan/Feb 2025 (tentative)** – Plan drafted for stakeholder review	The RFQU is being finalized now. It is expected to be released Winter 2025.

Implement communication strategy	Metro staff (communications)	**Spring 2025** – Strategy fully implemented	This work will advance once the strategy, to be developed by Metro with the support of the consultant, is developed.
Offer communication support to jurisdictions and nonprofit providers	Metro staff (communications)	**Ongoing**	In addition to collaborating as part of the development of the larger strategic communications plan, Metro is engaging with county partners regularly to discuss updates, additional opportunities for collaboration, and needs. Metro is about to reconvene a broader regional housing communications quarterly meeting that includes Clackamas, Multnomah and Washington counties, Beaverton, Hillsboro, Portland, Home Forward and HUD. The meetings will consist of expert panels and presentations followed by group discussions around regional communications strategies.

Category 2: Financial and data transparency and accountability			
Optimize financial reporting: Strengthen strategic oversight and accountability by improving the quality, clarity and consistency of regional financial reporting. Priority areas for Metro's work include: • Work with counties to lead the development of tools, definitions and methodologies for measuring and reporting on spending by Populations A and B and release guidance to ensure accurate and reliable data are provided in counties' year three annual reports • Support the development of tools and methodologies for tracking future financial obligations such as long-term rental assistance payments • Align financial reporting categories with programmatic reporting to support analysis and oversight • Provide clearer information to the oversight committee on allocations of SHS funding to reserves and contingencies • Expand reporting to the oversight committee on tax collections to include collection challenges			
Task	**Lead(s)**	**Timeline and deliverables**	**Progress to date**
Development of tools, definitions and methodologies for measuring and reporting on spending by Populations A and B	Metro staff (oversight and accountability)	**April / May 2024** – Tools and definitions / methodologies developed **October 2024** – FY24 reports due	Metro provided the counties with definitions and methodologies for measuring and reporting on spending by Populations A and B in June 2024. Updated financial reporting was required by counties for FY24 annual reports. Other improvements, including changes to standardized data collection in HMIS, are underway and will be included in FY25 annual reports.
Release guidance for Populations A and B in FY24 annual reports	Metro staff (oversight and accountability)	**May 2024** – Fully incorporated into annual reporting templates	The annual report template was updated and shared with the counties at the end of June for use in FY24 annual reports.
Support the development of tools and methodologies for tracking future financial obligations such as long-term rental assistance payments	Metro staff (finance)	**Fall 2024** – Financial planning tool developed **Spring 2025** – Presentation from CSH	Metro has contracted with the Corporation for Supportive Housing (CSH) to support our emerging PSH work, including forecasting costs of PSH more broadly. CSH and staff are currently working to finalize a financial planning tool that will help us scope PSH funding across the region. This information will be presented to the oversight committee in spring FY25.
Align financial reporting categories with programmatic reporting to support analysis and oversight	Metro staff (oversight and accountability)	**Summer 2024** – Financial workbook is updated	The financial workbook has been updated for FY25.

Provide clearer information to the oversight committee on allocations of SHS funding to reserves and contingencies	Metro staff (finance)	**May 2024** – Incorporated into financial reporting	More information on allocation of SHS funding to reserves and contingencies was included in the FY24 Q3 financial reports. It is now shared on a quarterly basis.
Expand reporting to the oversight committee on tax collections to include collection challenges	Metro staff (finance)	**May 2024** – Incorporated into financial reporting	The finance team is identifying these issues and communicating with the committee through monthly tax collection and disbursement updates as challenges come up.

Enhance data integrity: Strengthen the accuracy, reliability and consistency of program data to support regional analysis and oversight. Priority areas for Metro's work include:

- Provide up-front guidance and support to counties on definitions and methodologies to increase the accuracy, reliability and consistency of quarterly and annual reports
- Clearly define the SHS fund's 10-year goals and align programmatic reporting and definitions with the goals to support clearer tracking on progress
- Strengthen regional methodologies for contextualizing SHS outcomes in relation to overall regional and county-level need; this includes calculating returns to homelessness, inflow and outflow, and methodologies for comparing SHS data with homeless population data
- Incorporate methodologies and tools into reporting templates to capture data on street outreach including contact rates, coverage, and placement in housing and services
- Provide user friendly summary information on program data and quarterly report progress to support the committee's oversight role
- Work with the counties to develop systems and technologies for regional data collection that meet the needs of providers and counties while supporting Metro's regional oversight responsibilities

Task	Lead(s)	Timeline and deliverables	Progress to date
Provide up-front guidance and support to counties on definitions and methodologies to increase the accuracy, reliability and consistency of quarterly and annual reports	Metro staff (oversight and accountability)	**Ongoing**	The annual report template was updated with clearer definitions and methodologies for counties to use for their FY24 annual reports, which Metro received in October 2024. Data staff will continue to refine guidance as need arises. One recent example of this work is how Metro and the counties have aligned with how shelter units are being reported, counted and displayed regionally.
Clearly define the SHS fund's 10-year goals and align programmatic reporting and	Metro staff (oversight and accountability)	**July 2024** – All tools reflect clearer goals	This work has been done. The counties received communication on this update at the end of June.

definitions with the goals to support clearer tracking on progress			
Strengthen regional methodologies for contextualizing SHS outcomes in relation to overall regional and county-level need	Metro staff (oversight and accountability)	**Ongoing**	The annual report template was updated to provide much clearer regional methodologies to counties. PIT (Point in Time) estimates which align with SHS race and ethnicity reporting were obtained from HRAC, and Counties are beginning to standardize equity analysis using American Community Survey data. Data staff will continue to refine guidance as need arises.
Incorporate methodologies and tools into reporting templates to capture data on street outreach including contact rates, coverage, and placement in housing and services	Metro staff (oversight and accountability)	**June 2024** – Annual reporting template updated **October 2024** – Quarterly reporting template update **Fall 2024** – Data use agreement executed **February 2025** – Data shared	The annual report template was updated with clearer outreach system capacity, contacts, and outcomes. Quarterly reporting templates were updated in fall 2024 and include number of people served and number of people engaged in street outreach. The oversight committee will begin to see these changes in the FY25 Q2 report in February. Metro will get street outreach data through Data Use Agreement as well, which is expected to be executed in fall 2024. We will get the first data through the agreement in February 2025.
Provide user friendly summary information on program data and quarterly report progress to support the committee's oversight role	Metro staff (oversight and accountability)	**Ongoing**	The quarterly reporting template has been updated with more-informative summary measures of program activity. Data visualizations and dashboards have been developed within the SHS oversight and accountability team, and work is underway to begin supplying them to stakeholders including Metro management, the Metro Council, and the oversight committee in FY25. The progress dashboard was updated to achieve closer alignment with auditor recommendations and more-accurately track counties' progress and SHS outcomes, including the shift to displaying households instead of people served.

Work with the counties to develop systems and technologies for regional data collection	Metro staff (oversight and accountability)	**Ongoing**	This work has started with providing regional HMIS data collection guidance for counting Population A and B with distinct HMIS data elements. Other work includes continued conversations around reporting specifications for counting 'households' regionally and moving away from the 'Alone or in Combination' method for Race/Ethnicity counting. The SHS oversight and accountability team has been collaborating with and attending all of the Housing and Health Care integration sessions, with the goal of moving towards a more regional "Coordinated Entry" system. The regionalization of this work includes HMIS Data Elements, HMIS visibility settings, and collecting client characteristics on Population A and B.

Evaluate to inform improvement: Evaluate regional progress and refine strategies and goals as needed to maximize SHS outcomes. Priorities for Metro's work include:

- Support the collection and analysis of process and outcome metrics to inform continuous improvement in program design, strategy refinement and data-driven decision-making
- Develop a framework for assessing service quality, service delivery methods and fidelity to established standards of practice to identify areas for improvement
- Develop a framework for assessing the SHS fund's progress in achieving its racial equity goals at a regional level

Task	Lead(s)	Timeline and deliverables	Progress to date
Support the collection and analysis of process and outcome metrics	Metro staff (oversight and accountability)	**October 2024** – Template updated **February 2025** – First updated quarterly report received	The quarterly reporting template has been updated to include more substantive process and outcome data from the counties. The oversight committee will begin to see these changes in the FY25 Q2 report in February.
Develop a framework for assessing service quality, service delivery methods and fidelity to established standards of practice	Metro staff (oversight and accountability)	**May 2024** – IGA executed with PSU **Fall 2024** – Monitoring policies finalized	In addition to the monitoring work that Metro will begin winter 2025, which will enable us to assess, among other things, service delivery methods and fidelity to established standards of practice. Metro housing is also developing a performance measure to measure quality of services provided. This work will happen through contracting with PSU's Homelessness Research & Action

		Winter 2025 – Monitoring to begin	Collaborative. This scope of work, including the timeline, is being built out.
Develop a framework for assessing the SHS fund's progress in achieving its racial equity goals	Metro staff (oversight and accountability)	**Ongoing**	The Metro housing department hired an equity manager in February 2024. The department is working to develop a process for utilizing a racial equity lens tool (RELT) for all decision-making across the department and a framework for assessing the department's process toward achieving its equity goals. Once a more detailed timeline is developed, it will be shared.

Category 3: Workforce and capacity issues			
Address providers' workforce and capacity needs: Develop a regional work plan reflective of community-identified needs with timelines that incorporate short-term and long-term strategies for addressing workforce and capacity issues. The work plan should consider the following: • Multi-year capacity building investments • Regional training and capacity building support for providers • A particular focus on meeting the needs of small, emerging and culturally specific providers • An assessment of the current guidelines for allocation and use of administrative funds to ensure that providers' expenses necessary to administer SHS programs are covered • Regional strategies to support livable wages for direct service staff • Additional supports for existing staff (e.g. mental health and wellbeing) to increase staff retention • A framework for regular monitoring and evaluation			
Task	**Lead(s)**	**Timeline and deliverables**	**Progress to date**
Develop a regional work plan	Metro staff (regional capacity)	**July 2024** – Regional capacity team fully staffed (6 FTE) **November 2024** – Draft recommendations to TPCB **December 2024** – Informational presentation to SHSOC **March 2025** – Implementation plan presented to SHSOC	The Metro Regional Capacity Team continues to work to scale up and improve systems capacity for the region's homeless services providers. In July, the qualified vendor list for the tri-county, Metro RFQu was posted and 67 businesses, service providers and consultants qualified to provide services. This list will serve as the basis for regional technical assistance work in the coming years. The team is also developing a baseline of trainings, skill sets and learning outcomes to support incoming frontline housing and homeless service workers. Research is underway that includes meeting with all the region's local colleges, community colleges, universities and workforce boards to identify potential pathways for an existing or new program, as well as identifying the trainings and skillsets that providers and jurisdictions believe are necessary for incoming workers to have access to. Additionally, the team is launching a technical assistance demonstration project focused on adding capacity to the region's Permanent Supportive Housing providers and measuring effectiveness of technical assistance interventions with a focus on the needs of residents of

			color in PSH buildings. The RFQu went live in November and will close in January.

<u>Provide multi-year capacity building funding</u>: Develop and implement a regional strategy for providing multi-year capacity building investments for service providers:

- Complete Metro's feasibility assessment with the counties to determine how multi-year capacity building investments can be made
- Work collaboratively with counties to problem solve to address any administrative hurdles to developing multi-year grants
- Design a regional strategy to provide multi-year capacity building investments for service providers, with a particular focus on culturally specific, small and emerging providers
- Report back to the committee with funding requirements, expected outcomes, potential funding commitments and an implementation timeline

Task	Lead(s)	Timeline and deliverables	Progress to date
Work collaboratively with counties to problem solve to address any administrative hurdles to developing multi-year grants	County partners	**FY 2024** – Develop and implement multi-year capacity building investments	In FY24, the counties were at different stages with this work. Clackamas County provided multi-year contracts/investments to providers, and in FY25, Washington County plans to make high-performing organizations (based on the county's Annual Performance Evaluation) eligible to receive multi-year contracts in the form of three-year contract allocations. Multnomah County explored opportunities for multi-year capacity building funds. Metro and the counties will continue to explore opportunities and challenges with the expansion of this work.

<u>Institute livable wages</u>: Address service provider wage/compensation equity to provide better guidance to county partners in meeting their SHS equity goals and to develop more consistency in wage standards across the region:

- Develop strategies in collaboration with jurisdictions and local and state stakeholders that take into account the distinct context and challenges of implementation in each county
- Prioritize the needs of small, emerging and culturally specific providers
- Work collaboratively with counties to problem-solve strategies to address any administrative hurdles to providing county contracts that enable service providers to pay livable wages to direct service staff

Task	Lead(s)	Timeline and deliverables	Progress to date
Develop strategies in collaboration with jurisdictions and local and state stakeholders that prioritize the needs of small, emerging and culturally specific providers	Tri-county planning body	**June/July 2024 –** Progress Update: Homebase National scan and preliminary concepts presented to TCPB along with County updates **February/March 2025 –** Update provided to SHSOC **Spring/Summer 2025 –** Implementation plan presented to SHSOC	Metro is working with Homebase, Counties, and partners to develop strategies in support of this TCPB goal: "County contracts for SHS funded agencies and providers will establish standards throughout the region to achieve livable wages for direct service staff." In September 2024, a tri-county workgroup was launched to draft a regional plan. Metro and the Counties will provide an informational update on this goal area to the oversight committee in February or March 2024. The Employee Recruitment and Retention regional implementation plan is currently scheduled to be written and come to the TCPB for approval in May 2025, followed by review and approval by the oversight committee. Outreach and engagement with providers and local and state workforce entities is ongoing. The workgroup is monitoring other state contracting-related initiatives that would support this goal area.
Work collaboratively with counties to problem-solve strategies to address any administrative hurdles	Tri-county planning body		Pending the development of strategies.

Streamline county administrative practices: Work collaboratively with the counties to support the development of systems for managing procurements, contracts and spending that match the urgency of the crisis. This includes:

- Creating more nimble and responsive administrative practices that are able to leverage the SHS fund's unprecedented flexibility
- Streamlining contract administration practices to better support provider capacity and expedite program implementation
- Promoting payment practices that provide up front funding to support program start-up costs and expedited payments during implementation, particularly for small, emerging and culturally specific providers

Task	Lead(s)	Timeline and deliverables	Progress to date
Identify needs within current systems	County partners		The counties recognized the needs and improved their contract administration processes. Washington County made improvements in FY24 to streamline the invoice process and reduced the average invoice processing time down to 18 days. Clackamas County reported that in FY

			2023-24, Housing and Community Development paid 82% of invoices within a 30-day period. For Multnomah County, a recent recognized the Joint Office for leading the County in timely invoice payments; in May 2024, about 94% of invoices were paid within their contract's payment terms. Metro and the counties will continue to evaluate their progress and challenges in this area, and develop additional strategies as needed.

Category 4: Program expansions			
<u>Expand access to health and behavioral health services</u>: Continue work to identify and implement regional strategies that facilitate integration of health services, with a focus on behavioral health including mental health and recovery support services: • Prioritize the needs of people of color and LGBTQ+ households in accessing health and behavioral health services • Integrate health and behavioral health services into outreach, shelter, housing navigation, short-term housing and permanent housing, including strengthening crisis and long-term supports • Continue to provide regional oversight and coordination to strengthen system-level integration and support county and program-level integration strategies • Expand reporting on ongoing work to integrate health and behavioral health services in SHS programming at all levels (project-level, county-level and regional)			
Task	**Lead(s)**	**Timeline and deliverables**	**Progress to date**
Identify regional strategies	Tri-county planning body	**July 2024 –** Landscape review complete **January 2025 –** Update provided to SHSOC **February 2025 –** Implementation plan presented to SHSOC (tentative)	The regional planning workgroup with Health Share, Counties, and Metro, with support from Homebase, has begun drafting a regional implementation plan using a shortlist of potential strategies. The TCPB goal is "Greater alignment and long-term partnerships with healthcare systems that meaningfully benefit people experiencing homelessness and the systems that serve them." The implementation plan will focus on a few key regional opportunities to support, supplement, and advance existing health and housing system alignment initiatives. The draft implementation plan will be refined over the coming months with regional leadership, providers, and other partners. The plan is currently scheduled to come to the TCPB for approval in January 2025, followed by an update to the oversight committee in January and a vote in February.
Implement regional strategies	Tri-county planning body		Pending the development of strategies.
<u>Strengthen implementation of new programs</u>: Monitor implementation of new and expanded program areas to support accountability and effectiveness: • Monitor program areas that did not meet regional or county-level year-two goals, particularly rapid rehousing, to assess whether they will meet their goals in year three and provide oversight and problem-solving support as needed			

• Monitor cross-sector alignment and programming to assess the need for regional strategies to support integration of wraparound supports such as employment, workforce and education			
Monitor and assess program areas that did not meet regional or county-level year-two goals	Metro staff (oversight and accountability)	**Fall 2024** – Monitoring policies finalized **Winter 2025** – Monitoring to begin	Metro increased its quality improvement and data capacity significantly in FY24. In addition to more thorough analysis of quarterly and annual reports as they relate to county-level and regional goals, Metro will start more in-depth monitoring of the counties in winter 2025.
Monitor and assess cross-sector alignment and programming	Metro staff (oversight and accountability)		In addition to the opportunities for increased assessment of programming through monitoring, Metro staff has already increased our assessment of quarterly progress, challenges, and concerns. Each county receives a performance review letter from Metro each quarter with clarifying questions, requests for additional data, and overall assessment from Metro. Needs for additional quarterly monitoring will be assessed once the updated quarterly reporting template is in place and updated reports are received from the counties in February 2025.

Category 5: Outreach			
Promote comprehensive outreach: Increase the visible impact of SHS investments through outreach strategies that are scaled to match the need: • Provide information to support the oversight committee's monitoring of counties' outreach work, including the scale and scope of outreach efforts, who is being reached and the outcomes • Work collaboratively with counties to identify opportunities to expand outreach strategies as needed to support a robust regional infrastructure for reaching the unsheltered population and connecting them with services			
Task	**Lead(s)**	**Timeline and deliverables**	**Progress to date**
Provide information to support the oversight committee's monitoring of counties' outreach work	County partners	**February 2024** – Updated annual work plan template released **September 2024** – FY25 work plans finalized **October 2024** – Updated quarterly reporting template released **February 2025** – Improved outreach data included in quarterly reports	Starting with FY25, the counties all provided outreach goals in their annual work plans. The quarterly reporting template has been updated to include outreach progress, including number of people / households served, demographic data, and funds spent. The oversight committee will begin to see this data in the FY25 Q2 report in February.
Work collaboratively with counties to identify opportunities to expand outreach strategies as needed	County partners		Pending more data and analysis of outreach strategies starting FY25 Q2.

EXHIBIT D: PROGRESS REPORT ON TRI-COUNTY PLANNING BODY REGIONAL GOALS (DECEMBER 2024)

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.

Work to date: Metro, the counties and Health Share collaborated during 2024 to develop regional strategies to advance existing work to better integrate healthcare and housing across the region. This regional collaboration will launch in 2025 with strong momentum to accelerate work already underway to leverage Medicaid funding, establish regional care coordination and cross-sector case conferencing, advance data-sharing infrastructure and more. This systems change effort will better connect people to care and establish pathways and partnerships between systems to address the physical and behavioral health needs of SHS populations.

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.

Work to date: Metro and the counties are working to develop regional strategies to address this urgent and challenging goal. They are exploring ways to build on and regionalize progress already made by the counties on employee recruitment and retention, including contract standards, capacity building and more, while recognizing that this is a systemic issue that exceeds currently available resources.

Regional coordinated entry

Goal: Coordinated entry is more accessible, equitable and efficient for staff and clients.

Work to date: Coordinated entry is the system through which people experiencing homelessness are connected to all available housing resources. The TCPB approved the Coordinated Entry Regional Implementation Plan (CERIP) on October 9, 2024. The plan was developed with Metro and county partners, and includes the following four strategies: regionalize visibility of participant data, align assessment questions, regionalize approaches to prioritization or racial equity, and regionalize an approach to case conferencing. Work on all four of these strategies is ongoing. The full CERIP can be found here: https://www.oregonmetro.gov/sites/default/files/2024/11/21/Coordinated-Entry-Regional-Implementation-Plan_0.pdf

Regional landlord recruitment

Goal: Increase the availability of readily accessible and appropriate housing units for service providers.

Work to date: The TCPB approved the Landlord Recruitment and Retention Regional Implementation Plan (LRRRIP) on March 13, 2024. The plan was developed with Metro and county partners, and includes the following five strategies: communication and education, align financial incentives, tracking and access to unit inventory, prioritize quality problem-

solving services, investigate needs for property management. Work on all five of these strategies is ongoing. The full LRRRIP can be found here: https://www.oregonmetro.gov/sites/default/files/2024/05/02/Regional-Landlord-Recruitment-Plan-20240301.pdf

Training

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

Work to date: Collaborating closely with county partners, Metro's regional capacity team has begun a research project to identify training pathways to ensure frontline housing and homeless service providers have access to the high-quality trainings they need to support clients. This has included surveying staff from Metro and county partners to identify the trainings and skills they believe are needed for service workers early in their careers, getting provider feedback on those training areas, and developing a research paper that analyzes the current training and educational landscape and identifies potential avenues (like post-secondary education) for scaling up trainings or developing a new certification for frontline workers. In the new year, the team will be testing the efficacy of on-demand trainings offered by Corporation for Supportive Housing and National Alliance to End Homelessness through a limited pilot project pairing a supervisor and frontline worker at 10 agencies throughout the region with seven on-demand trainings.

Technical assistance

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

Work to date: Each of the counties has developed a process for providers to access technical assistance in areas like human resources, finance and more. A key goal of Metro in this work is to add value and not duplicate services. Working closely with the counties, Metro's regional capacity team led and project managed a first of its kind request for qualifications for technical assistance providers that all four jurisdictions can now draw from. Metro is also spearheading a permanent supportive housing (PSH) technical assistance demonstration and research project, which aims to identify the strengths of PSH providers, benchmark their work to national best practices, and inform Metro's broader policy work to regionalize PSH implementation while helping to identify future pathways for technical assistance by pairing four PSH service providers from across the region with technical assistance consultants over the course of six months.

EXHIBIT E: COUNTIES' QUARTERLY AND ANNUAL REPORTS

Fiscal year 2023-24 SHS quarterly reports

Quarter 1

- Clackamas County
- Multnomah County
- Washington County

Quarter 2

- Clackamas County
- Multnomah County
- Washington County

Quarter 3

- Clackamas County
- Multnomah County
- Washington County

Quarter 4

- Clackamas County
- Multnomah County
- Washington County

Fiscal year 2023-24 SHS annual reports

- Clackamas County
- Multnomah County
- Washington County

EXHIBIT F: SHS REGIONAL ANNUAL FINANCIAL REPORT

FY 2023-24 Annual Financial Report

July 2023 – June 2024

Metro designed this financial report to provide the information necessary for the SHS oversight committee to monitor the financial aspects of the program. It includes details on tax collections and disbursements, county partner expenses, tax collection costs and administrative costs.

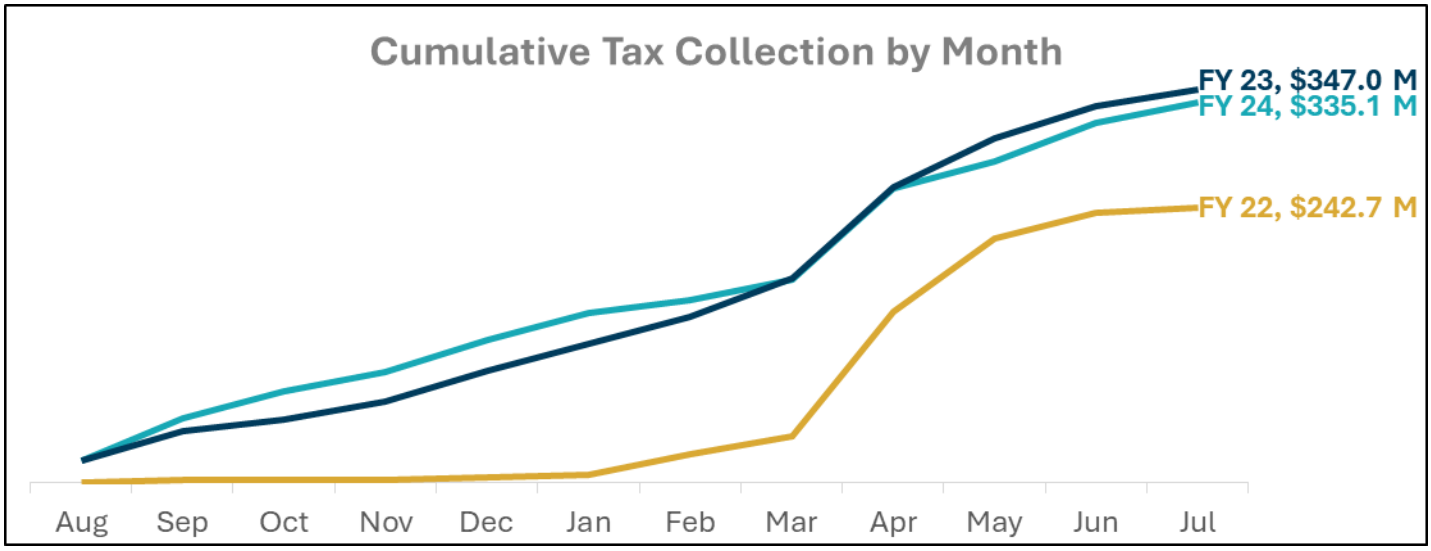
Year 3 Annual Financial Overview

Fiscal year (FY) 2023-24 represented the third full year of Supportive Housing Services Taxes collections. In the fall, Metro provided a forecast with more aggressive revenue estimates based on tax collections in the prior two years, the growth of the higher-income tax base indicated by state return data, and high revenue numbers early in the FY 2023-24 fiscal year. The year-end revenue number of $335.1 million is about 6% lower than the Fall 2023 forecast, which is within the margin of error that should be expected for these taxes. Likely, the single largest contributing factor was that the local economy has performed worse than anticipated a year ago, especially considering the nationwide growth that has occurred over the last 12-18 months. More information is available in the FY 2023-24 fiscal year-end report.

Original Budget	$234,100,000
Fall 2023 Forecast	$356,700,000
FY 2023-24 Actual Collections	**$335,136,020**
Deviation from latest forecast	*($21,563,980) (6%)*

Tax Collections

The following chart illustrates the trajectory of cumulative tax revenue collections for each fiscal year, which is shown as August to July (the month in which the revenue is collected



by the tax administrator) in alignment with generally accepted accounting principles.[4] After a very strong start, prompting the increase in forecasted revenue, FY 2023-24 collections were slightly lower than the prior year. However, tax revenue was still notably higher than originally budgeted. Counties' FY 2023-24 revenue totals include $309.8 million in tax collections and almost $350 million in prior year carryover plus other revenue (interest, grants and miscellaneous).

Tax Revenue Summary			
	FY 24 Budget	YTD Actuals	% of Budget
Tax Revenue (Including Interest)	**234,100,000**	**335,846,858**	**143%**
Tax Collection Costs (Amount Retained)	10,801,686	8,956,429	83%
Adjustment to Administrator Reserves	-	800,000	N/A
Net Tax Revenue	**223,298,314**	**326,090,429**	**146%**
Metro Admin Allowance (5%)	11,163,314	16,304,521	146%
County Partner Revenue	**212,135,000**	**309,785,908**	**146%**
Multnomah County	96,167,867	140,436,278	146%
Washington County	70,711,667	103,261,969	146%
Clackamas County	45,255,467	66,087,660	146%

Actual tax collection costs were lower than anticipated, and Metro will true-up the amount retained in FY 2024-25 (consistent with prior practice).

Tax Collection Costs			
	FY 24 Budget	YTD Actuals	% of Budget
Tax Collection Costs	**10,801,686**	**8,863,310**	**82%**
Personnel	5,026,047	4,353,578	87%
Software	3,602,815	3,480,948	97%
Other M&S	1,382,414	1,028,784	74%
Contingency	790,410	-	0%

[4] Tax collections are on an accrual accounting basis and reflect collections received by Metro and disbursed to county partners from September 2023 – August 2024. Tax collections by the tax administrator through July 2023, received by Metro and disbursed to county partners in August 2023, are recorded in FY23 since these tax payments are for income earned during that fiscal year. These figures are tax revenue only and do not include interest.

Administrative & Oversight Costs

The Supportive Housing Services Measure allows for up to 5% of net tax collections to cover the cost of Metro program administration and oversight. This includes the SHS team, as well as supporting operations like finance, legal, communications, IT and HR. Metro's expenditures are expected to ramp up over time as staff are hired into currently budgeted positions. Metro will continue to use carryover funds to support program growth in FY 2024-25, including one-time investments to provide necessary capacity for new and growing bodies of work and programmatic opportunities.

Metro Administrative Costs			
	FY 24 Budget	**YTD Actuals**	**% of Budget**
Prior Year Carryover	14,778,601	21,999,875	149%
YTD Admin Allowance (5%)	11,163,314	16,304,521	146%
Interest Earnings	300,000	971,150	324%
Total Resources	**26,241,915**	**39,275,547**	**150%**
Direct Personnel	5,416,344	2,708,611	50%
Materials & Services	3,306,251	1,090,429	33%
Indirect Costs (Allocation Plan)	3,370,894	3,370,894	100%
Contingency	-	-	N/A
Expense & Contingency	**12,093,489**	**7,169,934**	**59%**
Carryover to next period	**14,148,426**	**32,105,613**	

Metro recommends that each county's program administrative costs do not exceed 5% of SHS program revenue. This does not include the administrative costs of service providers or Regional Long-Term Rent Assistance (RLRA), which is tracked separately.

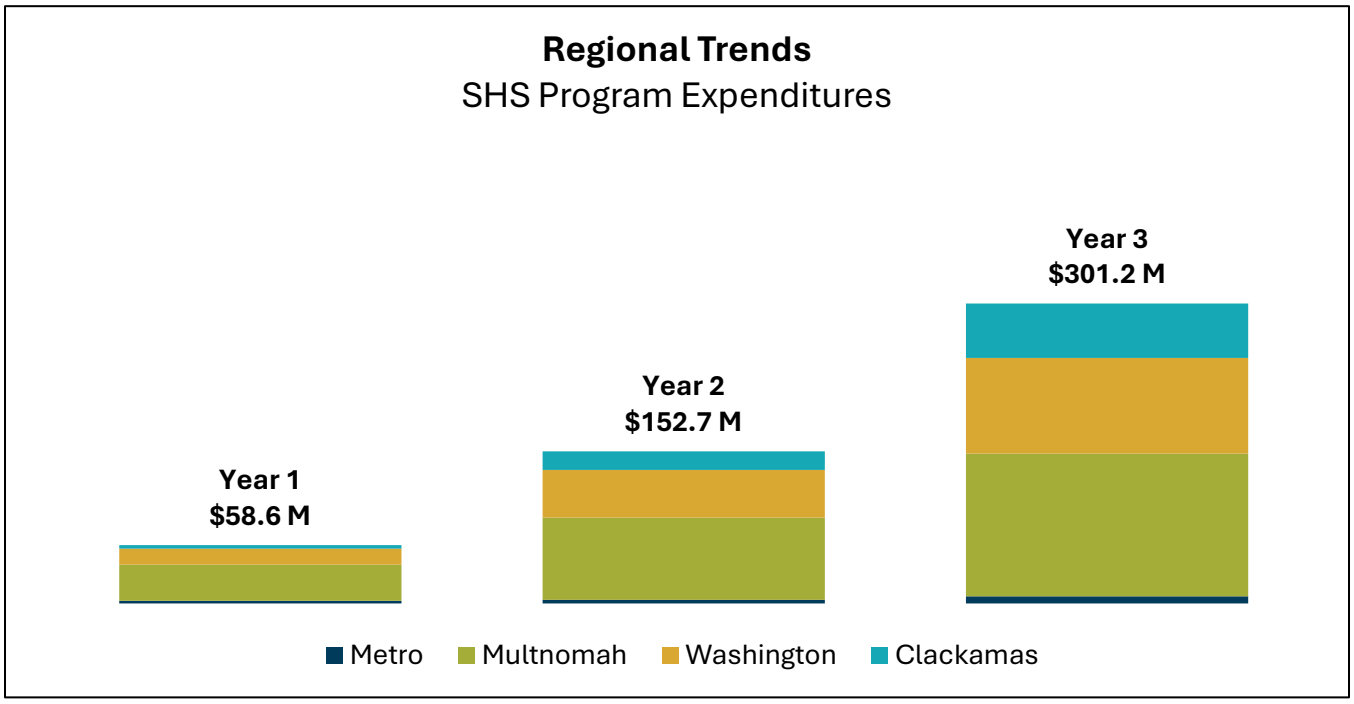
County SHS Administrative Costs				
	Clackamas County	**Multnomah County**	**Washington County**	**Total**
County Administrative Costs	2,796,445	2,234,769	1,989,490	**7,020,704**
% of SHS program revenue (recommended limit is 5%)	4%	2%	2%	**2%**

Long-term Rent Assistance Administrative Costs				
	Clackamas County	**Multnomah County**	**Washington County**	**Total**
RLRA Administrative Costs	624,213	597,194	424,089	**1,645,496**
% of RLRA costs (recommended limit is 10%)	5%	6%	2%	**4%**

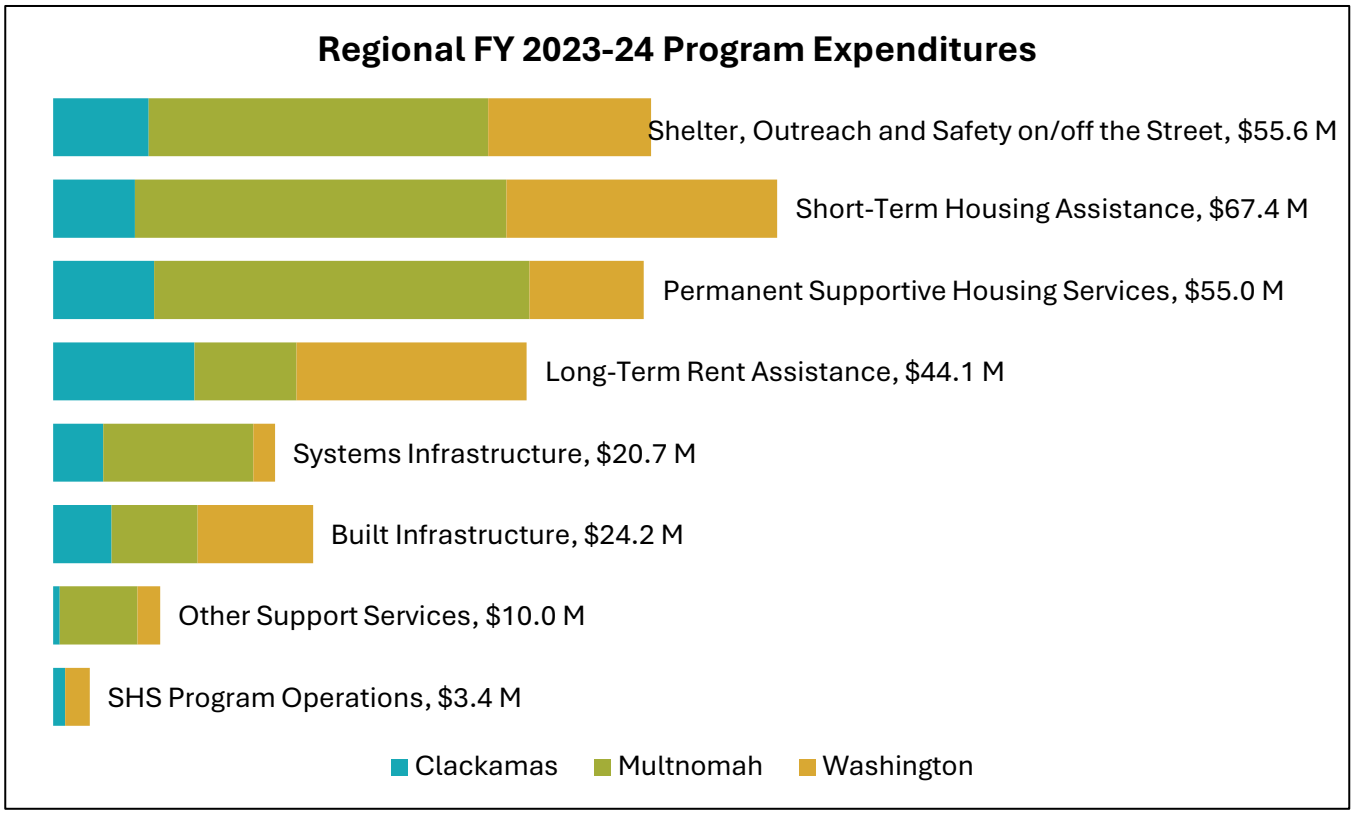
Combined, all regional administrative costs were 4.7% of total spending in FY 2023-24.

Regional Trends

Total program spending doubled between Years 2 and 3 of the program, and County partners spent 80% of their program budgets in FY 2023-24.



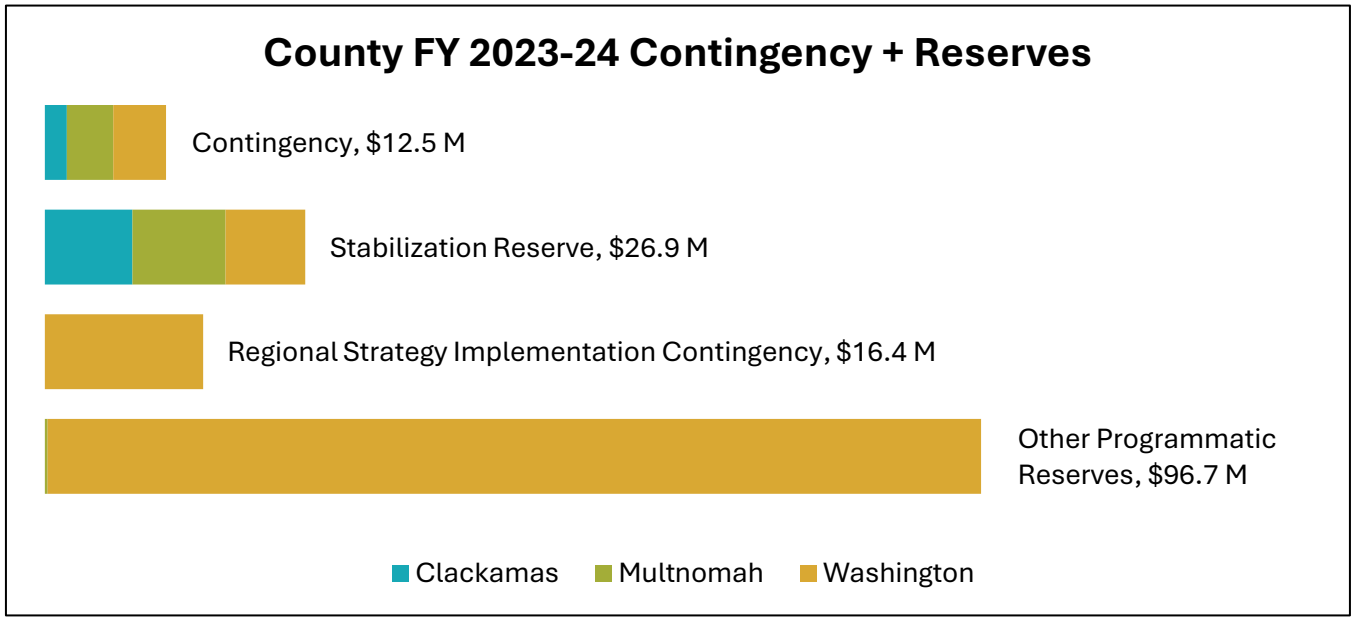
In Year 3, the largest program spending category was short-term housing assistance, representing just under a quarter of total expenditures. This was followed by shelter, outreach, and safety on/off the street and permanent supportive housing.



In addition to program and administrative costs, counties allocate resources to required and optional contingency and reserve accounts:

- Partners must dedicate a minimum of 10% of budgeted program funds in a given fiscal year to a **Stabilization Reserve** in the event that revenue falls below budgeted estimates (IGA 5.5.3). Metro has increased this recommendation to 15%.
- Partners may allocate a maximum of 5% of budgeted program funds to a **contingency account** to use in emergency situations or for unplanned SHS program expenditures that could negatively impact service delivery (IGA 5.5.4).
- Counties are required to allocate a minimum of 5% of their annual Program Funds to a **Regional Strategy Implementation Fund** (IGA 8.3.3), most of which has been allocated into reserves pending development of Regional Implementation Plans.
- Counties may allocate resources to other reserves, such as funding for the Regional Long-Term Rent Assistance or other programmatic reserves.

In FY 2023-24, counties allocated just under 30% of their total budgeted revenue into reserve and contingency accounts. Multnomah County allocated 7%, Clackamas County allocated 11%, and Washington County allocated 57% based on anticipated actual expenditures in Year 3.



The following pages summarize financial information by county, providing a consistent format to compare the similar but unique programs of each county.

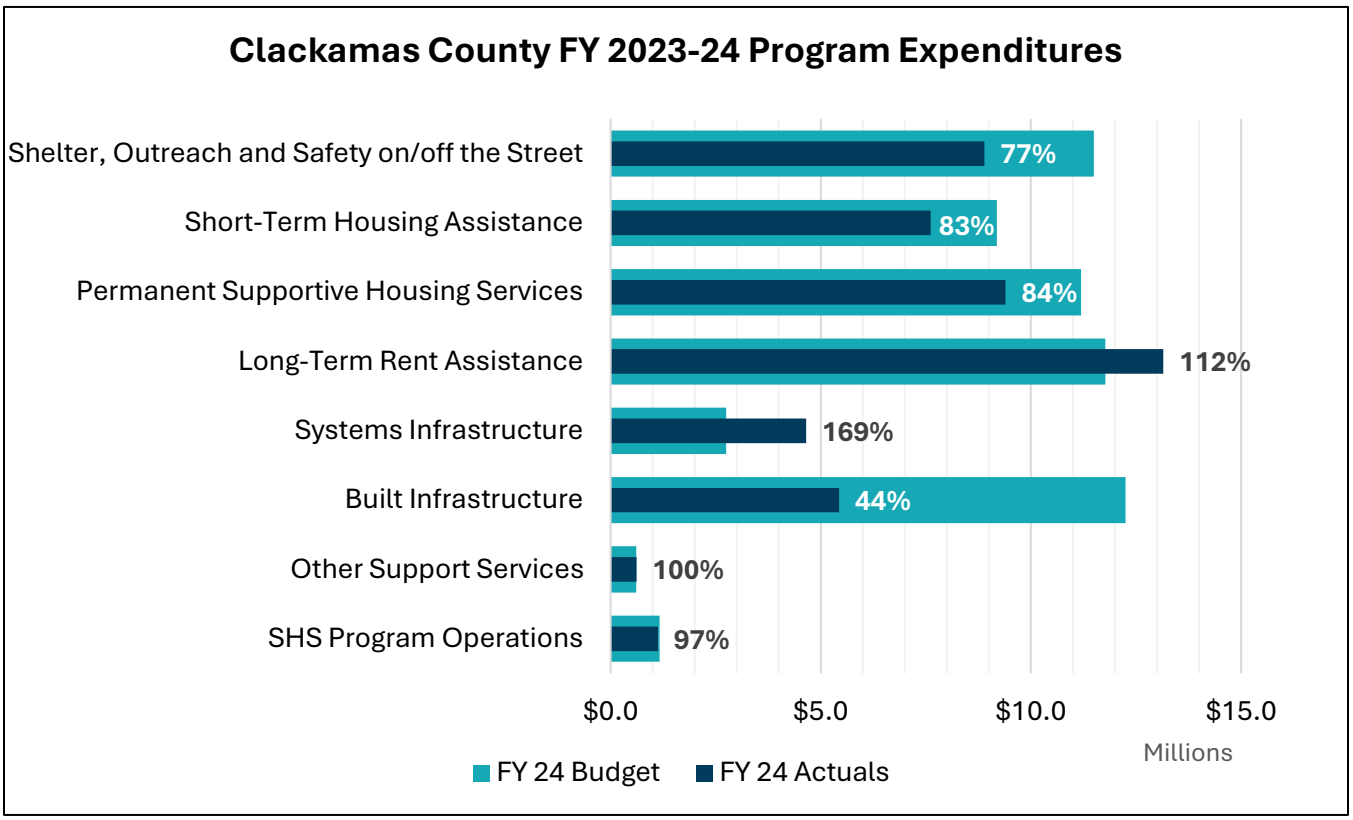
Note: SHS Program Revenue reported below is per the counties' financial reports. It will differ from the revenue reported above due to additional revenue, such as interest earnings, and differences in timing per each county's accounting policies. The FY 2023-24 annual reports submitted to Metro certified that there was no displacement of funds.

County Summary (in millions)				
	Clackamas County	**Multnomah County**	**Washington County**	**Total**
Prior Year Carryover	$92.7	$126.4	$115.5	$334.6
SHS Program Revenue	$66.1	$140.4	$103.3	$309.8
Other Revenue	$3.2	$4.7	$6.6	$14.5
Total Resources	**$162.0**	**$271.5**	**$225.4**	**$658.9**
Program Costs	$54.4	$143.5	$96.2	$294.1
Total Expense	**$54.4**	**$143.5**	**$96.2**	**$294.1**
Ending Balance (incl. Reserves)	**$107.6**	**$128.0**	**$129.2**	**$364.8**
% of Current Year Revenue Spent	**82%**	**102%**	**93%**	**95%**
% of Total Resources Spent	**34%**	**53%**	**43%**	**45%**

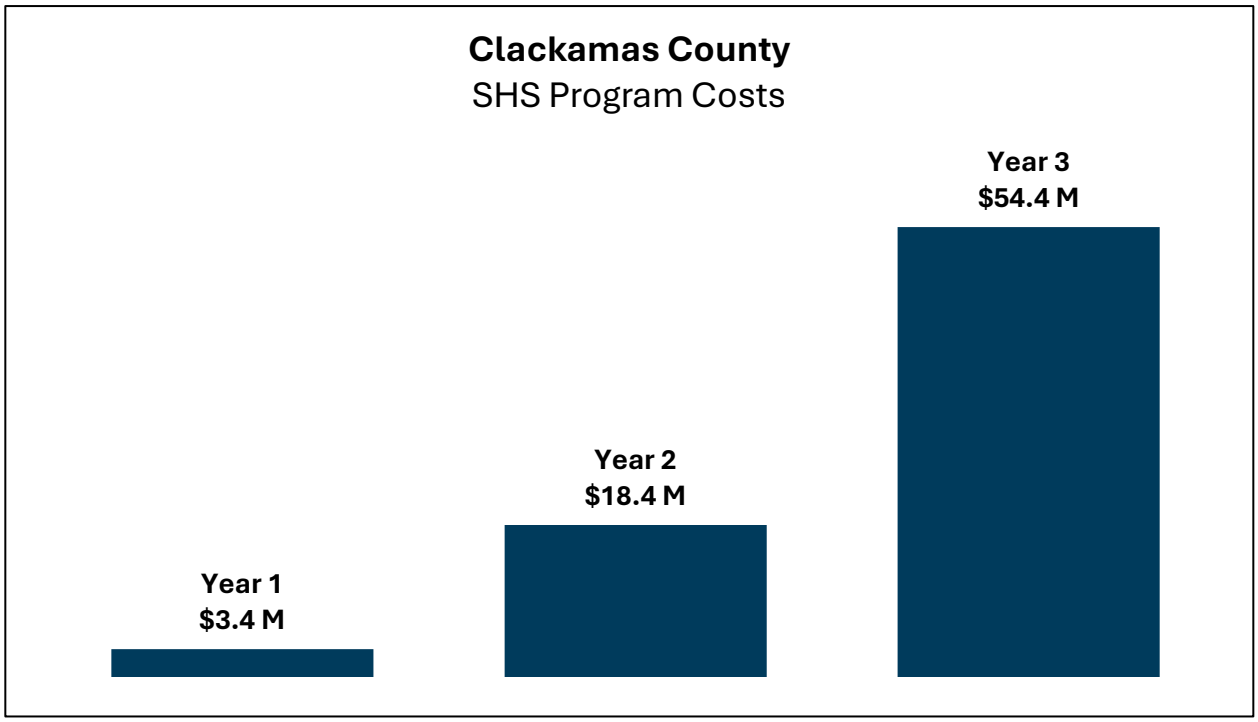
Clackamas County Snapshot

Clackamas County			
	Budget	**YTD Actuals**	**% of Budget**
Prior Year Carryover	58,623,269	92,701,597	158%
SHS Program Revenue	45,275,392	66,087,660	146%
Interest Earnings	100,000	3,203,230	3203%
Total Resources	**103,998,661**	**161,992,488**	**156%**
Program Costs	92,679,813	54,436,342	59%
Contingency	2,263,770	-	0%
Expense & Contingency	**94,943,583**	**54,436,342**	**57%**
Reserves	9,055,078	-	
Ending Balance (incl. Reserves)	**9,055,078**	**107,556,145**	

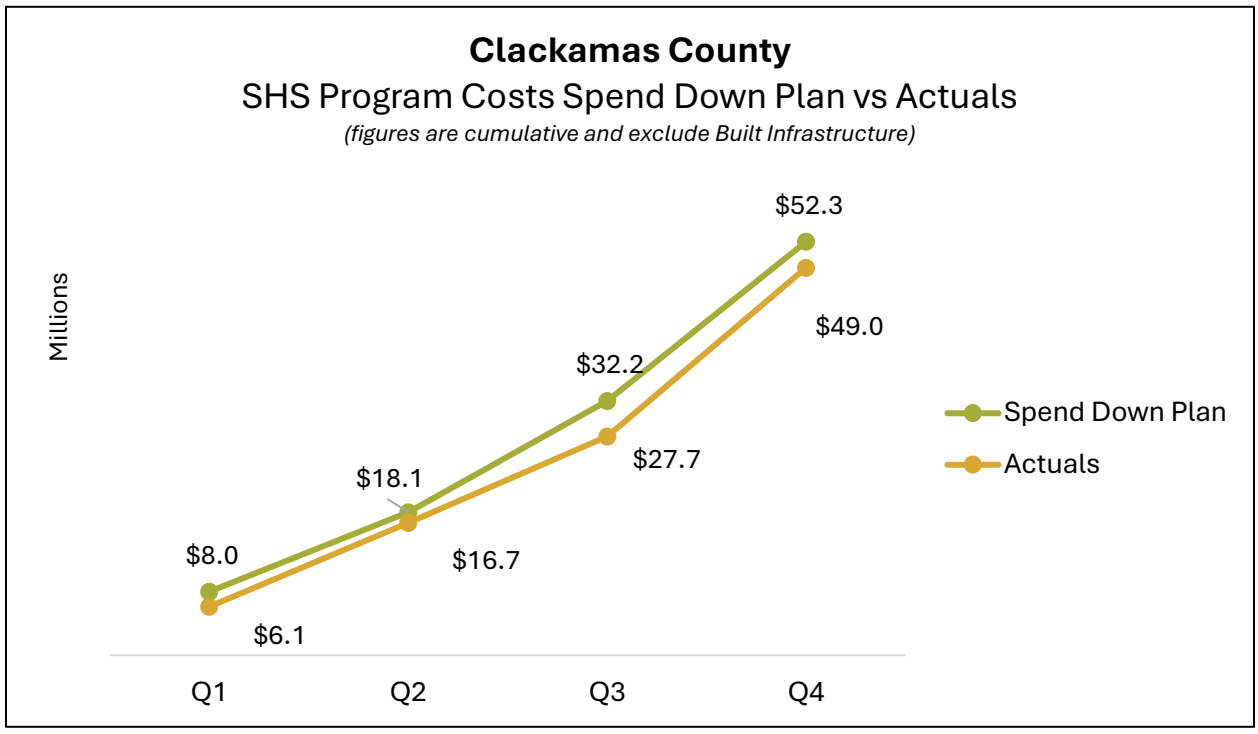
Clackamas County spent 59% of its program budget in FY 2023-24. The most significant source of underspending was in Built Infrastructure, where two key capital projects are now underway. Spending on Long-Term Rent Assistance was higher than expected as Clackamas County has made substantial progress toward its portion of the 10-year Permanent Supportive Housing goal.



Clackamas County has significantly increased its program spending each year, and notes that 100% of anticipated funding has now been committed. Clackamas County expects to see a decline in underspending and carryover as ongoing services and one-time investments fully ramp up over the next few years.



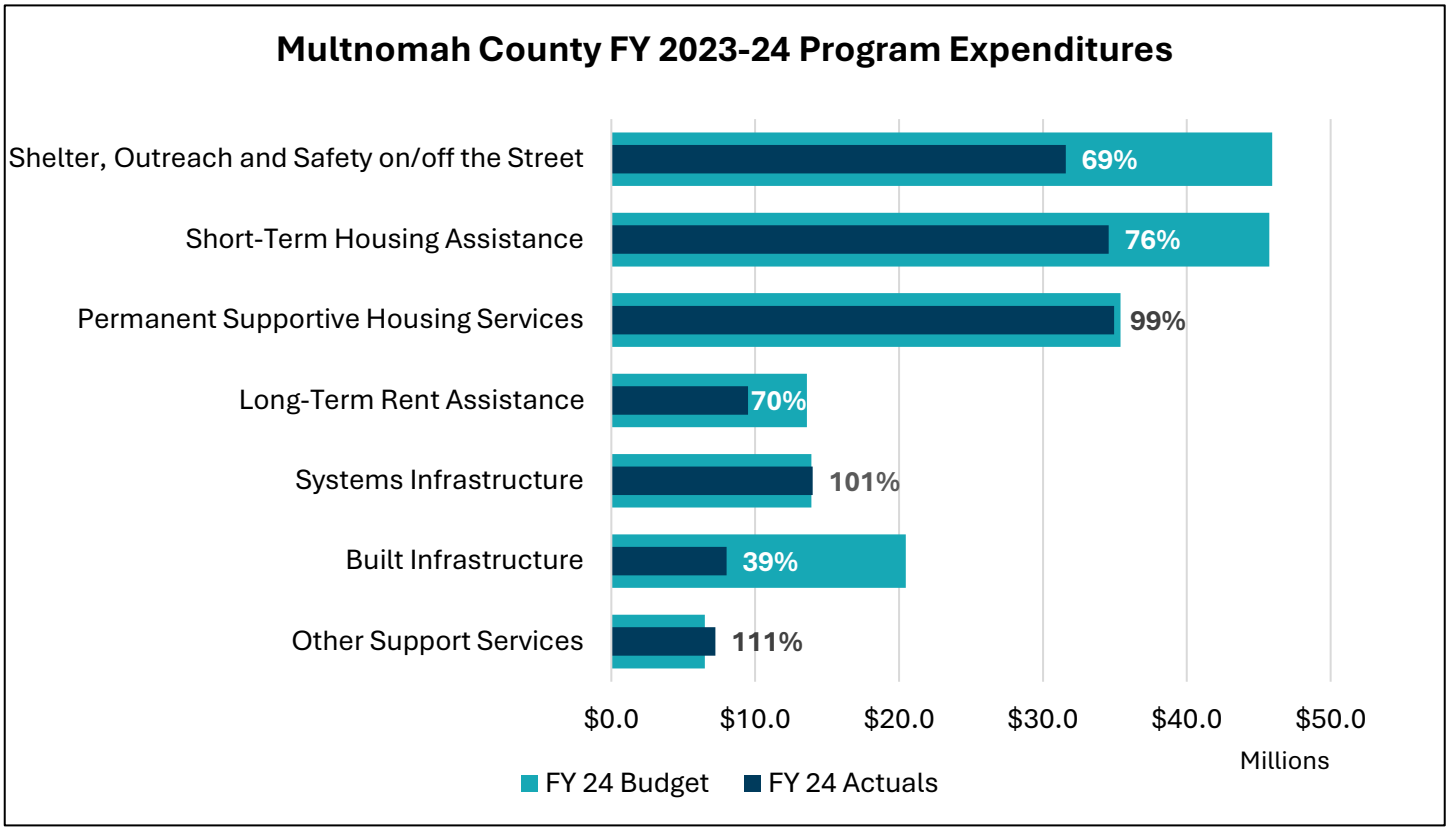
The chart below shows planned program expenditures versus actuals for Year 3.



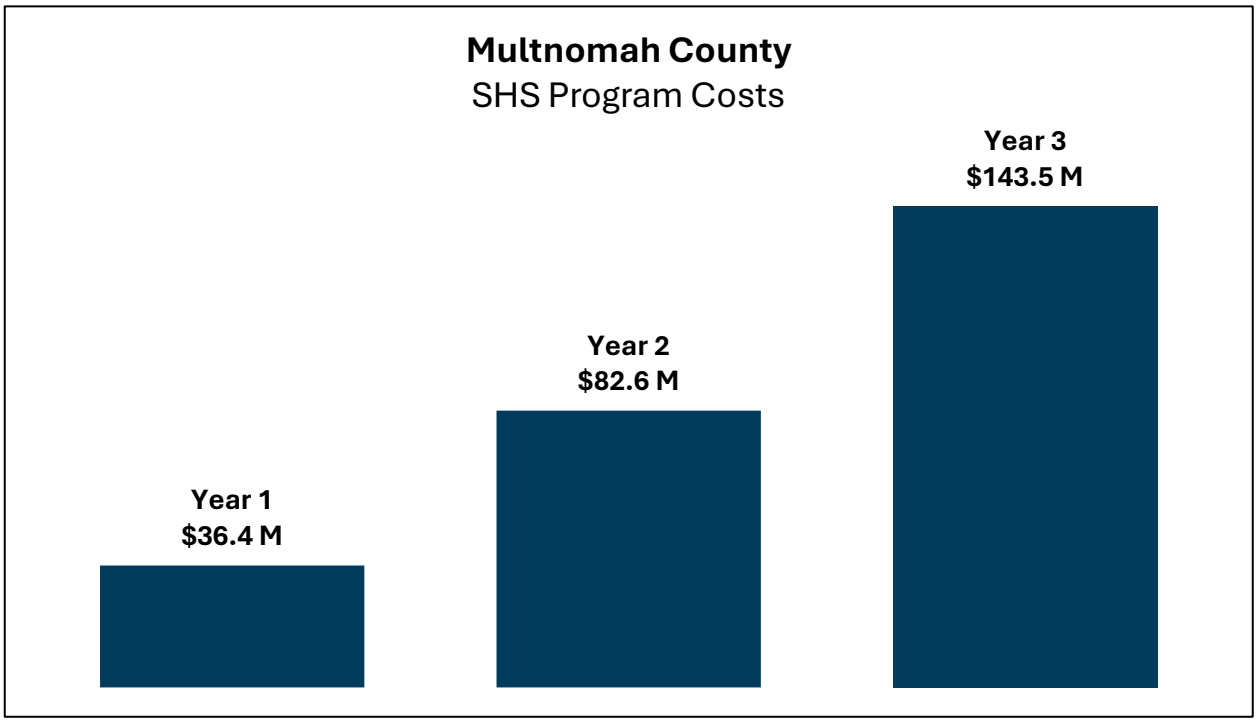
Multnomah County Snapshot

Multnomah County			
	Budget	**YTD Actuals**	**% of Budget**
Prior Year Carryover	108,677,054	126,381,795	116%
SHS Program Revenue	96,190,265	140,436,278	146%
Interest Earnings	-	4,500,442	
Misc	-	204,228	
Total Resources	**204,867,319**	**271,522,742**	**133%**
Program Costs	190,135,341	143,475,414	75%
Contingency	4,809,513		0%
Expense & Contingency	**194,944,854**	**143,475,414**	**74%**
Reserves	9,922,465	-	
Ending Balance (incl. Reserves)	**9,922,465**	**128,047,328**	

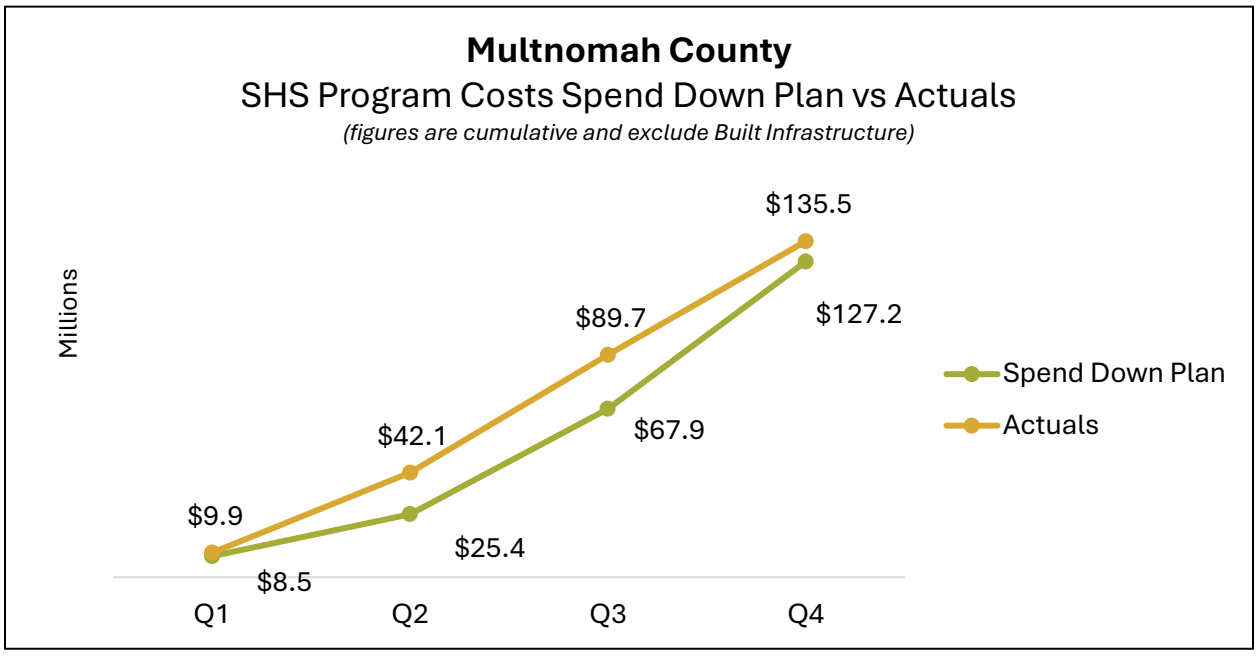
Multnomah County spent 75% of its program budget for FY 2023-24, including 99% of resources budgeted for Permanent Supportive Housing. Multnomah County plans to spend down their carryover in FY 2024-25 on one-time investments. SHS spending on shelter and eviction prevention (which are captured in the first two bars of the graph below) were lower than anticipated due to the availability of other resources to fund these programs; it is the County's policy to apply restricted resources first, and SHS dollars are most used by providers in the last two quarters of the fiscal year.



Multnomah County had the largest existing homeless services program prior to implementation of the Supportive Housing Services taxes. They continue to significantly ramp up spending and have allocated almost double for program expenditures in Year 4.



The chart below shows planned program expenditures versus actuals for Year 3.

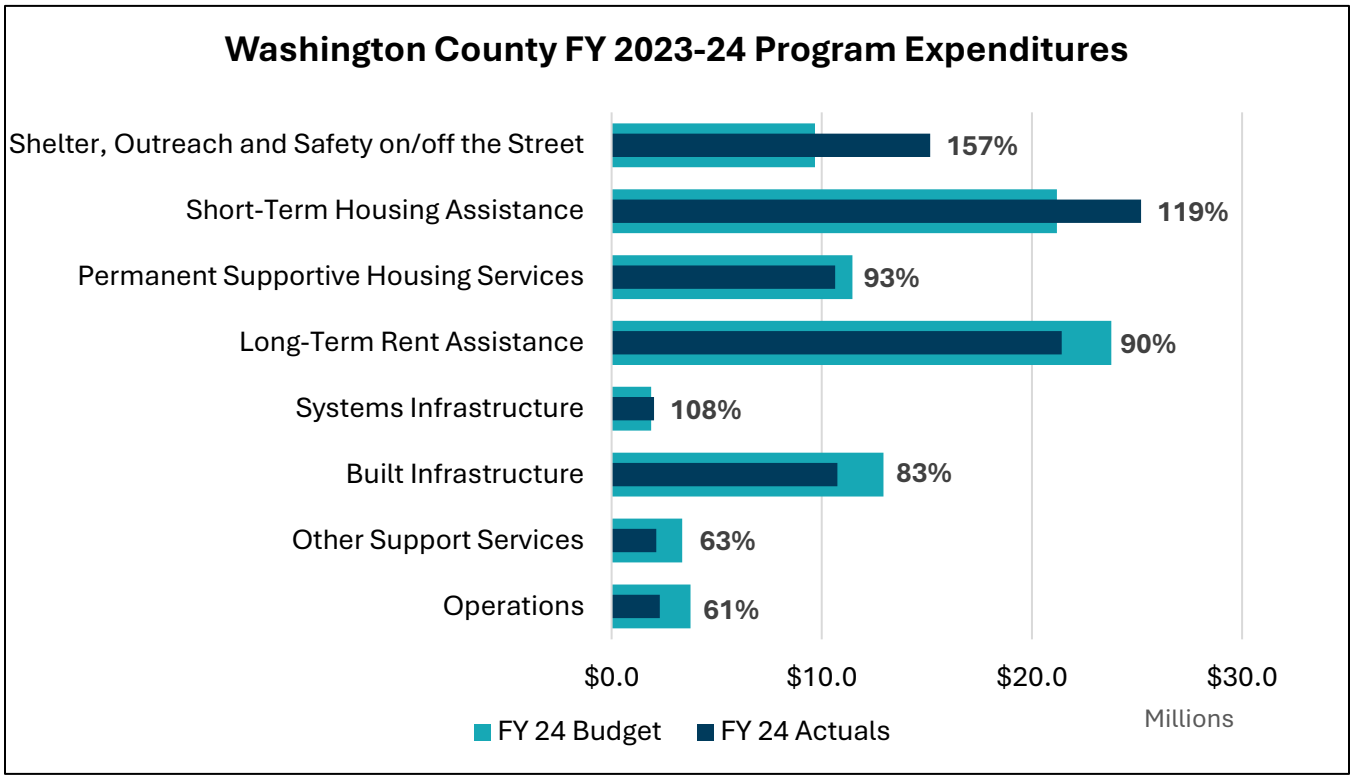


Washington County Snapshot

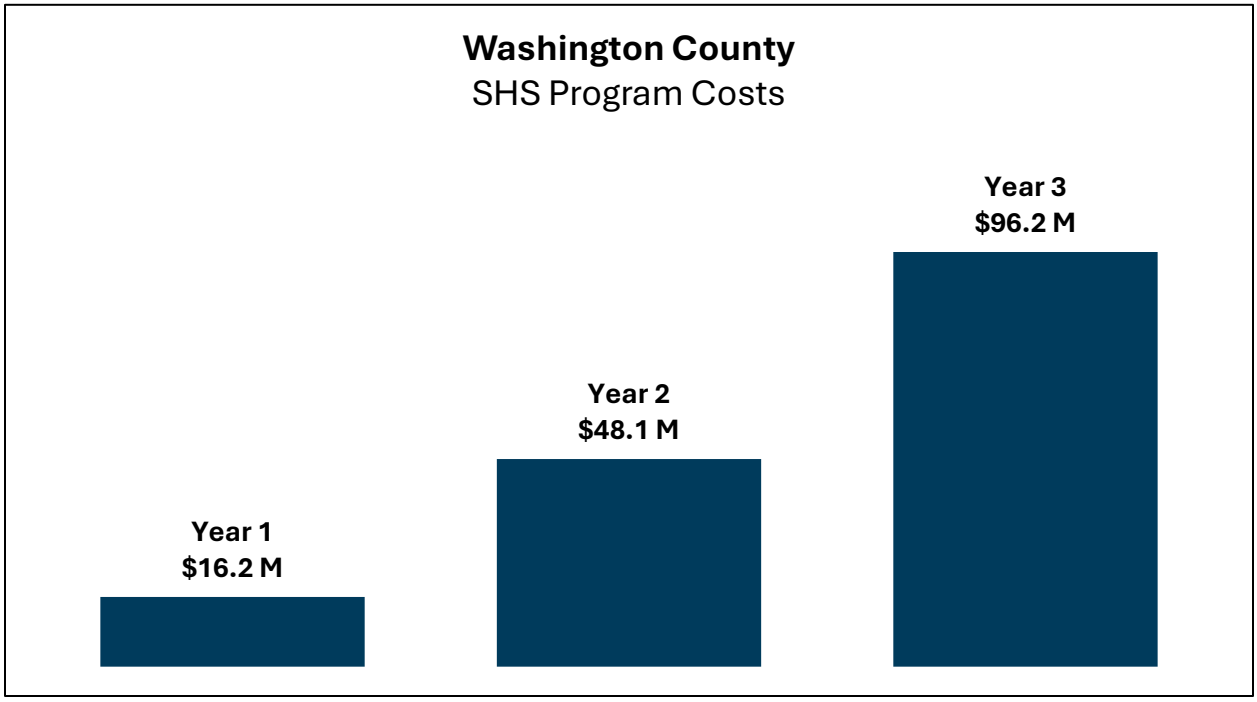
Washington County allocated a little over half of their FY 2023-24 budgeted revenue – which included both anticipated program revenue plus prior year carryover – to a reserve for spending in future fiscal years. Washington County allocated the other $96.2 million to program costs and spent nearly 100% of that budget.

Washington County			
	FY 24 Budget	**FY 24 Actuals**	**% of Budget**
Prior Year Carryover	111,634,198	115,473,580	103%
SHS Program Revenue	109,000,000	103,261,969	95%
Interest	2,000,000	3,108,676	155%
Other	-	3,508,625	
Total Resources	**222,634,198**	**225,352,850**	**101%**
Program Costs	96,171,723	96,150,076	100%
Contingency	5,450,000	-	0%
Expense & Contingency	**101,621,723**	**96,150,076**	**95%**
Reserves	121,012,475	-	
Ending Balance (incl. Reserves)	**121,012,475**	**129,202,773**	

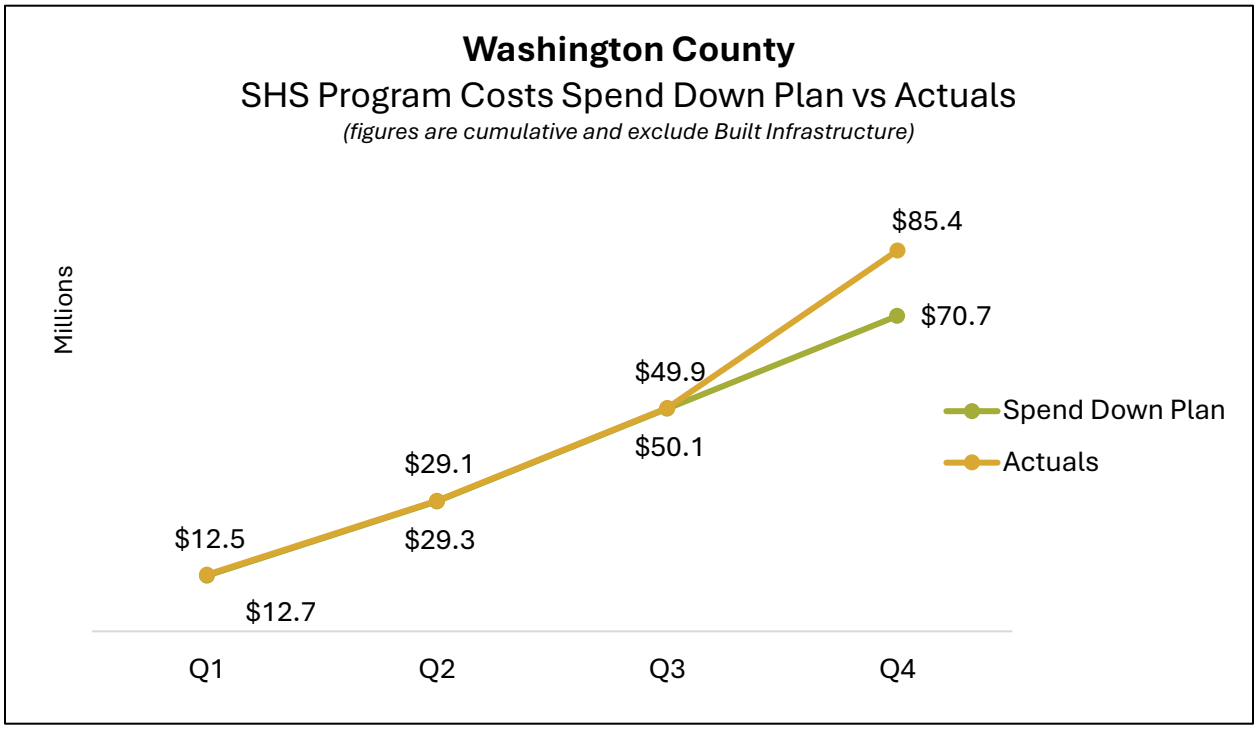
Washington County exceeded spending goals in many of the program categories. Some of this was due to actual costs being higher than anticipated when the original budget was set, specifically for shelter pods and rent payments for short-term housing assistance. Washington County has also increased SHS spending on eviction prevention with the expiration of COVID-era funding assistance.



Washington County doubled its spending between Year 2 and 3, but has signaled that they will be reducing planned expenditures in Year 4 based on the system growing faster than expected and revenue potentially lower than forecasted in Fall 2023.



The chart below shows planned program expenditures versus actuals for Year 3. Q4 spending reflects significantly higher costs for shelter operations and eviction prevention noted above.



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.

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503-797-1700

Healthcare Systems Alignment

Progress Update

Progress Update - Agenda

- Context – regional planning process
- Health Share updates
- County highlights
- Emerging regional strategies
- Next steps
- Questions/discussion

TCPB Goal

- Greater alignment and long-term partnerships with healthcare systems that meaningfully benefit people experiencing homelessness and the systems that serve them
  - TCPB Recommendation: Metro staff convene and coordinate with counties and key healthcare systems stakeholders to identify opportunities that integrate the Medicaid waiver with the Supportive Housing Services initiative.

SHC OC Recommendation

Expand access to health and behavioral health services: Continue work to identify and implement regional strategies that facilitate integration of health services, with a focus on behavioral health including mental health and recovery support services:

- Prioritize the needs of people of color and LGBTQ+ households in accessing health and behavioral health services
- Integrate health and behavioral health services into outreach, shelter, housing navigation, short-term housing and permanent housing, including strengthening crisis and long-term supports
- Continue to provide regional oversight and coordination to strengthen system-level integration and support county and program-level integration strategies
- Expand reporting on ongoing work to integrate health and behavioral health services in SHS programming at all levels (project-level, county-level and regional)

Health Share Updates

- Medicaid Waiver – Housing Related Social Needs (HRSN) benefit implementation
- High Acuity Behavioral Health initiative
- Regional Integration Continuum (RIC) concept
- Data sharing agreements
- Metro partnership – Housing Integration Team

Essential Elements of the Regional Integration Continuum (RIC) Model

- In this iteration of the RIC most of the case conferencing work continues as is, with little changes to current structure
- The main functions of the RIC would be:
  - Expanded data sharing agreements between county homeless services continuum and a central health care convener (Health Share)
  - Centralization of data, and metrics for sustainability of case conferencing
  - Health Share convening regional Health and Housing Integration table
  - Creation of partner MOU solidifying case conferencing work

Essential Elements of the Regional Integration Continuum (RIC) Model

What do we need from county housing department to be successful?

- County staff facilitating and convening case conferencing
- County staff participation in regional tables
- County leadership support of expanded data sharing

What do we need from health systems to be successful?

- Care coordination staff participation at case conferencing processes
- Health system leadership participation in regional tables
- Content knowledge from care coordination teams about the housing continuum of care

Clackamas County: health/housing integration highlights

- Health and Housing Integration team expansion
- Launched health/housing case conferencing
- HRSN technical assistance and service delivery
- Preparing to launch medical respite
- Community Connections contracts for specialized populations

Multnomah County: health/housing integration highlights

- Health and Housing Integration team expansion
- HRSN implementation
- HRAP health-related action items
- Case conferencing pilot launched in November
- Updated and expanded data-sharing agreement with Health Share

Washington County: health/housing integration highlights

- Low Acuity Transitional Support (LATS) medical respite program
- Health and Housing Integration team expansion
- HRSN implementation
- Healthcare Case Conferencing ongoing, with partners:

  - CareOregon, OHSU, Kaiser, Providence, Legacy/PacificSource, Virginia Garcia

Emerging strategies for regional plan

Strategy 1
Develop Regional Plan for Medically Enhanced Housing and Shelter Models

Strategy 2
Strengthen Regional Support for Cross-System Care Coordination

Strategy 3
Build Regional Cross-System Data Sharing Infrastructure

Next steps

Finalize regional plan and budget

TCPB March 12; SHS OC in April (tentative)

Launch the plan

Expand partner table

Ongoing iteration and updates

Questions?

METRO SUPPORTIVE HOUSING SERVICES TRI-COUNTY PLANNING BODY

Monthly progress report | January 2025

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

*Tri-County Planning Body regional goals**

Goal	*Progress*
Regional Landlord Recruitment	*Metro and county staff are continuing to coordinate on the implementation of strategies in the Regional Landlord Recruitment Regional Implementation Plan adopted by the TCPB, including meeting monthly in the Regional Landlord Recruitment Workgroup. As part of the Plan's Strategy #1: Communication and education plan, Metro have created a webpage on Metro's website with information on county landlord financial incentives. Metro will be working with a consultant on work related to Strategy #2: Align financial incentives and Strategy #5: Investigate needs for property management. TCPB will receive a progress report presentation on this goal area at January's TCPB meeting.*
Coordinated Entry	*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.*
Healthcare system alignment	*The regional planning workgroup (Health Share, counties, and Metro, with support from Homebase) is close to finalizing the implementation plan with a focus on regional opportunities to support, supplement, and advance existing health and housing system alignment initiatives. The implementation plan presentation has been rescheduled to come to TCPB in March 2025. The team will provide an*

	update to the SHS OC in January and present the plan for OC approval following approval by the TCPB. A healthcare/housing data integration workgroup continues to meet, learning from existing data sharing agreements (DSAs) across the region to discuss regional health/housing data sharing infrastructure and scope for the regional plan.
Training	*Metro and the counties continue to collaborate on the training goal. In early January, the Regional Capacity Team will be launching a pilot project to assess the effectiveness, value and regional scalability of the on-demand trainings available through National Alliance to End Homelessness and Corporation for Supportive Housing. In total, two staff at up to 10 agencies will take seven training courses and share their feedback to inform future implementation for Metro and the counties.* *The team is also continuing research into various pathways for centralized training or a certification for frontline housing and homeless service workers to inform potential implementation pathways. We plan to have a final version of that paper ready with our next TCPB presentation in April. We continue to gather provider feedback on this project, specifically the potential course descriptions, through a widely shared survey and one to one conversation, the results of which will be incorporated into the research paper and implementation strategies.*
Technical Assistance	*The Permanent Supportive Housing Technical Assistance Research and Demonstration project, which aims to learn best practices in PSH delivery from culturally specific providers and identify opportunities for regionalizing technical assistance, continues to move forward. RFP 4406, which will form the basis of technical assistance providers for this project closes next month and in January, the team plans to launch an LOI process to identify the providers who will participate with the intention of*

	having providers from all three counties, the majority of whom are culturally specific providers. Metro staff is also finalizing the grant process to support providers that participate with staff time and implementation of technical assistance strategies they identify with the consultant.
Employee Recruitment and Retention	*We are meeting monthly with a tri-county workgroup to draft a regional plan, reviewing concepts discussed in the June/July 2024 progress updates and exploring opportunities to develop regional approaches to contract policies, capacity building, and other areas, building on existing efforts in each county. The Regional Implementation Plan is currently scheduled to come to TCPB in May 2025.*

**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 Meeting Summary

Meeting:	Supportive Housing Services (SHS) Tri-County Planning Body Meeting
Date:	Wednesday, December 11, 2024
Time:	4:00 PM – 6:00 PM
Place:	Zoom Webinar
Purpose:	The Tri-County Planning Body (TCPB) will receive an update on Housing Funding Items.

Member attendees

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

Elected delegates

Washington County Chair Kathryn Harrington (she/her), Metro Council President Lynn Peterson (she/her)

Absent delegates

Clackamas County Chair Tootie Smith (she/her), Multnomah County Chair Jessica Vega Pederson (she/her)

County staff representatives

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

Metro

Michael Garcia (he/him), Patricia Rojas (she/her), Ruth Adkins (she/her), Abby Ahern (she/her), Craig Beebe (he/him), Brian Kennedy (he/him), Holly Calhoun (she/her), Valeria McWilliams (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.

Welcome and Introductions

Co-chairs Mercedes Elizalde and Steve Rudman provided opening remarks.

Tri-County Planning Body Meeting Summary

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

The TCPB approved the November Meeting Summary.

Public Comment

No public comment was received.

Conflict of Interest

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

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.

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.

Yvette Hernandez noted that she works for Home Forward which receives SHS funding, but she participates in the TCPB as a community member.

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

Monta Knudson declared a conflict of interest as JOIN receives SHS funding.

Mindy Stadtlander declared a conflict of interest as Health Share of Oregon has worked closely with Metro on housing and homelessness systems alignment.

Staff Updates

Valeria McWilliams, Metro, stated that Metro staff will be sending out a survey to either add a second meeting or extend the meeting time for the January TCPB meeting.

Nicole Stingh, Washington County, shared that two awards have been given to traditional housing projects. She noted the awards were contingent on Metro's housing funding discussion.

Breanna Flores, Multnomah County, shared that the county held its third provider conference with 250 registrants and that the Beacon Landing project opened.

Housing Fund Update

For details and graphics, please review the archived meeting packet pages 9-27.

Metro Council President Lynn Peterson appreciated TCPB members' work advancing regionalism. She reflected on frustrations she has heard regarding lack of accountability, inability to make decisions, and incorporating regional standards. She noted that the SHS measure needs to work better to have the impact it was intended to, that Metro does not want to lose the progress that has been made, and to keep investing in affordable housing and services.

Tri-County Planning Body Meeting Summary

President Peterson provided a brief overview of Metro's housing funding discussion to date, encouraged TCPB members to read Council work session summaries, and stated that the Council established Resolution No. 24-5436 in November. She reflected on concerns the Council heard from the TCPB co-chair memo and shared the Council's commitment to continue funding TCPB's regional work and to include current programs in the regional action plan. She noted that details will need to be worked out in the transition program.

Holly Calhoun, Metro, shared that stability, predictability, and accountability were the three key themes from Resolution No. 24-5436. She provided an overview of the eight principles for a regional program, emphasizing the commitment to serve Populations A and B, to make homelessness rare, brief, and nonrecurring, and to have greater accountability.

Holly reviewed the key viewpoints and concerns listed in the TCPB memo, and how Resolution 24-5236 addresses those items. She emphasized that work will not start over and detailed how the Resolution allows for more accountable governance. She reviewed the proposed action plan elements and noted key areas of TCPB concern to continue addressing.

Brian Kennedy, Metro, reviewed the proposed allocation scenarios that Metro Council has been discussing. He reminded the Committee that the tax is volatile, and the goal is to size the ongoing services and rent assistance to counties in a way to have reasonable certainty, and to have the remaining funds go to other items. The primary allocation goes to SHS services and rent assistance, the secondary allocation goes to affordable housing, the third allocation goes to city programs, and the final allocation goes to one-time services and grants.

Brian reviewed a series of bar charts illustrating scenarios that model potential future allocations. He noted that the bar charts are not forecasts, but scenarios that model historical patterns of volatility. Scenario 0 is the current law. Scenarios 1 and 2 include assumptions for a tax sunset extension to 2050, tax indexing beginning in 2026, and inflation at 3%.

Holly shared that the next steps include engaging with partners, exploring the viability of a potential ballot measure, and preparing an ordinance for consideration at the December 19 Council work session. She asked the Committee how a transition can best advance TCPB regional strategies and what recommendations TCPB members have for a transition.

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

- **Comment, Co-chair Elizalde:** The 3% inflation rate assumption is a flat or low assumption, which encourages wage suppression or a decrease in services.
- **Comment, Sahaan:** I agree with Co-chair Elizalde. Scenario 2 is a nonstarter. I would look at not decreasing the base allocation the SHS measure was intended for, otherwise wage suppression or limited services will occur. Scenario 1-3-year transition is the best option. This conversation started with the understanding that it is not viable to extend the 2018 Housing Bond and the need for housing development. This is okay, but the initial purpose of the measure needs to be protected. We cannot prioritize everything; if we do this, we will do everything poorly rather than do some things well. We should prioritize the things we need to do well and have those be a success so the region can pass other measures. Voters want to see success.
- **Comment, Co-chair Rudman:** It takes a long time to change voters' hearts and minds, and to see change. I have been Co-chair of the Affordable Housing Bond for the past six years, and that Bond has been a success. I think we should wait and do another housing bond. I think the measure change should make affordable housing an allowable use, but not mandate it. Why does Metro need to add the City Program? Require the counties to work with cities and increase the current efficiency and effectiveness of the current measure. If

the regional investment fund (RIF) goes away, we lose the dedicated allocation for regionalization.

- **Comment, Yoni:** Regionalization is important, including a regional system of care. The counties are working hard and deserve credit. This shouldn't be about power or control, but how to form processes for the best collaboration for outcomes.
- **Comment, Cristina:** When looking at values, it would be helpful to see actual amounts spent, so voters can see how much has been spent on what, and this will also help with planning. We should not be decreasing services. I want to see how else funds can be used like wrap-around services. The voters will appreciate seeing how the funds flow to help people get out of homelessness and the services that are needed to support that. The projections out to 2050 are not useful to voters, people care about what is happening now, and 3–5-year projections are more realistic of voter interests.
- **Comment, Eboni Brown:** The cost of rent is rapidly increasing. How does that factor into these scenarios and what mitigation factors will be implemented with the new measure? As rent rises, so does the cost of keeping people housed.
    - **Metro Response, Brian:** Government expenses rise faster than the rate of inflation, but for budgeting exercises, governments use the rate of inflation from the Bureau of Labor Statistics.
    - **Metro response, Holly:** The sunset extension is trying to solve that.
- **Comment, Co-chair Elizalde:** This work is largely subcontracted, and a majority of the funds are used to pay rent, which has a 10% increase cap. Subcontractor and rent costs are not rising 3% a year. This is a community program, not a government program, and budgeting should reflect that.
- **Comment, Mindy:** From a Medicaid lens, there are gaps in health and housing services that providers try to blend together as it is the right thing to do, but there are no explicit policies. For the next steps, I would think about creating flexibility to provide a single set of services and explicitly connect those to Medicaid and other state funding services for the long term.
- **Question, Washington County Chair Kathryn Harrington:** Which bucket of funds will be dedicated to regionalism? Metro is trying to look at collective revenue to increase affordable housing. They have been asked by the Portland Metro Chamber to reduce the tax rate and have heard perspectives from cities asking for more funds to deliver food pantry support and other services. The measure was clear and specific that these services are for Population A and B. Metro is doing a good job.
    - **Metro response, Brian:** Most of the regional coordination work would fall to Metro and be covered in the 5% administration allocation. Services would be delivered at the county level with identified investments from the Housing and Homelessness Policy Advisory Committee (HHPAC) through the other allocation buckets.
    - **Metro response, Holly**: These are the exact concerns and critiques that the Council is working through.
- **Comment, Cameran:** This is a marketing problem. Voters see individuals on the street experiencing crisis, they do not see successes that have been achieved. We need to reframe things for the voters to have them fully understand that we have been successful. It takes a continuum of care to keep houselessness brief, nonrecurring, and rare. A majority of the population wants affordable housing and to keep Population A and B housed. This starts with wrap-around care. We should focus on and excel at keeping people housed by providing more wrap-around services. Those who are fatigued by paying taxes, still have funds to pay those taxes. If we respond to those who have the wealth to pay taxes, we are not responding to the people we should be responding to: Population A and B.

- **Comment, Sahaan:** Governance is the biggest priority for any adjustment. What we are seeing right now are funds not being spent well. I do not think there is voter fatigue to support houselessness, there is fatigue for poor performance. Governance needs to be addressed so we can do better. Each county prioritizes the unique needs of its jurisdiction. There needs to be some level of regionalization and regional vision because we are currently prioritizing too much. The counties need to prioritize the same few things and succeed at those with excellence. The governing body needs to have a collective vision. The current inefficiencies we are seeing total an amount that is greater than the tax cut.
- **Comment, Eboni:** Are there any scenarios that account for if federal services are decreased and removed? Providers are anticipating federal service cuts, and we are currently struggling with food security at the state level. What are the impacts on medical programs? How are vacancy rates being leveraged? I am seeing in the scenarios that there is an assumption there will be a significant loss no matter what.
- **Co-chair Elizalde:** Any programs or projects that have been using the RIF would now need to come from another allocation, which is problematic. Regional priorities and innovation the RIF was set aside for will now need to compete with services. I would like to see how the counties will do this. Can the counties complete an exercise that would show how the landlord mitigation fund would be impacted by the base allocations and share any questions and consequences that arise from that? Can the counties complete an exercise that would show how a tri-county purchase with Community Warehouse would play out? I do not want to approve more implementation plans until these questions are answered because I do not want the counties to commit to something that would then need to be cut.
    - **Metro response, Brian:** The charts are not forecasts, they model the state's historical experience with volatility. Metro just released its updated five-year forecast for SHS and we are experiencing real-time fluctuations and the concerns for managing services exist today. We are looking at a system that prioritizes stability for certain assets.
    - **Washington County Response, Nicole**: The delta for Washington County forecasts are $16 million.
- **Comment, Co-chair Rudman:** It sounds like Metro administration funding would be how regional priorities would be funded. If that is true, Metro should be explicit about the amount of funds and what that process would look like. These funds are meant to be flexible and to fill in gaps.
- **Question, Monta:** This is not a time for a reduction in revenue and the tax rate. A reduction in revenue is a reduction in services. Have we looked at what impacts are for the current level of services? If you lower the tax rate, providers are asked to do more with less. We may see the largest direct service worker walkouts we have ever seen. They do not have living wages and the expectation is that they will do more with less. I support the governance changes and restructuring, but it is a poor choice to reduce revenue.
    - **Metro response, Patricia Rojas:** This is exactly the kind of conversation we need to have for SHS. We have been waiting for this long-term funding source opportunity to make homelessness rare, brief, and non-recurring. SHS has always been intended to braid funding sources and to be used as a catalyst to take solutions to a systems level. Without this change, programs would have to start ramping down in 2027 and that is not the right route. There are details to work out but the Council does not want to see this regional work stop.
- **Question, Cameran**: I would like to hear more about the landlord risk mitigation program (RMP) and associated implementation plan. There is a lot to be done to ensure people are

aware of the RMP. I also want to see implementation plans sooner so we can see how to keep the RIF alive to meet and fund regional goals.
    - **Metro response, Valeria**: We will reshare the work plan to approve the remaining plans through May.
- **Comment, Sahaan McKelvey:** We want to keep the RIF fund for all the reasons that have been outlined in this discussion. A bond extension will get passed when it is time. No one is going to vote to eliminate 10,000 Regional Long-term Rent Assistance vouchers. We need to focus on braided funding opportunities. Some foundations will fund coalition work, and we can leverage funding if we are a collective that this measure intended. I encourage us to fail forward and have a collective regional vision and long-term system thinking.

Closing and Next Steps

Ben thanked everyone for participating and shared that the next steps are:

- TCPB members to respond to the January meeting planning survey.
- Co-chairs and jurisdictional leadership team to meet to discuss scenario exercises and expectations.
- Metro staff to reshare TCPB work plan.
- Next meeting: January 8, 2025

Adjourn

Adjourned at 6:05 p.m.

The following materials were received during the meeting

To: SHS Regional Oversight Committee
From: Outside In, 1132 SW 13th Ave, Portland, OR 97205
Date: Monday, February 10th, 2025

Outside In has been at the forefront of addressing homelessness and health inequities in the Portland Metro Area for over 56 years. This work depends on crucial funding from the Supportive Housing Services (SHS) tax, which provides critical programs for some of the most vulnerable members of our community.

In 2024 alone, our Youth Department served 1,216 youth experiencing homelessness. These young people sought safety, support, and the opportunity to build better futures, and we were there to meet them. With the looming threat of federal social service budget cuts proposed by our new administration, a reduction in SHS funding would be devastating. It would compromise these essential services and leave many without the resources they need to survive and build independent lives.

Housing is a human right. Reducing the marginal tax rate would eliminate $17.5 million annually—funding that could support rent, move-in costs, and case management for 500 households in Multnomah County for an entire year. This decision would prioritize very minimal savings for high-income households over life-saving investments for our most vulnerable community members. A household earning $250,000 would save just $4 a month from this rate cut—an amount that pales in comparison to the devastating impact of a $17.5 million loss in regional funding.

We urge Metro Council to prioritize the needs of our unhoused and housing-insecure neighbors. Maintain the 1% marginal tax rate, extend or eliminate the sunset provision, and continue investing in long-term housing solutions. Change takes time. Cutting resources now would undermine years of progress and put those experiencing housing instability in our community at greater risk for adverse health conditions, preventable death, and needless suffering.

At Outside In, we believe that everyone deserves the opportunity to thrive, and with your support, we can continue making that belief a reality. Thank you.

09:36:42 From Chair Kathryn Harrington to Everyone:

Has the committee not been informed that the Data Sharing agreement is done/agreed to?

09:37:58 From Mike Savara to Everyone:

Hi Chair! I should have been more clear - I know we haven't gotten a formal update on that progress, but I hear good things about the current status! my apologies for being unclear there.

09:54:11 From Liam Frost to Hosts and panelists:

Hear, hear.

09:54:20 From Liam Frost to Everyone:

Folks — just a quick additional note on my earlier update on Metro Council President's workgroup. The workgroup is a temporary workgroup and is intended to disband this summer once their work has concluded.

09:55:05 From Chair Kathryn Harrington to Everyone:

The Metro President letter of invitation for the workgroup is a public document that can be shared with this committee.

10:03:00 From Felicita Monteblanco, NWHF, she/her to Everyone:

thank you kris!

10:21:42 From Mike Savara to Everyone:

Yes!! Agreed - Kris - you are so great at digging into our thoughts and accurately portraying them here!

10:26:01 From Mike Savara to Everyone:

Appreciate Carter's edits - thanks!

10:32:27 From Mike Savara to Everyone:

let's focus on the outcomes we want to see, not necessarily the means that staff will use to get there.

10:37:40 From Dan Fowler to Everyone:

Agree, We can put a statement in the cover letter to issues that have been completed.

10:45:11 From Mike Savara to Everyone:

nice work, team!! Thank you Kris!! :)

10:46:31 From Chair Kathryn Harrington to Everyone:

Recording needs to be turned on again since Metro staff is reporting out.

10:46:41 From Felicita Monteblanco, NWHF, she/her to Everyone:

thank you co-chairs!!!

10:46:54 From Mike Savara to Everyone:

:)

10:47:23 From Metro Housing Department to Everyone:

Apologies for the stopped recording. Ran out of storage space

10:49:43 From Josh Mahar to Everyone:

Reconvene at 11:10am

10:52:42 From Carter MacNichol to Hosts and panelists:

Thank you co chairs for getting us through this. And a special thanks for tolerating my late entry comments. I have to drop off for the rest meeting. See you next month.

10:58:52 From Metro Housing Department to Everyone:

Resharing a message from Carter so it is accessible to everyone: Thank you co chairs for getting us through this. And a special thanks for tolerating my late entry comments. I have to drop off for the rest meeting. See you next month.

11:15:41 From Dan Fowler to Everyone:

I have an annual board meeting at noon. I will need to drop offf ay 11:50.

11:42:40 From Mike Savara to Everyone:

love that, so glad HSO is taking that important role of analyzing results on!

11:43:50 From Mike Savara to Everyone:

yes!! like, do they leave the meetings feeling like they have a colleague they know they can call from the "other" system? love that qualitative piece, Lori!

11:51:12 From Ruth Adkins, Metro (she/her) to Everyone:

And the data capacity at Health Share will help with building toward this goal

11:51:51 From Mandrill Taylor to Everyone:

Strong work. Thank you.

11:52:47 From Adam Peterson (he/him) - Health Share of Oregon to Hosts and panelists:

Thank you for having us!

11:52:48 From Mike Savara to Everyone:

thank you all!

11:52:49 From Acacia McGuire Anderson she/her (Clackamas Count.) to Hosts and panelists:

thanks everyone!

11:52:56 From Leslie Gong (She/Her) to Hosts and panelists:

Thank you!

11:53:04 From Ruth Adkins, Metro (she/her) to Everyone:

Thanks so much all - and for the excellent questions and comments

11:54:24 From Felicita Monteblanco, NWHF, she/her to Everyone:

can't attend March 24, sorry.