



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: March 13th, 2024
Time: 4:00pm-6:00pm
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive an update regarding Multnomah County's HMIS work and review the Landlord Recruitment and Retention Implementation Plan.

4:00pm **Welcome and Introductions**

- Decision: meeting summary approval

4:15pm **Public Comment**

4:20pm **HMIS Strategic Sourcing Analysis Update – Multnomah County**

5:05pm **Regional Landlord Recruitment and Retention Implementation Plan**

- Decision: implementation plan approval

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

- Next meeting: April 10th, 2024

6:00pm **Adjourn**

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Tri-County Planning Body Meeting Summary

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: Wednesday, February 14, 2024
Time: 4:00 PM – 6:00 PM
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive a presentation on the Supportive Housing Services Audit, discuss the Regional Landlord Recruitment and Retention goal and learn about the HMIS Strategic Sourcing Analysis report.

Member attendees

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

Absent members

Mercedes Elizalde (she/her), Mindy Stadtlander (she/her)

Elected delegates

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

Absent delegates

Clackamas County Chair Tootie Smith (she/her)

County staff representatives

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

Metro

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

Kearns & West Facilitators

Madeline Kane (she/her), Ariella Dahlin (she/her)

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

Welcome and Introductions

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

Jes Larson, Washington County, shared that Washington County made national news regarding data coordination services.

Kanoe Egleston, Multnomah County, shared three Permanent Supportive Housing (PSH) projects that came online in Quarter 2.

Patricia Rojas, Metro, welcomed two new Metro staff, Cole Merkel and Hunter Belgard.

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Cole Merkel, Metro, introduced himself as the Housing Regional Capacity Manager.

Hunter Belgard, Metro, introduced himself as the Regional Data Lead.

Multnomah County Chair Jessica Vega Pederson shared that she went to Washington D.C. and met with the United States Interagency Council on Homelessness (USICH) which was a great chance to talk about work underway in the region. She added that they are available to be a resource and a partner in the work.

Madeline Kane, Kearns & West, reviewed the meeting agenda and objectives.

The TCPB approved the January Meeting Summary.

Public Comment

Andrew McGough provided written and verbal public comment.

Supportive Housing Services Audit

Brian Edmonds, Metro Auditor, introduced himself and stated that the purpose of the audit was to follow up on the 2021 audit recommendations and determine any gaps or overlaps in government operations. He provided background information on the tax measure and shared that the result of the audit was that Metro had fully implemented one recommendation from 2021, and the other two recommendations were in process. He stated the audit identified areas of oversight duplication and variation in data definitions and calculations.

Paoa Wandke, Metro Auditing Team, introduced himself and detailed recommendations relevant to the Metro Housing Department, SHS Oversight Committee, and the Tri-County Planning Body. He stated that oversight roles should be clarified, Metro Council should receive more updates, intergovernmental agreements should be reevaluated regularly, the SHS Oversight Committee should refine its focus on administration, and that there should be consistent data methodologies and definitions between counties.

David Beller, Metro Auditing Team, introduced himself and detailed data inconsistencies and reliability concerns, noting that the differences were as high as 53%. He stated that the inconsistent data was reconciled by the year's end, indicating there are methods to have consistent data. He emphasized the need for stronger quality control processes as the counties appear to be using different methodologies and assumptions, especially relating to Population A and Population B. He stated that the inclusion of non-SHS-funded services under services provided could be misleading and that long-term planning is required to successfully meet program goals as some people will need SHS for the rest of their lives.

Brian Edmonds, Metro Auditor, concluded by summarizing there are 18 total recommendations from the audit, 7 to ensure program oversight, six to improve data and reporting consistency, and 5 to identify programs to inform long-term planning.

Patricia Rojas, Metro, thanked the auditing team and stated that TCPB members received in their email the response from Metro's Management Team that addressed each of the recommendations and themes. She shared that Metro largely agrees with the auditor and it will take some time to meet some of the areas.

Monta Knudson asked if the definitions of "imminent risk" of experiencing homelessness for Population A and "substantial risk" of experiencing homelessness for Population B were too close as folks can move between those definitions easily.

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Brian Edmonds, Metro, responded that having definitions that are clear and consistent is helpful and the intent is to have set standards so there is a clear deciding line between Population A and B. He noted he has heard feedback that clients move between the two.

Steve Rudman thanked the auditing team for their work, reflected that SHS is a complex program, and emphasized the need for systems integration and alignment to service populations. He shared the need to be clear on where dollars are going to ensure programs are working.

Regional Landlord Recruitment and Retention Goal

Madeline Kane, Kearns & West, reflected on the process the TCPB took from developing goal language to December's prioritization exercise and deciding to move 12 areas forward for the counties.

Nicole Stingh, Washington County, provided an overview of what work county staff have done since December. She shared that county staff and landlord liaisons from the three counties reviewed the Focus Strategy memo as well as all the information and discussion the TCPB had surrounding the Landlord Recruitment and Retention Goal. She shared that after meeting with the landlord liaisons, county departmental leadership identified five proposals to prioritize. She highlighted there are multiple activities under the 5 proposals, incorporating some pieces of the 12 areas. She noted that the recommendation memo that the counties and Metro developed is what can be done in the near term.

Vahid Brown, Clackamas County, shared that there are three broad areas of regionalization: policy, programmatic, and administrative consolidation. He detailed that each proposal identified what type of regionalism it embodies and what it would achieve. He detailed the first two proposals: communication and education plan and align financial incentives. He stated that the communication and education plan would develop communication and education materials and a recruitment strategy, support a marketing plan to landlords, and support and expand landlord liaison work within the counties. He noted that the aligning financial incentives proposal would overlap with the training and technical assistance goals by implementing a training series, be integrated with the communication and education plan, and expand incentive feasibility.

Breanna Flores, Multnomah County, detailed the third proposal of tracking and access to unit inventory. She shared that a pilot program with Housing Connector would study the impacts of a unit-tracking platform at the regional level. She noted that Multnomah County has a partnership with Housing Connector and they currently have 58 units on the platform.

Vahid Brown, Clackamas County, shared that the fourth proposal of quality problem-solving services includes a landlord support line and integrates best practices in provider training. He shared that Clackamas County would pilot a landlord and property management support line to support tenant issues that may arise.

Nicole Stingh, Washington County, shared that the fifth proposal would be led by Metro to investigate property management leads. She stated that about \$7.2-7.5 million would need to be invested by the Regional Investment Fund (RIF) to support these proposals. She clarified that the exact cost determinations would be developed as proposals are implemented.

Monta Knudson asked if block leasing could be defined.

Nicole Stingh, Washington County, replied that block leasing, sometimes referred to as master leasing or agency leasing is where a service provider leases a block of units to be available for folks.

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Monta Knudson asked why county staff aren't interested in block leasing.

Nicole Stingh, Washington County, replied that it is not off the list and can be helpful in some populations. She noted that for individuals with high acuity, additional requirements are required for block leasing to be successful.

Monta Knudson shared that block leasing with community partners is an opportunity to service those with high acuity needs and leaving it out of the proposals is a missed opportunity.

Washington County Chair Kathryn Harrington noted that counties can still use block leasing. She reflected that this goal is asking for at most \$7.5 million and the RIF has at most \$49 million, but she is not sure if the other five goals would require funds of higher or lower amounts.

Patricia Rojas, Metro, replied that they do not have the answer for what the other goals will cost. She reflected that this memo is the starting space, and the next step would be to build out an implementation plan that includes budget details. She reflected Metro staff will think about how to be the connective tissue between goals and bring in staff capacity and expertise.

Washington County Chair Kathryn Harrington reflected that good progress is being made, that staff are working hard, and that voters want to see the results of regionalism. She reflected that the TCPB process is iterative and stated that the Landlord Recruitment and Retention proposal seems like a clear and good approach and suggested approving it.

Co-chair Eboni Brown asked what the timeline looks like for the other areas out of the 12 originally shared that weren't brought to the table today.

Nicole Stingh, Washington County, replied that there needs to be space for staff to work on other goals and that what is included in the proposal is what staff can commit to and implement within the next year. She reflected they can reassess in a year and make any changes as the process is iterative.

Co-chair Eboni Brown asked what the plan was for reevaluating what was not captured in the proposal.

Nicole Stingh, Washington County, replied that part of it will be developing future proposals for those goals.

Breanna Flores, Multnomah County, replied that part of the reasoning for prioritizing the five proposals were that they would be implemented on a timeline that the TCPB and folks in the community can see results.

Nicole Larson asked if there is a process in place to present all goals and their funding needs. She reflected that would make it easier to evaluate the funding request.

Liam Forst, Metro, replied that the TCPB has decided to do work iteratively and there is some risk involved with that. He reflected that it would be valuable to have a line of site with the RIF and that is worth a discussion. He added that Metro staff can come back and develop criteria for that line of site.

Zoi Coppiano shared that this work is crucial and it needs to start so landlords will be service provider allies. She reflected that landlord support is crucial to stabilize those with Regional Long-term Rental Assistance (RLRA) vouchers. She asked if the Clackamas County Support Line would assist landlords in addressing maintenance repair requests for tenants.

Vahid Brown, Clackamas County, replied that Clackamas County is doing that within the RLRA program and their landlord liaison program. He added that the situation Zoi is talking about would more likely fall under the align financial incentives proposal.

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Co-chair Matt Chapman reflected that this topic is big and the TCPB is to ensure ongoing progress in the work. He reflected that the TCPB is a co-creative group and that the proposal received is not an implementation plan. He motioned that the Metro would assume leadership and work with the counties to create an implementation plan that includes the recommendations previously adopted, and if a recommendation is not viable, to explain why not.

Madeline Kane, Kearns & West, noted that the time for this agenda item was running out, and asked if the HMIS presentation could be shortened.

Washington County Chair Kathryn Harrington stated that she did not want to leave without accomplishing something and that co-chair Matt Chapman's motion was not received ahead of time. She reflected that his motion says the county staff proposal was not based on previous TCPB work and she takes issue with that. She reflected that the community has been saying they need to see results and the TCPB can't afford to delay work. She stated that the work product is thoughtful and has enough direction to further the work.

Patricia Rojas, Metro, reflected that her interpretation of co-chair Matt Chapman's motion was to move work forward on the five priorities and look at the previous recommendations not included.

Co-chair Matt Chapman clarified his goal was not to be critical but to put the TCPB in a position where they received an implementation plan and have further conversation about the priorities within it to understand why some recommendations didn't move forward.

Jes Larson, Washington County, clarified that the Focus Strategies memo did inform the proposal and agreed that this was an opportunity for the counties and Metro to come together. She stressed that the counties have been collecting RIF funding and it is important to set instructions and programming to achieve regional efforts.

Steve Rudman shared that he is eager to get started on regional work and this is an opportunity to start. He stressed that Metro and the counties need to work together, and when he looked at the proposal, he didn't see Metro's name on it. He emphasized the need for trust for work to move forward.

Cristina Palacios stated that she felt disrespected as her hand was raised for a while and other members were called on. She shared that in the proposal, she didn't see translation or interpretation included and asked how equity would play a part. She shared that if it isn't captured in writing she is afraid it will be overlooked.

Nicole Stingh, Washington County, replied that translations will be a part of the training goals and the education and communication goals.

Breanna Flores, Multnomah County, added that equity will be embedded in each goal and apologized if they missed the mark on that.

Metro Councilor Christine Lewis asked what the framework for documenting tension points and decisions is to allow for transparency. She reflected that the tactics that were prioritized in the memo need more transparency, especially for the TCPB to release dollars.

Nicole Stingh, Washington County, replied the counties only included a narrative in the memo for this time, but that feedback will allow staff to do better next time.

Patrica Rojas, Metro, stated that Metro received and reviewed the counties' proposal, and they still have questions and work to do. She stated that they will pick it up from here and are hearing from the TCPB the ask for more information about what the money will do and the reasoning why certain areas aren't captured in the memo.

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Co-chair Eboni Brown reminded the TCPB that they do not need to do everything on the list today, and asked if the TCPB wanted to vote to move forward with the work that is in the proposal, and noted they can advocate for more in the future.

Monta Knudson asked for clarification from co-chair Matt Chapman's previous motion and reflected that the TCPB shouldn't let perfection be the enemy of good.

Co-chair Matt Chapman clarified his motion is consistent with co-chair Eboni Brown's, which is to move forward on the five priorities in the memo in the context of fleshing them out and adding additional explanations. He reflected that everyone here is operating in good faith and working hard on the issues and the best way to move forward is for Metro and the counties to develop an implementation plan with timelines, results, and metrics. He seconded co-chair Eboni Brown's motion.

Steve Rudman emphasized that he would like to see all the jurisdictions collaborating to move work forward.

Washington County Chair Kathryn Harrington asked to receive an electronic copy of co-chair Matt Chapman's motion.

Sahaan McKelvey asked if the TCPB is also voting for approval of the dollar amount.

Co-chair Eboni Brown stated that the dollar amount wouldn't be approved until the TCPB received and approved the implementation plan.

Co-chair Matt Chapman stated that he doesn't think the TCPB is in a position to approve dollar amounts until they receive more information, and that the motion is to move the work forward but not authorization of spending funds.

Jes Larson, Washington County, stated that her understanding is that the jurisdictions weren't bringing precise funding details for the TCPB to approve.

Liam Frost, Metro, clarified that the TCPB is responsible for approving financial investments as it is written in the charter.

Washington County Chair Kathryn Harrington reflected that the counties are providing their Year 3 Annual Report in June and the SHS Oversight Committee is developing its Year 3 Report. She stated that if the TCPB doesn't share anything with the Oversight Committee, the TCPB is saying that regionalism yields no results, and she thinks that the TCPB can do better than that and needs to start working forward.

Patricia Rojas, Metro, stated that there are lots of things in the proposal that are actionable, and Metro will come back with specifics to move the work forward, including details on the budget. She reflected that she is also hearing the TCPB ask to explore other options on the table and noted they can do both at the same time.

Washington County Chair Kathryn Harrington appreciated the work plan and noted it could benefit from improvement. She stressed the importance of being able to demonstrate results and moving work forward. She reflected on the level of work it takes to develop proposals and plans, emphasized the need for efficiencies, and shared she trusts staff to take TCPB feedback to detail specifics.

Nicole Larson reflected that it sounds like most everyone supports moving forward work in the goal areas and any aversion to approving funding is due to lack of information. She requested clarification on the RIF process and how and when the TCPB will have information for each of the goal areas since there is a finite amount of funds that should be equitably distributed.

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Monta Knudson stated that there is about \$40 million in the RIF, and this ask is about \$7 million, so there should be plenty of funds for the remaining goals. He stated that budgets are approved regularly without detailed implementation plans and he trusts county providers to do this work and ask for a reasonable amount of funds.

Metro Councilor Christine Lewis stated her concern in moving forward with the budget is that the number in the meeting packet is different than what is on the slide today. She suggested working towards a shared understanding of how the budget will work, with the understanding that it will be around \$7 million. She suggested allocating \$1 million today with the expectation of receiving a budget one-pager next month.

Cristina Palacios asked to receive the budget one-pager as soon as it is ready so the TCPB can vote first thing in the next meeting.

Steve Rudman stated that jurisdictional collaboration is important to move the work forward and that there is an urgency to do good work.

Jes Larson, Washington County, stated that the jurisdictions can work collaboratively and echoed support for staff to come together to refine the proposal.

Madeline Kane, Kearns & West, stated that the motion is to move forward with the 5 recommendations suggested by the counties, for Goal 2, with the budget they've suggested; with a commitment to submitting a completed, more in-depth proposal that includes where the money would go to and more details about each of those recommendations.

Jes Larson, Washington County, stated that the additional components will be budget, specificity in the plan, and addressing other items not included at this time while bringing Metro fully into the work with us.

The TCPB approved the motion.

HMIS Strategic Sourcing Analysis Update

TCPB did not discuss this agenda item.

Closing and Next Steps

Washington County Chair Kathryn Harrington asked what the ask was for the TCPB regarding the HMIS presentation and reflected that there needs to be more time on agendas for the TCPB to take action and ask questions.

Co-chair Eboni Brown stated that the co-chairs will be meeting with Metro staff next week to plan the meeting and asked members to email her for any topics to be discussed.

The next steps are:

- Metro to share an electronic copy of co-chair Matt Chapman's motion.
- Metro to develop and share criteria for a line of site for all goals and funding needs/requests.
- Jurisdiction staff to develop a more in-depth Landlord Recruitment and Retention proposal, including explanations of items not included and a detailed budget by March's meeting.
- Next meeting: March 13th, 4-6pm



Tri-County Planning Body Meeting Summary

Adjourn

Adjourned at 6:20 p.m.

HMIS Technology Strategic Sourcing Analysis

Recommendations and Final Report Executive Summary

February 2024

Engagement #: E000653 | Version 2



DRAFT

Gartner partnered with Multnomah County IT to conduct a Strategic Sourcing Analysis of the Tri-County HMIS Implementation

Context:

The Tri-County's current Homeless Management Information System (HMIS) was implemented in 2006 with the primary purpose of data collection for HUD reporting and administration. Since that time, the homelessness response system has changed dramatically, including changes to the overall homeless services landscape, regionalization of services, and recent State and Regional investments in Housing Services that will advance the system over the next 7-10 years.

Project Goal and Objectives:

- Establish a **comprehensive understanding** of the Tri-County HMIS **current state** and **future state vision**.
- Identify the **business capabilities** required in the future state vision.
- **Identify gaps** between the current HMIS usage and the future-state vision for the HMIS.
- Provide **insights** into the current **market** of HMIS products and solutions available.
- Provide **recommendations** and a final report to guide the Tri-County area toward achieving their HMIS vision.

Findings from provider, participant, program staff, system administrators, IT, County, and Regional Leadership formed the foundation of this HGIS analysis.

Conducted **20+ stakeholder interviews** and reviewed **documentation** to inform a **Current State Summary** and **Future State Vision** for the Tri-County HGIS.

Developed a **Business Capability Model (BCM)** for the Tri-County homelessness response system's **needs for the HGIS**.
Completed a **Gap Analysis** identifying which of the defined capabilities are performed within the HGIS.

Structured a **Market Scan Framework** based on the BCM and Vision to apply against potential HGIS vendors.
Performed a **Market Scan** analyzing the **top five best-fit HGIS solutions** based on the Market Scan Framework.

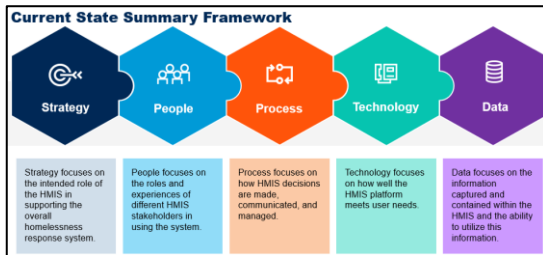
Identified **key project findings about the Tri-County HGIS** and its support system.
Crafted **Recommendations** and a **roadmap** to address key findings as part of a **Final Report**.

Step 1: Understand

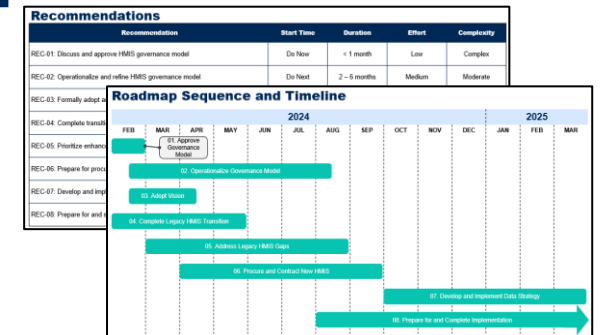
Step 2: Identify

Step 3: Research

Step 4: Analyze



Criteria	Vendors				
	ADSYSTECH	Bitfocus	Bonterra	eccovia	WellSky
OVERALL	+	+	+	+	+
Functional Needs	+	+	+	+	+
Technical Needs	+	+	+	+	+
Vendor / Product Alignment	+	+	+	+	+



Stakeholders consistently envision an HMIS that supports all the care delivery needs of a modern homelessness response system.



Facilitate regional strategies and data standardization across the homelessness response system



Enable the goals of each county throughout the Tri-County area



Enable equitable access for people seeking care



Provide an effective tool to support people providing care



Provide a consistent tool for standardized data collection and analysis



Facilitate cooperation within and across systems of care



Provide easy access to the information needed to make strategic decisions



Ensure compliance with HUD and other reporting requirements

The Legacy HMIS cannot fully support the expanded HMIS vision. The HMIS impacts the homelessness response system's effectiveness and limits its insights.

Key Takeaways

1

The entire Tri-County regional homelessness response system relies on the HMIS, a **siloed, outdated**, compliance-focused platform with **poor quality data** as its single source of insight.

2

The **HMIS hinders the Tri-County** area's ability to effectively demonstrate the **impact of funding** being spent, measure the **effectiveness of housing** interventions, **ensure equitable care**, and **efficiently meet compliance reporting** requirements.

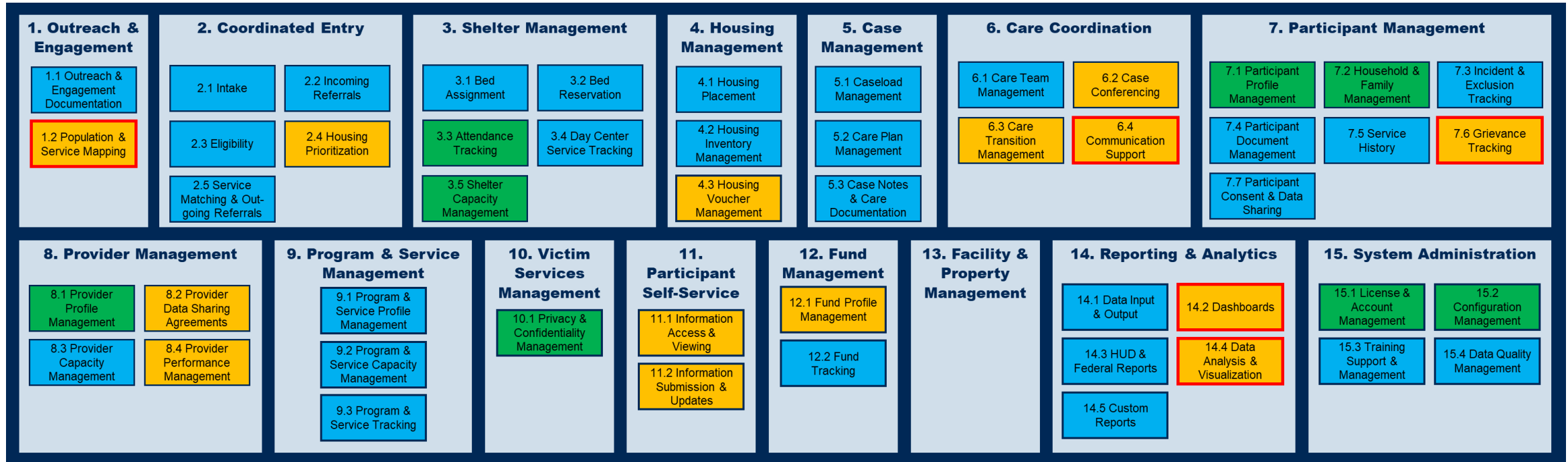
3

The HMIS is **poorly designed** for current needs – users are **actively working around and against the system**, creating **security, data quality, and client care issues**.

4

Functional and technical limitations of the legacy HMIS hamper the ability of the Tri-County homelessness response system to achieve its vision for the HMIS as a tool that supports care delivery.

There are significant business capability gaps in the legacy HMIS solution – only 8 out of 50 capabilities are fully performed within the HMIS.



Rating Definitions

- Capability fully performed within the HMIS
- Capability partially performed within the HMIS
- Capability not performed within the HMIS
- Data captured within the HMIS
- Data not captured within the HMIS

Few business capabilities are done exclusively in the HMIS, and many are not done inside the current HMIS at all.

The HMIS does not fully support many essential business capabilities, dramatically **increasing the efforts required to complete them** and the **burden placed on providers and county staff**. These capabilities include:

Outreach & Engagement

- Population & Service Mapping

Coordinated Entry

- Housing Prioritization

Housing Management

- Housing Voucher Management

Care Coordination

- Case Conferencing
- Care Transition Management
- Communication Support

Participant Management

- Grievance Tracking

Provider Management

- Provider Data Sharing Agreements
- Provider Performance Management

Participant Self-Service

- Information Access & Viewing
- Information Submission & Updates

Fund Management

- Fund Profile Management

Reporting & Analytics

- Dashboarding
- Data Analysis & Visualization

Several of these capabilities are critical to achieving the expanded HMIS Vision.

Technical limitations of the current HMIS restrict the ability to perform many business capabilities within the current solution.

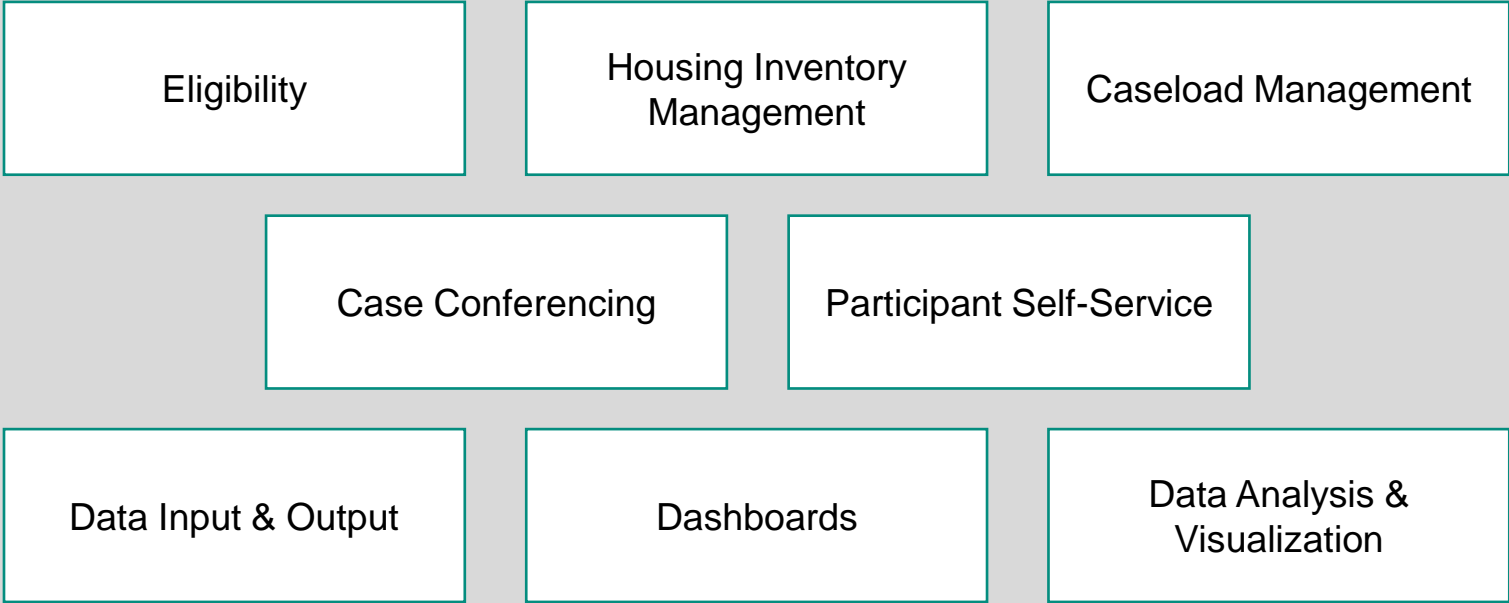
The current HMIS does not support:

- 1 **Mobile compatibility** for access in the field
- 2 **Geospatial data** for logging services
- 3 **File imports** for easily entering bulk data
- 4 **Integrations** with other solutions for efficiently sharing information
- 5 **Data warehousing** for collecting data from multiple systems of care
- 6 **Customized analytics and dashboarding** for drawing insights

As a result of these limitations, the current HMIS solution **hampers the Tri-Counties' ability to work towards their collective vision for the HMIS.**

Improvements can be made to the legacy solution to help address some of the gaps.

Key capabilities that re-configuring the system may improve:



Key pain points to address with the legacy vendor:

- Lack of **data visibility**
- Resolution of **duplicate records**
- Minimizing creation of **duplicate records**

The Tri-Counties will need to determine the **appropriate level of resources** to invest in the legacy solution given that it **cannot meet all the Counties' desired capabilities**.

There are solutions in the market that are likely to better meet the Tri-Counties' HMIS vision and needs.

Key Takeaways

1

There are **two primary HMIS vendors** that service the 15 Continua of Care (CoCs) with the largest homeless counts. These vendors are the most likely to meet the Tri-Counties' HMIS vision and needs.






2

There are additional vendors that **may also meet the Tri-Counties' needs** but are less experienced with complex CoCs or are less HMIS-focused.

3

These solutions all offer significant functional and technical **benefits over the Tri-Counties' legacy HMIS solution.**

Other large, complex Continua of Care use primarily **two vendor solutions** that are **better aligned** to the Tri-Counties' HMIS needs.

Criteria	Vendors				
	 ADSYTECH	 Bitfocus	 Bonterra	 eccovia	 WellSky ★
OVERALL	M	H	M	H	M
Functional Needs	H	H	H	H	M
Technical Needs	H	H	H	H	L
Vendor / Product Alignment	M	H	L	H	M

Other than the Tri-County implementation, all HMIS for the 15 HUD-defined Continua of Care with the largest homeless counts as of 2023 are provided by Bitfocus or Eccovia or have a custom local solution.

★ Denotes Tri-County legacy HMIS vendor

Implementation of a new HMIS will be required to provide the Tri-Counties with the desired functional and technical capabilities to achieve the expanded HMIS vision.

Key Takeaways

1

The Tri-Counties will need to **prioritize the business and technical capabilities** required for the HMIS and **determine the best procurement strategy** to acquire the solution that best supports and enables the HMIS Future State Vision.

2

The HMIS procurement will **require business process reengineering** to understand how to operationalize the expanded HMIS vision and ensure the **effectiveness of the new HMIS**.

3

Identifying and addressing participant, provider organization, and staff needs **in advance of implementation** will be critical for success.

Identified recommendations position the Tri-County to achieve its expanded HMIS vision.

The recommendations on the following pages ensure:

1

The right stakeholder representation is involved in HMIS decision-making at the right levels

2

All short and long-term HMIS decisions are focused toward achieving the same vision

3

Limited investments improve use of the legacy HMIS in the short-term

4

A fully capable HMIS solution enables the HMIS vision in the long-term

5

A comprehensive strategy ensures the value of the HMIS data to the Tri-County homelessness response system

Gartner has identified 8 recommendations to best position the Tri-Counties to achieve its expanded HMIS Vision.

Recommendation	Urgency	Effort	Complexity
REC-01: Discuss and approve HMIS governance model	Do Now	Low	Complex
REC-02: Initiate and operationalize HMIS governance model	Do Next	Medium	Moderate
REC-03: Formally adopt and socialize expanded HMIS vision	Do Next	Low	Moderate
REC-04: Complete transition of legacy HMIS administration	Do Soon	Low	Moderate
REC-05: Prioritize enhancements to address legacy HMIS gaps	Do Soon	Medium	Moderate
REC-06: Prepare for procurement and contract for new HMIS	Do Soon	Medium	Complex
REC-07: Develop and implement data and reporting strategy	Do When Ready	High	Complex
REC-08: Prepare for and successfully implement new HMIS	Do When Ready	High	Complex

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Tri-County Planning Body landlord recruitment goal

Regional implementation plan

March 2024



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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Tri-County Planning Body Landlord Recruitment Goal



Regional Implementation Plan - March 2024

Tri-County Planning Body Landlord Recruitment Regional Goal

Increase the availability of readily accessible and appropriate housing units for service providers.
Adopted May 10, 2023¹.

Regional Issue

Private market housing plays a vital role in ending people's homelessness. Historically, local service providers, and individual case managers, have each established their own ongoing relationships with landlords who have proven to be reliable partners. This has meant that case managers have needed the skillsets to both manage relationships with landlords/property managers and successfully execute their primary responsibility: to provide the appropriate support for someone exiting homelessness into stable housing.

This approach perpetuates silos and limits the opportunity to maximize access to units because it relies too heavily on individual relationships. This approach does not support prioritization or equity efforts. Recruiting and retaining landlord cooperation and commitments is challenging because landlords don't understand the requirements of local vouchers (RLRA), there is prejudice against people exiting homelessness, and case managers lack a real-time list of available units in which to place their clients. Each of the three Counties have made efforts to address this, to varying degrees of success.

Racial Equity Considerations

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

The Regional Landlord Recruitment goals mark our first opportunity to implement a plan to create regional policies and programs that will result in a regional increase in the access to rental units. The historical and contemporary experiences of housing discrimination that influence the housing placement outcomes for Black, Indigenous, and Other Communities of Color, immigrants and refugees, and LGBTQ+ communities, have an impact on where people can live. It is vital to identify a process to consider how these proposed strategies will increase housing choice, impact historically oppressed communities, and reduce disparities among historically marginalized groups.

To this end, the Counties and Metro commit to ongoing coordination among equity staff, with a goal of ensuring all strategies contribute to the reduction of racially disparate outcomes in housing placement and retention. The tri-counties and Metro are in active conversation to develop a plan for coordinating these strategies. As equity capacity is built out across the region, designated equity staff

¹ Tri-County Planning Body Goal and Recommendation Language, May 10, 2023. <https://www.oregonmetro.gov/sites/default/files/2023/10/26/2023-tcpb-goals-and-recommendations-20230510.pdf>

will convene and produce equity considerations by utilizing a regionally informed equity lens tool to inform the enacted strategies for the overarching TCPB goals. Convening equity staff from each of the three counties ensures that our regional equity strategies are informed by expertise on the unique equity needs of each county and the people they serve. As each strategy advances, the tenets of affirmatively furthering fair housing will be central to implementation efforts. This includes language access needs and additional considerations for materials to proactively educate landlords on fair housing.

Planning and Implementation Considerations

In developing the regional plan structure, the TCPB adopted in December 2022 a set of criteria intended for reviewing proposed implementation plans. We have utilized those criteria to summarize below how staff are addressing additional considerations in this regional implementation plan.

- **Compliance with TCPB Charter**

The TCPB charter states that the TCPB is responsible for developing and implementing a Tri-County initiative and will be responsible for identifying regional goals, strategies, and outcome metrics related to addressing homelessness in the region. To this end, one of the TCPB's responsibilities is to review proposals that outline programmatic strategies and financial investments from the Regional Investment Fund (RIF) that advance regional goals, strategies and outcome metrics. This implementation plan provides the committee with the information necessary to carry out the assigned function outlined in the charter.

- **Feasibility**

The Counties and Metro have determined that this implementation plan is feasible to fulfill given the requested funding allocation, the proposed technical support requested by qualified consultants, and leveraging the established meeting space and staffing for ongoing coordination in the landlord liaison meetings.

- **Staff capacity**

The implementation plan counts on leveraging existing staff capacity and meetings to work together in the operationalization and on-going coordination of the work, and ensuring landlord liaison work is supported by the RIF. This plan also considers identifying tasks that should be supported by qualified consultants for strategic support. An important consideration will be to understand the potential trade-offs in the pace of implementing, given that more pre-work will result in a stronger program while there is an immediate need for landlord engagement.

- **Infrastructure**

It will take our region time to create a responsive system that addresses regional and local needs in our high-rent, low vacancy communities. Additionally, as new initiatives launch, roles and responsibilities for each County and Metro must be collaboratively identified. The plan proposes to utilize the expanded capacity of the Metro Housing Department and within each County to lead this work.

- **Local Implementation Plan (LIP) Alignment**

Strategies to recruit landlord and building owners to participate in supportive housing programs has been identified as a need in Washington County's LIP (p. 31), Multnomah County's LIP (p. 18) and Clackamas County's LIP (p. 148).

- **Unintended Consequences**

This proposal recognizes that a major unintended consequence of the implementation plan would be adding a burden to case managers to educate landlords. Coordinating a communication and education plan, aligning financial incentives, studying a centralized unit tracking database, implementing quality problem-solving services, and considering ways to support mission-driven property management are all strategies meant to relieve this burden on case managers. Provider training on barrier removal should be a separate training that case managers take to support building a positive foundation for future tenants and their landlords as well as building capacity to negotiate with landlords and property management.

Unintended consequences of these strategies include leaving behind culturally specific providers and BIPOC program participants who depend more on informal connections to gain housing. Careful consideration was made within each strategy to limit these unintended consequences as developed, and the four jurisdictions will work collaboratively to combat these and mitigate other potential impacts that are not aligned with the values we lead this work with. Additionally, an equity lens will be utilized along the implementation process to ensure continued efforts to effectively support this vital group of partners.

- **Building on Existing Efforts**

SHS funding, a valuable local resource, caters to our region's specific needs, which avoids duplicating existing efforts. This implementation plan builds on existing efforts and has considered service providers' frustrations stemming from the constraints of under-resourced programs. SHS funding can alleviate these frustrations and, through strategic planning, we can uphold the vital community relationships service providers have forged with property owners. All the strategies will be centered around program participants. We do this by ensuring sufficient service levels for case management and other wraparound support, while upholding the commitments we have made to property owners. The best incentives we can offer to landlords in our region are services that support long-term tenant stability. This proposal prioritizes strategies that will expedite housing placement for those experiencing literal homelessness, diminish racially disparate housing and retention outcomes, and mitigating housing discrimination experiences for prospective tenants and service providers.

Budget

We anticipate \$7.81-8.06 million to support this goal. The exact cost determinations will be developed as this strategy is implemented, staffing needs arise within Counties, and scopes of work are defined with consultants.

Milestones will be shared in the TCPB's monthly progress reports, and more substantial information, including budget expenditure, will be provided quarterly starting in Q3 (August 2024) to align with current SHS program reporting frequency.

Item	Cost
Strategy #1: Communication and education plan	\$50,000-150,000
Strategy #2: Align financial incentives	\$100,000
Strategy #3: Tracking and access to unit inventory*	\$810,000
Strategy #4: Prioritize quality problem-solving services	\$500,000
Strategy #5: Investigate needs for property management	\$50,000-100,000
Existing work	
Risk Mitigation program	\$6,000,000
Support staffing for County landlord liaison	\$300,000-400,000
Total	\$7,810,000-\$8,060,000

*As this strategy has developed, the costs have increased.

Strategy #1: Communication and education plan

Program Description

The three Counties and Metro will hire a consultant to develop a regional communications campaign focused on landlord education using Metro and Regional Investment Fund (RIF) resources alongside capacity in the landlord liaison group. The plan includes educating landlords about the different rent assistance programs, highlighting the benefits of participation from landlords, and training for housing case managers on causes of racial disparities in housing and homelessness. The overarching communication campaign will allow landlords to access all necessary information in one place, and consequently will reduce the workload of case managers, whose focus can shift to their primary work of supporting tenants. It may have the added benefit of increasing understanding of fair housing.

It is imperative that this communication and education campaign reaches landlords of diverse backgrounds. Efforts to support this include focusing on: areas with a connection to culturally specific groups, social and traditional media outlets created to support BIPOC communities, schools with high concentrations of BIPOC students, and resources and events within BIPOC communities. Language access best practices will be embedded into the development of materials and strategies.

Leveraging the existing landlord liaison meetings, County and Metro staff will use this space to work together in the operationalization and on-going coordination of the implementation of this strategy.

This strategy supports two areas of regional alignment: 1) programmatic, in the form of a regional communication and outreach plan that ensures a common approach across Counties and 2) administrative, with Metro supporting the functions of hiring a consultant and ensuring a central information hub (website).

Timeline and Milestones

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

It is anticipated that the items listed in the chart below will be complete by the end of Program Year 4. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Deliverables	Details	Responsible Party
Regional awareness campaign, directed toward landlords, about existing financial incentives. This will include a focus on reaching culturally specific landlords.	<ul style="list-style-type: none"> Identify details of various housing voucher and incentive programs Launch info on Metro website Feedback from landlords and landlord organizations can be passed through Metro Housing Department and incorporated into website edits, training, and outreach materials Develop communication and education materials in collaboration with landlords and landlord organizations 	Contracted communications consultant (Metro), County staff (landlord liaisons)
Training for housing case managers	<ul style="list-style-type: none"> Training to include planning and zoning laws (redlining) and predatory lending Education about housing voucher and incentive programs and their impact on racial disparities 	Counties, housing case managers

Regional Investment Fund Utilization

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

Budget
Regional Awareness Campaign
Training for housing case managers
Total: \$50,000-\$150,000

Metrics

Metrics will be refined after a consultant is on board, and new metrics **may** be added.

Metric	Goal
Educational campaign	Reach 200 unique landlords/property owners/property management
Metro website up and running	Fall 2024

Metro website, with listed housing voucher types and incentives, visits increase	A goal will be set in collaboration with the consultant
--	---

Strategy #2: Align financial incentives

Program Description

Regionalizing financial incentives for rental housing owners and managers (housing providers) can create opportunities for Clackamas, Multnomah, and Washington Counties to expand access to existing units in the rental housing market, which will increase the rental units available to people experiencing homelessness. Counties and Metro will further a regional approach by conducting research to develop a regional policy for financial incentives, considering a regional program to administer incentives, and identifying duplicative administrative functions that can be consolidated to reduce overall administrative costs to deliver incentives.

Equity considerations include creating a regional policy that can be implemented while also being accessible to divergent needs of different providers and communities. The creation of incentives needs to address how they will be used to reduce racial disparities and incidents of housing discrimination while also setting a trend for long-term tenant stability.

This strategy supports one area of regional alignment: 1) policy, by ensuring that landlord incentives are included in RLRA vouchers, namely renters' insurance and promotion of the Risk Mitigation Funds, would be taken across the region. Counties may explore feasibility of expanding financial incentives beyond RLRA to other housing programs, pending cost.

Timeline and Milestones

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

It is anticipated that the items listed in the chart below will be complete by the end of Program Year 4. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Deliverables	Details	Responsible Party
Research to consider increasing current regional financial incentives, whether to add additional housing programs (like rapid rehousing) or to increase payments	<ul style="list-style-type: none"> • Create materials on existing landlord incentive incentives across programs • Scope research questions • Conduct research on costs and benefits • Determine course of action, next steps 	County and Metro staff

Training for housing case managers	<ul style="list-style-type: none"> Education about financial incentives for RLRA and existing incentives for other programs, such as Rent Well and the Housing Choice Voucher Landlord Guarantee Program 	Counties, housing case managers
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Regional Investment Fund Utilization

Exact cost determinations will be developed as this strategy is implemented, staffing needs arise within Counties, and scopes of work are defined with consultants. Contracts for strategy #1 may be leverage for these activities.

Item
Research expanding financial incentives
Material development
Total: \$100,000

Metrics

Metrics will be refined after a consultant is on board, and new metrics **may** be added.

Metric	Goal
Estimated cost for broadening financial incentives	Complete by Winter 2024
Develop materials on existing incentives	Complete by Winter 2024

Strategy #3: Tracking and access to unit inventory

Program Description

Currently, there are multiple systems across the region that track and provide access to unit inventory and varying levels of success with placing households into housing that fit their needs. To better align these systems across the region, Multnomah County will pilot an initial approach, and then a study will be conducted to assess the feasibility of expanding this approach regionally.

Housing Connector will provide dedicated staff to implement unit acquisition and tracking services to Multnomah County. Housing Connector is an existing organization that has developed an online platform and creates partnerships with landlords to track available rental units and make them accessible to housing program participants. Housing Connector will recruit and maintain relationships with property partners and community organizations, provide training and ongoing support with platform navigation, and track key metrics on housing providers.

This strategy supports two areas of regional alignment: 1) programmatic – potential for uniform platform to support unit access efforts across the region and 2) administrative, with Multnomah

County running a pilot with the purpose of information sharing to inform considerations and future decisions around regional adoption.

Timeline and Milestones

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

It is anticipated that the items listed in the chart below will be complete by Summer 2026. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Deliverables	Details	Responsible Party
Establish regional areas of consideration	<ul style="list-style-type: none"> Identify key metrics considerations for regional adoption 	Counties
Multnomah County contracts for FY25 Housing Connector Pilot	<ul style="list-style-type: none"> Scope of work defined with regional considerations HC submits biannual progress reports and SHS quarterly reports 	Multnomah County
Regional assessment of pilot findings	<ul style="list-style-type: none"> Review findings to inform report on barriers/opportunities for broader adoption. 	Counties and HC

Regional Investment Fund Utilization

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

Item
Contract with Housing Connector for Multnomah County Pilot
Total: \$810,000

Metrics

Metrics will be refined after a consultant is on board, and new metrics **may** be added.

Metric	Goal
Number of property partners gained	30
Number of property units listed	10
Percentage of units below FMR	70%
Number of households housed	72

Strategy #4: Prioritize quality problem-solving services

Program Description

To recruit and retain landlords, our system needs to be responsive to concerns and problems that arise during tenancy. Case managers are currently responsible for most of this work, with support from the Landlord Liaisons.

Metro and the Counties will work to expand services available to landlords to resolve issues with specific tenants and support communication with case managers. As a first step for this upcoming program year, Clackamas County will pilot a “hotline” for landlords to call that will add another layer of support and take some strain off case managers. This landlord hotline serves as a backup to case managers, recognizing the relationships case managers develop with tenants and landlords are vital, should be strengthened, and should not be impacted negatively. The purpose of the hotline is to reduce trauma to the tenant, preserve the relationship with the landlord, enhance landlord recruitment, and prevent evictions.

When landlords call, trained staff will be responsive to questions and coordinate between landlords, case managers, and others to quickly address problems. Hotline staff will act as a navigator for landlords to access information on housing programs and incentives, access RMP funds as needed, and identify and connect with the appropriate case manager. Hotline staff will support case managers with advice on communication with landlords.

This approach will begin with participants in RLRA and Continuum of Care Permanent Supportive Housing programs because access to a case manager is vital to its initial success. During evaluation of the pilot, Counties and Metro will consider supporting landlords participating in other housing programs that provide ongoing rental assistance.

This strategy supports two areas of regional alignment: 1) programmatic—a hotline ensures a common approach across Counties and will avoid confusion from landlords that have units in multiple Counties and 2) administrative, with one County leading the planning and contracting on behalf of the region. Consideration of regionalizing this strategy is contingent to the assessment of outcomes/effectiveness of this pilot.

Timeline and Milestones

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

It is anticipated that the items listed in the chart below will be complete by Winter 2025. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Deliverables	Details	Responsible Party
Contract with service provider for 24/7 hotline coverage	<ul style="list-style-type: none"> • Initiate an RFP or program offer • Evaluate and identify contractor 	Clackamas County
Hotline staff in place	<ul style="list-style-type: none"> • Hire hotline staff • Train staff on different housing programs, risk mitigation programs, 	Contracted service provider

	<p>incentives, landlord tenant law, and fair housing law</p> <ul style="list-style-type: none"> • Develop/explore problem solving strategies tailored to the unique needs of culturally specific providers and their participants/communities 	
Case management tracker complete with a plan for regular updates	<ul style="list-style-type: none"> • Create case management tracker for hotline access to facilitate coordination between hotline staff and case managers 	Clackamas County
Hotline is live and Clackamas County landlords know how to access it	<ul style="list-style-type: none"> • Broadly advertise the availability of the hotline to landlords and service providers 	Contracted service provider, with County/regional support

Regional Investment Fund Utilization

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

Item
Hotline Staff
Advertising
Training costs
Total: \$500,000

Metrics

Metrics will be refined after a consultant is on board, and new metrics **may** be added.

Metric	Goal
Decrease in evictions among voucher-holders	10%
Landlords report they feel they have the information and support they need, in annual survey	90%
Decrease in costs due to tenant-caused damages	5%

Strategy #5: Investigate needs for property management

Program Description

There are very limited property management options in the region, and current funding is not sufficient to provide the level of services necessary for successful project-based permanent supportive housing (PSH). Many existing property management companies lack the skills necessary to effectively serve this highly traumatized population, and many of the existing nonprofit housing developers and housing service organizations do not have the skills necessary to provide effective Landlord Recruitment Regional Implementation Plan

property management. This lack of options, particularly in project-based PSH, is impacting the rates of referral and lease up. To more successfully place high-needs participants in affordable housing, stable and effective property management is vital.

The next step will be for Metro to contract with an entity in collaboration with the Counties and the state to conduct an exploratory study. The purpose of this study is to identify steps to ensure stable, mission-driven, and effective property management for affordable housing and project-based permanent supportive housing tenants, centering their needs and establishing a contracted partner(s) to provide this service for SHS funded units in all three counties. The study is a necessary step, as this strategy has not yet been fully examined through consultant contracts.

Possible areas of study for the consultant include: partnering nonprofit housing developers and/or housing services providers with property management companies to build property management services into their service array; working with a for-profit B corporation or other mission-driven entity to train people with lived experience of homelessness, housing instability, affordable housing residency, and/or PSH program participation to become property managers.

This strategy supports one area of regional alignment: 1) administrative, with Metro leading the study and consolidating contracting on behalf of the region.

Timeline and Milestones

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

It is anticipated that the items listed in the chart below will be complete by Spring 2025. Staff will work on developing timelines for each deliverable listed below which will be reported to the committee in the monthly or quarterly progress reports.

Deliverables	Details	Responsible Party
Contract with consultant to study mission-driven property management options	<ul style="list-style-type: none"> • Initiate an RFP or program offer • Evaluate and identify contractor • Outline scope of work 	Metro with input from Counties and state
Conduct study	<ul style="list-style-type: none"> • Identify needs and gaps in current affordable housing and project-based PSH properties • Include engagement process with housing services providers, landlords, property management companies, and affordable housing/PSH residents • Consider needs or BIPOC communities 	Contracted Consultant

	<ul style="list-style-type: none"> • Provide options for mission-driven property management 	
Identify one or more strategies to implement	<ul style="list-style-type: none"> • Convene workgroup to consider options that result from the study 	Metro, with support from Counties and the State

Regional Investment Fund Utilization

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

Item
Contract with consultant
Total: \$50,000-100,000

Metrics

Metrics will be refined after a consultant is on board, and new metrics **may** be added.

Metric	Goal
Identify one or more strategies to achieve mission-driven property management	Complete by Spring 2025

Appendix: Crosswalk with Focus Strategies Unit Acquisition Memo

Source: Focus Strategies, “National and Local Approaches to Unit Acquisition and Opportunities to Strengthen Local Unit Acquisition Efforts” (10.30.23), pp. 10-25. Comments in italics based on consultation between Counties and Metro. Please note that recommendations that did not advance at this moment are under consideration for future efforts. It could be that the recommendation is not yet prime for regionalization as it may not improve or address regional landlord recruitment needs in all three counties, but may be a strategy to consider for one or more counties.

1) Apply an equity lens to all program design and implementation work	<i>Included in the County’s existing work and supported through staff positions, local advisory bodies, community engagement, and technical consultants. See Racial Equity Considerations section above.</i>
2) Develop a comprehensive communication and education program for housing providers	<i>Included in Strategy #1: Communication and education plan.</i>

<p>3) Consolidate partnership formation responsibilities</p>	<p><i>The Counties recommend this action area be considered in a second phase once the initial strategies are successfully underway. Multnomah County is currently implementing a similar approach through Housing Connector. We will study and learn from this implementation to consider potential scaling as a regional strategy.</i></p> <p><i>Metro and the Counties will revisit this recommendation in FY 25-26.</i></p>
<p>4) Rationalize the system of financial incentives</p>	<p><i>Included in Strategy #2: Align financial incentives. In addition, the following incentives are accessible and aligned within Washington, Clackamas, and Multnomah County: For renting to a participating RLRA household, landlords have access to repair funds up to \$1,000 for required repairs, landlord incentives that include holding fees, and a minimum \$500 landlord incentive.</i></p> <p><i>Currently, flex funds allow for additional deposits to be paid to landlords in addition to purchasing renters insurance for participants.</i></p>
<p>5) Explore expanding agency leasing for those with the greatest barriers</p>	<p><i>Although block/agency leasing can be an effective strategy for unit acquisition, the Counties believe this is not a priority to regionalize in a first phase. The ability to administer block or agency leasing depends on availability of properties/units and relationships with owners and property managers. That landscape is different in each County, creating challenges to a regionalized approach. Each County may explore their own strategies in the realm of block leasing, as there are many models to follow that work for different goals and circumstances. Block/agency leasing is allowable within existing programs.</i></p> <p><i>We hear from providers the need for housing options for people with very intense needs, such as severe and persistent mental illness or acute substance use disorder. Agency leasing is one option, and the Counties want to explore expanding transitional housing, respite housing, and integration with the health system to address these needs with wrap around services.</i></p>

6) Prioritize quality problem solving services	<i>Included in Strategy #4: Prioritize quality problem-solving services.</i>
7) Consolidate key aspects of tracking and providing access to unit inventory	<i>Included in Strategy #3: Tracking and access to unit inventory.</i>
8) Invest in services beyond housing provider partnerships	<i>Integration with Rent Well and other programs to be considered as part of strategy #2.</i>
9) Conduct an evaluation of current state of landlord recruitment and participation	<i>This will be a consideration of the consultant hired for strategy #1</i>
10) Invest dollars into a regional fund for unit retention and incentivize long-term unit availability	<i>The intended purpose of the Risk Mitigation Program is to support this, and the investment the RMP is included in this plan</i>
11) Conduct an examination of other services that are providing housing units beyond SHS to align resources and expand housing availability	<i>This will be included as part of strategy #2.</i>
12) Identify and communicate known barriers and root causes preventing housing placements	<i>This will be included as part of strategy #1.</i>

13) What would a mission-based property management engagement look like?	<i>Strategy #5 will investigate this question.</i>
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Tri-County Planning Body (TCPB) Regional Landlord Recruitment Goal Timeline Last updated March 2024.

November 2022 TCPB Meeting

- The TCPB discussed the proposed Regional Plan workflow
- The TCPB engaged in issue prioritization

December 2022 TCPB Meeting

- TCPB reviewed the draft recommendation filtering criteria (see TCPB Workflow and Decision Points document [December 2022])
- The TCPB continued to engage in issue prioritization
- Steve Rudman motioned to vote on approving Metro staff to identify bottom-up capacity issues and models of housing connector programs. TCPB approved the task for Metro

January 2023 TCPB Meeting

- Prioritization of work categories (i.e., capacity strategies, regional long-term rental assistance [RLRA], data, and systems alignment)
- Overview of the research scope and deliverable of landlord engagement research
 - Steve Rudman proposed adding staff recommendations as a deliverable
 - Metro updated landlord engagement research scope to include staff recommendations, a focus on chronically homeless and application of equity lenses
- The TCPB approved for Metro and County staff to provide a high-level analysis of the top voted strategies including support a region wide landlord recruitment program that also provides wrap around services with leveraged funds from the jurisdictions

February 2023 TCPB Meeting

- Prior to the meeting, Metro staff shared a memo with the TCPB on Regional Landlord Recruitment and Retention Policy Summary, per a request from the TCPB in December
- Metro and county staff translated the TCPB's voted upon priorities into regional goals
- Liam Frost presented on the regional challenge and goal for regionwide landlord recruitment. He also shared Metro and county staff recommendations on how to achieve the goal.
- The TCPB approved the regionwide landlord recruitment goal.

April 2023 TCPB Meeting

- During staff updates, Metro staff shared that Metro had received a contractor proposal for the Regional Landlord Recruitment goal work

May 2023 TCPB Meeting

- Metro shared Focus Strategies' Landlord Recruitment Project Scope with TCPB

June 2023 TCPB Meeting

- Landlord liaisons from the counties presented on regionalizing landlord liaison work, the RLRA Risk Mitigation Program, landlord engagement, and coordinated outreach

November 2023 TCPB Meeting

- Focus Strategies presented their findings and areas for further exploration
- TCPB members provided feedback on Focus Strategies Unit Acquisition Memorandum

December 2023 TCPB Meeting

- The TCPB took a survey on the Landlord Recruitment Outcome Indicators to confirm which recommendations should move forward to the counties
- County staff committed to sharing a progress update on counties' proposal during February 2024's TCPB meeting
- The TCPB approved moving forward with all recommendations in the Focus Strategies Unit Acquisition Memorandum and other recommendations generated by committee members

January 2024 TCPB Meeting

- County staff shared a proposal during the TCPB meeting
- The TCPB approved moving forward with the 5 recommendations suggested by the counties, with the budget they suggested; with a commitment to submitting a completed, more in-depth proposal that includes where the money would go to and more details about each of those recommendations.
 - In depth proposal elements include: budget, specificity in the plan, and addressing other items not included at this time.
 - Counties commit to bringing Metro fully into the work.

METRO SUPPORTIVE HOUSING SERVICES TRI-COUNTY PLANNING BODY

Monthly progress report | March 2024

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

TRI-COUNTY PLANNING BODY REGIONAL GOALS*

Goal	Progress
Unit/landlord recruitment and retention	Metro and county staff developed a Regional Implementation Plan for the five strategies the counties prioritized to advance the Regional Landlord Recruitment goal. The TCPB will consider a vote to approve this Regional Implementation Plan at their March meeting.
Coordinated Entry	The Coordinated Entry Regional Alignment Workgroup (CERAW) continues to meet monthly, with the third meeting on February 12 th . At the January 8 th CERAW meeting, consensus on four major areas of collaboration emerged. These items are undergoing further refinement ahead of presentation to TCPB. On January 29 th , we held the first meeting of the data sharing workgroup, focused on both sharing Coordinated Entry data across counties and on sharing Coordinated Entry data with the healthcare system. Work is beginning on gathering and utilizing input from those with lived experience throughout the process.
Healthcare system alignment	The new leadership, meeting, and workgroup structure is operating. On January 29 th , we held the first meeting of the data sharing workgroup, focused on both sharing Coordinated Entry data with the healthcare system and sharing Coordinated Entry data across counties. Planning for implementation of the Medicaid Waiver is focused on the administrative structure and flow of funding, and it continues at the regional leadership meetings. Homepage has met with staff from the counties to learn about their priority healthcare/housing projects and identify opportunities for pilot projects that support the work of the system integration project teams. There is nearly consensus on a list of major work areas.

Training + Technical Assistance

The [request for qualifications](#) seeking to qualify consultants to provide technical assistance and capacity building support for the housing and homeless systems is live as of March 1. If you are aware of consultants, firms, or nonprofit service providers who may be interested in applying to provide those services, please share the flyer included in your packet. There are two information sessions scheduled, register at the follow links: [March 7](#) and [March 13](#), both are virtual from 11:00 a.m. to 12:00 p.m.

The Regional Capacity team is also excited to announce three job openings: two program managers of which one will work on the training side and the other on the technical assistance side, as well as a program coordinator that will move between the programs. The [jobs](#) will be available to view by March 11.

Employee Recruitment and Retention

Homebase reconvened the Stakeholder Workgroup on February 15th. Homebase continues to engage staff from the counties, service providers, and Metro to inform recommendation development.

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

EXISTING REGIONAL PROGRAMS AND COORDINATION EFFORTS

People housed through the RLRA program as of December 31, 2023: 3,697



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>

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

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

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

Regional Point-in-Time Count: In January 2023, the counties conducted the first-ever fully combined regional Point-in-Time Count. This tri-county coordinated effort included creating a shared methodology and analysis, a centralized command structure, and unified logistics around the recruitment and deployment of volunteers. As a result of the combined Count, analyses include regional trends in unsheltered homelessness, sheltered homelessness, and system improvements made possible by regional investments in SHS.

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

Regional Request for Program Qualifications: This program year also included a Regional Request for Programmatic Qualifications to procure new and diverse organizations as partners for service provision. Tri-county partners worked to ensure broad engagement and technical assistance to support the full participation of new and emerging organizations, especially culturally

specific service providers. 60 applications were qualified to create a broad network of 167 tri-county pre-qualified service providers with diverse expertise and geographic representation.

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

TRI-COUNTY PLANNING BODY GOAL AND RECOMMENDATION LANGUAGE

May 10th, 2023

COORDINATED ENTRY

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

REGIONAL LANDLORD RECRUITMENT

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

HEALTHCARE SYSTEM ALIGNMENT

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

TRAINING

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

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

TECHNICAL ASSISTANCE

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

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

EMPLOYEE RECRUITMENT AND RETENTION

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

Recommendations: Map current wage and benefit conditions.

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

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

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

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

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



Supportive Housing Services Oversight Committee Meeting Summary

Meeting:	Supportive Housing Services (SHS) Oversight Committee Meeting
Date:	January 29, 2024
Time:	9:30 a.m. to 12:00 p.m.
Place:	Virtual meeting (Zoom)
Purpose:	Discussion of Population A/B allocation; discussion of recommendations for FY23 annual regional report; and review of second draft of FY23 annual regional report.

Member attendees

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

Absent members

Jenny Lee (she/her)

Elected delegates

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

Absent elected delegates

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

Metro

Finn Budd (they/them), Yesenia Delgado (she/her), Liam Frost (he/him), Breanna Hudson (she/her), Patricia Rojas (she/her)

Kearns & West Facilitator

Ben Duncan (he/him)

Welcome and Introductions

Co-chair Susan Emmons introduced herself and reflected on the Committee's work putting together the first annual report and reaching consensus on recommendations. She shared that last year's recommendations were in the meeting packet and asked the Committee to consider if there are any new recommendations, any that still need to be continued, and any that can be dropped.

Co-chair Mandrill Taylor introduced himself and reflected that through the audit and feedback received, the Committee has made progress, but there are still areas that demand focus, attention, and strategic thinking. He encouraged the Committee to bring forward insights, questions, and creative thinking to refine recommendations.

Patricia Rojas, Metro, introduced herself, welcomed new Committee members, and thanked current and previous Committee members for their work. She shared that two new Metro staff members started this morning, Hunter Belgard as Regional Housing Data Lead and Cole Merkel as Regional Capacity Manager part of the Technical Assistance and Capacity Team.



Supportive Housing Services Oversight Committee Meeting Summary

Yesenia Delgado, Metro, introduced herself as the Supportive Housing Services (SHS) Manager at Metro and shared that on January 18th Metro Council approved the new Committee appointments.

Ben Duncan, Kearns & West, introduced himself as a neutral third-party facilitator, facilitated introductions between SHS Oversight Members, and reviewed the meeting agenda and objectives.

Jim Bane, Mitch Chilcott, and Cara Hash introduced themselves as new Committee members.

Co-chair Susan Emmons reviewed the meeting summary approval process for new members.

The Committee approved the January 8th SHS Oversight Committee Meeting Summary. Jim Bane, Cara Hash, and Carter MacNichol abstained.

Conflict of Interest Declaration

Becky Wilkinson declared a conflict of interest as she manages a program that receives SHS funding and that she is a part of the Homeless Solution Coalition of Clackamas County.

Carter MacNichol declared a conflict of interest as he is on the Board of Transition Projects which receives SHS funding.

Dan Fowler declared a conflict of interest as he is a part of the Homeless Solution Coalition of Clackamas County which receives SHS funding.

Public Comment

Tom Cusack provided written public comment.

Carter MacNichol reflected that the Committee asked for a response to a previous public comment received from Tom Cusack in August or September and asked what the status was of the response.

Breanna Hudson, Metro, replied that a response was included in the October meeting packet and would be sent to committee as a part of the final meeting packet email.

Discussion: Population A/B Allocation Memo

Yesenia Delgado stated that counties are required to report allocations by Population A and B and oversight of these allocations is a critical responsibility for the Committee. She noted that the meeting packet included the allocation memo by the counties and Metro's analysis. She elaborated that this is the first time Metro received this report and each county used different data methodologies and assumptions. She reflected that due to these differences, Metro cannot provide a regional roll-up or takeaways. She shared that Metro would guide methodology development for counties, and next year's annual report will have consistent data. She recommended not including the allocation numbers in the regional report and including a statement that the numbers were received and that Metro is working to strengthen methodology.

Mike Savara shared his excitement for Hunter Belgard joining Metro and noted that aligning services provided and money spent is difficult. He reflected this is a data system problem as the Homeless Management Information System (HMIS) is primarily used to track service transactions, not money spent. He stated that he has been working on this at the state level to think through approaches for this problem.

Supportive Housing Services Oversight Committee Meeting Summary

Dan Fowler appreciated Mike Savara's comments and asked if Metro anticipated that the counties would have different reporting structures. He reflected that he would be uncomfortable omitting the numbers in the report, and said their job is to put information out there whether it is good or bad.

Patricia Rojas replied that they did anticipate some level of differences between the counties, but they didn't have a way of understanding how different they were. She stated that they have made significant progress towards some regional alignment around the program and demographic reporting, but in receiving the Population A and B allocations, Metro now understands what the differences are. She suggested including the numbers in an addendum as including the numbers in the report could cause confusion as they can't be compared to each other. She suggested including language that Metro received a report and based on discrepancies, they cannot make any conclusions on the spending of Population A and B at the regional level. She added that they want to be transparent and share how they are fixing this, which is connected to the Committee's recommendations for improved financial reporting.

Cater MacNichol shared that he doesn't feel comfortable in hiding the numbers, like Dan Fowler. He shared he understands why it is hard to create regional numbers, but reflected that regional numbers are the sum of the counties, and they have the counties' numbers. He suggested including the numbers and being clear about what the numbers are. He stated that to not include the numbers is disingenuous and not transparent.

Patricia Rojas replied that transparency in the report is always an assumption and that Metro will name and share it, but wanted to consider how to approach it to ensure people can use the numbers in the report. She stated that Metro will support whatever the Committee decides and reflected that everything in the regional report is a regional analysis, and Metro cannot give an analysis for Population A and B.

Dan Fowler stated that the overall impression should be that the public sees investments in Populations A and B and that the numbers are a reporting issue, not a caring issue.

Discussion: Recommendations

Ben Duncan shared that Metro has developed a progress chart for the Committee's recommendations. He stated that the Committee will work through the recommendations to determine if any recommendations are complete, if any need to be clearer, and if there are any new recommendations. He reflected that the Committee would utilize a Jamboard and then walk through each recommendation to identify key themes. He elaborated that the February 12th meeting would be an additional opportunity to refine the recommendations.

Yesenia Delgado clarified that the recommendations were established in May 2023, so Metro, in conjunction with the counties, has only been working on them for about six months. She stated that some recommendations include long-term approaches which will take time. She noted that no recommendations are fully completed and encouraged the Committee to move all the current recommendations forward in the next year.

Breanna Hudson shared the Jamboard which is available in the January 29th final meeting packet.

The Committee took 5 minutes for individual Jamboard work.

Supportive Housing Services Oversight Committee Meeting Summary

Category 1: Regional Community Strategy

Becky Wilkinson added 'hold listening sessions with community partners to learn about successes and challenges' about the 'expand category to include community engagement' sticky note. She stated that she added that note before she learned about the capacity manager role at Metro which would fulfill receiving feedback from community partners.

Patricia Rojas replied that the role is one avenue for receiving feedback, and that county partners are an additional way to receive that feedback.

Ben Duncan asked if seeing this level of detail in refining recommendations is helpful.

Patricia Rojas replied that the Committee should think about what change they want to see and focus more on the shift rather than the tactic in the recommendations. She reflected that Metro staff will look at the recommendations and identify tactics.

Susan Emmons reflected that what the Committee has heard is there is great information on the website, but their neighbors and friends aren't going to websites to receive information. She stated that people see this crisis through how many tents are in the street. She emphasized that there is good work being done that needs to be shared with the public, and recommended sticking with the recommendation.

Patricia Rojas clarified that none of the recommendations have been achieved and they are all ongoing bodies of work, but that it is important to understand the progress made to date.

Dr. Mandrill Taylor shared that he created the 'expand category to include community engagement,' and 'create a long-term community engagement plan' sticky notes. He reflected that the goal of the communication strategy was to prevent misinformation and build public trust and civic engagement. He reflected that the communication so far has been one-way, and suggested explicitly including engagement so communication would be two-way.

Dan Fowler said he wants the communication strategy to lead with accurate information and not react to inaccurate information.

Jeremiah Rigsby appreciated the nature of the community engagement comments. He asked for more clarity on what parts of community engagement would need to be created from scratch. He reflected that engagement is broad and hard to track. He asked for clarity on what the Committee is specifically trying to get out of engagement, and if the recommendation would be guidance for Metro, the Counties, or service providers.

Patricia Rojas replied that Metro is charged with coordinating and leading work. She reflected that different parts of the work are happening in a variety of places and that the team is working to better report and track progress on the overarching goal.

Jeremiah Rigsby asked if the Committee was trying to make a recommendation of where community engagement needs to go, rather than an analysis of engagement.

Ben Duncan reflected that there are two parts: one being how the Committee monitors engagement and two being what exactly the engagement tactics are.

Jeremiah Rigsby noted that the Committee should be as open and transparent as possible. He reflected that community feedback is good intel on to how best address issues arising in the community. He reflected that the community is broad and Metro staff have limited bandwidth so it's important to have clarity on where they are receiving feedback and how they are responding to it.

Supportive Housing Services Oversight Committee Meeting Summary

Becky Wilkinson reflected that the Committee needs to put out accurate information, which includes getting feedback from folks.

Carter MacNichol agreed with what had been said and was concerned about the pace of rolling the communication strategy out and the sense of urgency.

Patricia Rojas replied that Metro shares a sense of urgency and that a comprehensive campaign is a lot of work which takes time. She reflected that Israel Bayer, Metro, has started this work in the summer and if the goal is to provide clarity to the community, that is happening already. She underscored that multiple lanes are all advancing the goal. She reflected that some earlier comments mentioned community input and accurate reporting that reflects what the public sees. She noted that there are a lot of lanes where that is underway with technical assistance and that while they are formalizing the campaign, they aren't waiting to begin work.

Felicita Monteblanco agreed with what had been said and appreciated Patricia's comments. She shared it's important for the public to be informed and to understand the complexity of homelessness to increase compassion and empathy. She reflected that if they aren't extremely proactive with accurate information, they will have to combat an inaccurate narrative.

Category 2: Budgeting/Financial Reporting and Expectations

Co-chair Dr. Mandrill Taylor stated that the current recommendation reads more like an operational tip rather than a strategic direction for financial transparency and that reporting and expectations should address larger concerns with financial reporting and data. He suggested that cross-county collaboration could resolve the Category 5 overlap.

Co-chair Susan Emmons shared that she still finds the quarterly reports cumbersome to review and suggested including an executive summary.

Patricia Rojas agreed, and the current solution is to have high-level slides in the presentation. She stated that Metro is happy to provide a written summary if that feels better.

Felicita Monteblanco asked if the audience for the reports is the Committee or the average person, and noted that if the audience is the average person, the reports should be done differently.

Carter MacNichol reflected that the Committee has received good information on how tax collections are going well but hasn't received any information on challenges.

Category 3: Workforce Issues – Work Plan and Timeline

Dr. Mandrill Taylor recommended adding a needs assessment and framework for regular monitoring and evaluation to the current recommendation.

Susan Emmons struggled with the fact that counties are in different starting places for what they are able to pay workers and increase wages and asked how to address that in a regional report. She noted that the Tri-County Planning Body (TCPB) is also working on this and asked if there is a role for the Committee to do this work in a parallel process.

Liam Frost, Metro, replied that the Committee has a role to play in identifying challenges. He stated that the TCPB is a policy deliberation body and that the Committee would identify

Supportive Housing Services Oversight Committee Meeting Summary

challenges to share with the TCPB to develop solutions. He shared that a consultant will be reporting back to the TCPB on their findings, and once the TCPB proposes a plan, the Committee will review and approve it.

Patricia Rojas added that the Committee recommendations go to Metro Council to indicate priorities.

Carter MacNichol stated that he didn't see approval of the TCPB's plan in their charge.

Patricia Rojas, Metro, replied that it is in the SHS work plan and the auditor has noted that the charter is not reflective of all responsibilities.

Category 3: Workforce Issues – Feasibility and Design of Capacity Building Investments

Felicita Monteblanco stated that continued focus is needed here, and this is a strong opportunity for regional work. She asked what it would take to get to multi-year capacity building and reflected that counties may need to change how they do their work and have nonprofits communicate what they need.

Co-chair Susan Emmons reflected that last year the committee struggled with the question of how money is getting out the door and noted that fiscal staff are risk averse. She stated that SHS funds were designed to be flexible, and the government needs to show up differently. She asked how the counties can utilize a flexible approach and reflected that Multnomah County's work with United Way could have been a multi-year approach, but they have to spend the funds within six months.

Carter MacNichol stated that this work seems to currently be limited to small, emerging, and culturally specific providers, but it should be broader than that.

Yesenia Delgado replied that they are meeting with the counties to discuss the recommendation and they are looking at all providers for this work and are not limiting the opportunity.

Category 3: Workforce Issues - Wage Equity

The Committee did not discuss this board.

Category 4: Program Expansion

Dr. Mandrill Taylor reflected that the recommendation is well drafted and that there is a current media focus on homeless youth. He stated that there has been an underutilization of behavioral health service integration which needs to be resolved. He suggested Metro should provide guidance and regional oversight to ensure the integration of behavioral health and other services such as job training.

Patricia Rojas responded that Metro could do better in communicating about this recommendation and noted that the TCPB has outlined a goal for behavioral health integration and that the Committee's recommendation is being addressed in a variety of areas, including tracking and reporting and launching a Permanent Supportive Housing (PSH) team.

Supportive Housing Services Oversight Committee Meeting Summary

Dan Fowler asked if they are restricted to only giving funding to the counties and if there was a health system that had a good structure, could they be given funds.

Patricia Rojas replied that per the Intergovernmental Agreements (IGAs), Metro provides funding to counties for the dedicated percentages. She noted that Counties can subcontract and have partnerships with other organizations and that partnerships are emerging. She added that Metro's funding is restricted to administration.

Category 5: Data, Reporting and Evaluation

Metro Councilor Christine Lewis shared that it would be helpful to have direct access to HMIS data for the Council to do a regional evaluation as this is a large body of work that's risen to a political level and advice from the Committee would be helpful.

Ben Duncan asked if that would require an intergovernmental data agreement.

Councilor Lewis replied yes, there would be an agreement and an IGA.

Patricia Rojas added that Metro and the counties are in the middle of a data-sharing agreement and are determining what the most effective way to share information would be. She shared that Hunter Belgard could speak more to the data.

Susan Emmons stated that Hunter Belgard could join the February 12th meeting to speak more about data due to time constraints.

Dan Fowler shared that there are early discussions among law enforcement at the municipal level to help the homeless community avoid jail time, including officer training.

Ben Duncan reflected that Committee members can add more to the Jamboard after the meeting and everything on the board along with the conversation today would be refined in the February 12th meeting.

Discussion: Second Draft of the Annual Report

Kris Smock, Kristina Smock Consulting, introduced herself and stated that the Committee has until February 9th to provide feedback on the second draft of the report. She reflected the revised version includes revisions to tone and content. She thanked Carter for sharing his edits via email.

Carter MacNichol stated that he noticed that the word 'ensure' appeared 91 times in the draft and reflected that he is not sure that the Committee can ensure success due to limited authority. He recommended replacing 'ensure' with softer language to match the Committee's authority.

Dr. Madrill Taylor suggested using 'to better ensure.'

Susan Emmons shared that February 12th's meeting is a work session and they won't be voting on anything until the following meeting.

Mike Savara stated that it is best practice to share the comparison of a percentage when listing a percentage, for example, if Multnomah County served X percentage of a race, share the context of that within the homeless or general population.

Supportive Housing Services Oversight Committee Meeting Summary

Kris Smock replied that it is a great recommendation, and noted that the comparisons can be complicated, so she will look at how to show that in a meaningful way.

Ben Duncan stated that there is currently language in the report that references Population A and B, and reflected that the earlier conversation on those numbers wasn't conclusive and hoped to get clarity on that at the February 12th meeting.

Carter MacNichol stated he wouldn't be at the February 12th meeting and asked if he should email Kris Smock his opinion on that.

Kris Smock replied yes, to email her with any recommendations or updates to language.

Patricia Rojas responded that she heard his recommendation to incorporate it into the report and feels comfortable including his voice and position in the conversation.

Ben Duncan stated that if Committee members hadn't expressed their opinion and wouldn't be at the February 12th meeting to share their Population A and B inclusion insights with Kris Smock.

Next Steps

Susan Emmons, Mandrill Taylor, and Patricia Rojas provided closing remarks.

Ben shared that the next steps include:

- Next Meeting: February 12, 9:30 am-12 pm
 - Work session
 - Discuss Population A and B numbers.
 - Hunter Belgard to speak more about data.
- Committee members to email Kris Smock their opinions on including the Population A and B numbers if they won't be able to attend the February 12th meeting.
- Committee members to email Kris Smock feedback on the second draft of the report by February 9th.

Adjourn

Adjourned at 12:00 pm.

The following materials were received
during the meeting.



Metro

Meeting will start at 4:00pm

Metro Regional Supportive Housing Services

Tri-County Planning Body | March 13th, 2024



Metro

Welcome and Opening Remarks

Agenda

4:00pm Welcome and Introductions

4:15pm Public Comment

4:20pm HMIS Strategic Sourcing Analysis Update – Multnomah County

5:05pm Regional Landlord Recruitment and Retention Implementation Plan

5:55pm Closing and Next Steps

6:00pm Adjourn



Metro

Public Comment

HMIS Technology Strategic Sourcing Analysis

Recommendations and Final Report Executive Summary

February 2024

Engagement #: E000653 | Version 2



Gartner partnered with Multnomah County IT to conduct a Strategic Sourcing Analysis of the Tri-County HMIS Implementation

Context:

The Tri-County's current Homeless Management Information System (HMIS) was implemented in 2006 with the primary purpose of data collection for HUD reporting and administration. Since that time, the homelessness response system has changed dramatically, including changes to the overall homeless services landscape, regionalization of services, and recent State and Regional investments in Housing Services that will advance the system over the next 7-10 years.

Project Goal and Objectives:

- Establish a **comprehensive understanding** of the Tri-County HMIS **current state** and **future state vision**.
- Identify the **business capabilities** required in the future state vision.
- **Identify gaps** between the current HMIS usage and the future-state vision for the HMIS.
- Provide **insights** into the current **market** of HMIS products and solutions available.
- Provide **recommendations** and a final report to guide the Tri-County area toward achieving their HMIS vision.

Findings from provider, participant, program staff, system administrators, IT, County, and Regional Leadership formed the foundation of this HMIS analysis.

Conducted **20+ stakeholder interviews** and reviewed **documentation** to inform a **Current State Summary** and **Future State Vision** for the Tri-County HMIS.

Developed a **Business Capability Model (BCM)** for the Tri-County homelessness response system's **needs for the HMIS**. Completed a **Gap Analysis** identifying which of the defined capabilities are performed within the HMIS.

Structured a **Market Scan Framework** based on the BCM and Vision to apply against potential HMIS vendors. Performed a **Market Scan** analyzing the **top five best-fit HMIS solutions** based on the Market Scan Framework.

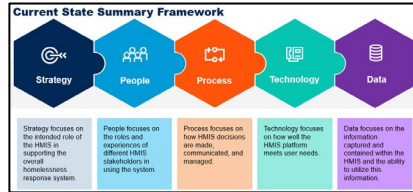
Identified **key project findings about the Tri-County HMIS** and its support system. Crafted **Recommendations** and a **roadmap** to address key findings as part of a **Final Report**.

Step 1: Understand

Step 2: Identify

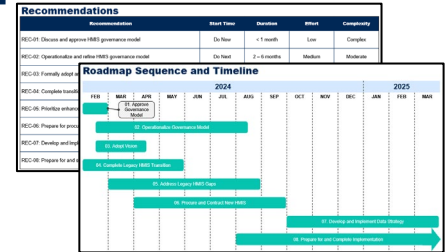
Step 3: Research

Step 4: Analyze



Vendor Fit

Criteria	Vendors
	ADSVTECH, Bitfocus, Bonterra, eccovis, Wellby
OVERALL	ADSVTECH, Bitfocus, Bonterra, eccovis, Wellby
Functional Needs	ADSVTECH, Bitfocus, Bonterra, eccovis, Wellby
Technical Needs	ADSVTECH, Bitfocus, Bonterra, eccovis, Wellby
Vendor / Product Alignment	ADSVTECH, Bitfocus, Bonterra, eccovis, Wellby



Stakeholders consistently envision an HMIS that supports all the care delivery needs of a modern homelessness response system.



Facilitate regional strategies and data standardization across the homelessness response system



Enable the goals of each county throughout the Tri-County area



Enable equitable access for people seeking care



Provide an effective tool to support people providing care



Provide a consistent tool for standardized data collection and analysis



Facilitate cooperation within and across systems of care



Provide easy access to the information needed to make strategic decisions



Ensure compliance with HUD and other reporting requirements

The Legacy HMIS cannot fully support the expanded HMIS vision. The HMIS impacts the homelessness response system's effectiveness and limits its insights.

Key Takeaways

1

The entire Tri-County regional homelessness response system relies on the HMIS, a **siload, outdated**, compliance-focused platform with **poor quality data** as its single source of insight.

2

The **HMIS hinders the Tri-County** area's ability to effectively demonstrate the **impact of funding** being spent, measure the **effectiveness of housing** interventions, **ensure equitable care**, and **efficiently meet compliance reporting** requirements.

3

The HMIS is **poorly designed** for current needs – users are **actively working around and against the system**, creating **security, data quality, and client care issues**.

4

Functional and technical limitations of the legacy HMIS hamper the ability of the Tri-County homelessness response system to achieve its vision for the HMIS as a tool that supports care delivery.

Few business capabilities are done exclusively in the HMIS, and many are not done inside the current HMIS at all.

The HMIS does not fully support many essential business capabilities, dramatically **increasing the efforts required to complete them** and the **burden placed on providers and county staff**. These capabilities include:

Outreach & Engagement

- Population & Service Mapping

Coordinated Entry

- Housing Prioritization

Housing Management

- Housing Voucher Management

Care Coordination

- Case Conferencing
- Care Transition Management
- Communication Support

Participant Management

- Grievance Tracking

Provider Management

- Provider Data Sharing Agreements
- Provider Performance Management

Participant Self-Service

- Information Access & Viewing
- Information Submission & Updates

Fund Management

- Fund Profile Management

Reporting & Analytics

- Dashboarding
- Data Analysis & Visualization

Several of these capabilities are critical to achieving the expanded HMIS Vision.

Technical limitations of the current HMIS restrict the ability to perform many business capabilities within the current solution.

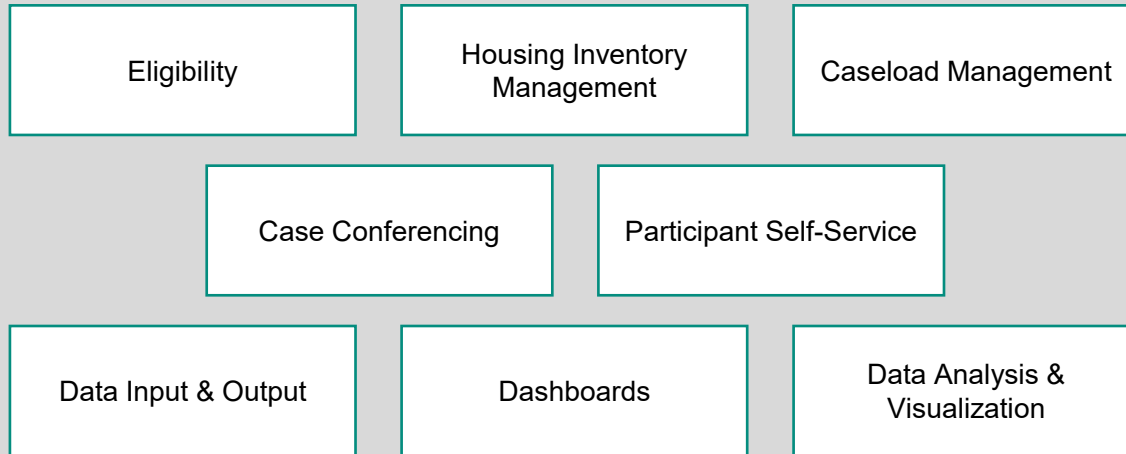
The current HMIS does not support:

- 1 **Mobile compatibility** for access in the field
- 2 **Geospatial data** for logging services
- 3 **File imports** for easily entering bulk data
- 4 **Integrations** with other solutions for efficiently sharing information
- 5 **Data warehousing** for collecting data from multiple systems of care
- 6 **Customized analytics and dashboarding** for drawing insights

As a result of these limitations, the current HMIS solution **hampers the Tri-Counties' ability to work towards their collective vision for the HMIS.**

Improvements can be made to the legacy solution to help address some of the gaps.

Key capabilities that re-configuring the system may improve:



Key pain points to address with the legacy vendor:

- Lack of **data visibility**
- Resolution of **duplicate records**
- Minimizing creation of **duplicate records**

The Tri-Counties will need to determine the **appropriate level of resources** to invest in the legacy solution given that it **cannot meet all the Counties' desired capabilities**.

There are solutions in the market that are likely to better meet the Tri-Counties' HMIS vision and needs.

Key Takeaways

1

There are **two primary HMIS vendors** that service the 15 Continua of Care (CoCs) with the largest homeless counts. These vendors are the most likely to meet the Tri-Counties' HMIS vision and needs.



























2

There are additional vendors that **may also meet the Tri-Counties' needs** but are less experienced with complex CoCs or are less HMIS-focused.

3

These solutions all offer significant functional and technical **benefits over the Tri-Counties' legacy HMIS solution.**

Other large, complex Continua of Care use primarily **two vendor solutions** that are **better aligned** to the Tri-Counties' HMIS needs.

Criteria	Vendors				
	 ADSYTECH	 Bitfocus	 Bonterra	 eccovia	 WellSky 
OVERALL					
Functional Needs					
Technical Needs					
Vendor / Product Alignment					

Other than the Tri-County implementation, all HMIS for the 15 HUD-defined Continua of Care with the largest homeless counts as of 2023 are provided by Bitfocus or Eccovia or have a custom local solution.

 Denotes Tri-County legacy HMIS vendor

Implementation of a new HMIS will be required to provide the Tri-Counties with the desired functional and technical capabilities to achieve the expanded HMIS vision.

Key Takeaways

1

The Tri-Counties will need to **prioritize the business and technical capabilities** required for the HMIS and **determine the best procurement strategy** to acquire the solution that best supports and enables the HMIS Future State Vision.

2

The HMIS procurement will **require business process reengineering** to understand how to operationalize the expanded HMIS vision and ensure the **effectiveness of the new HMIS**.

3

Identifying and addressing participant, provider organization, and staff needs **in advance of implementation** will be critical for success.

Identified recommendations position the Tri-County to achieve its expanded HMIS vision.

The recommendations on the following pages ensure:

1

The right stakeholder representation is involved in HMIS decision-making at the right levels

2

All short and long-term HMIS decisions are focused toward achieving the same vision

3

Limited investments improve use of the legacy HMIS in the short-term

4

A fully capable HMIS solution enables the HMIS vision in the long-term

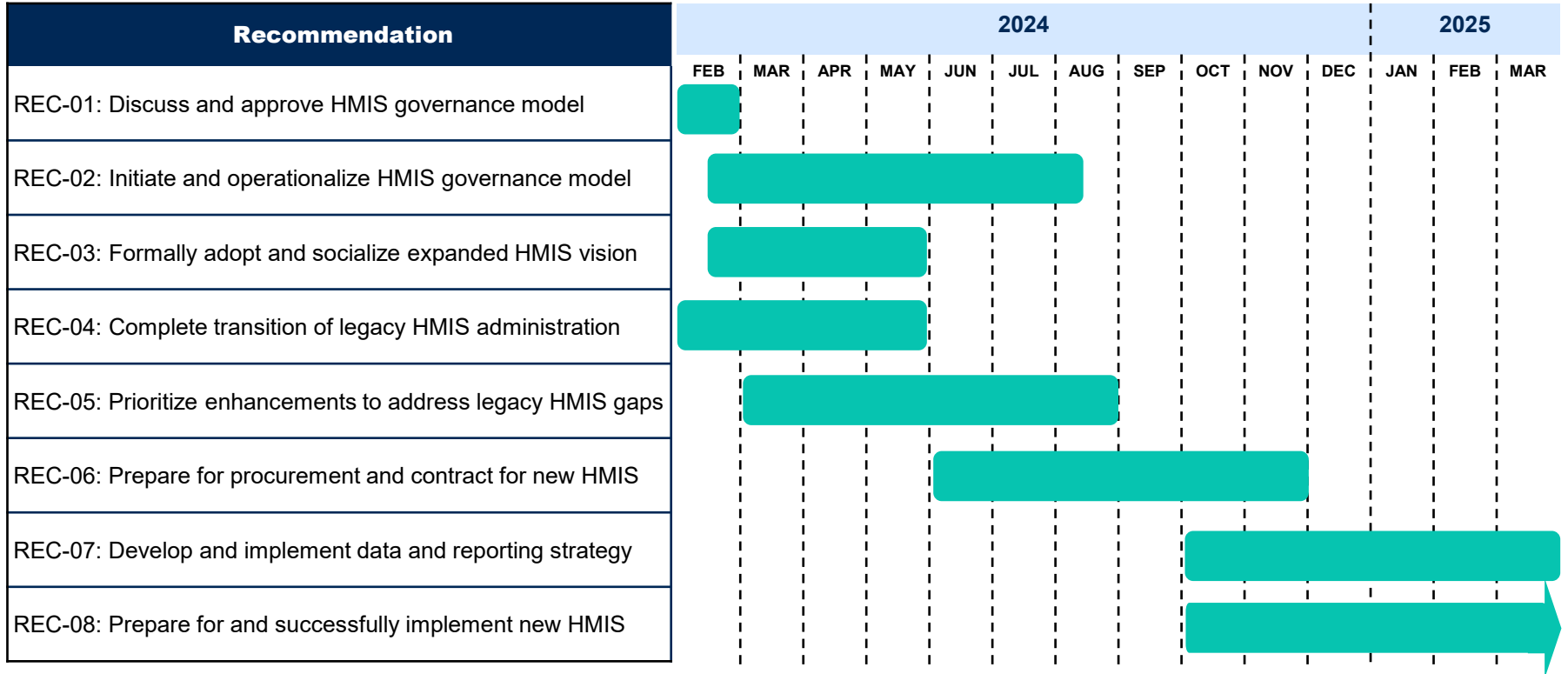
5

A comprehensive strategy ensures the value of the HMIS data to the Tri-County homelessness response system

Gartner has identified 8 recommendations to best position the Tri-Counties to achieve its expanded HMIS Vision.

Recommendation	Urgency	Effort	Complexity
REC-01: Discuss and approve HMIS governance model	Do Now	Low	Complex
REC-02: Initiate and operationalize HMIS governance model	Do Next	Medium	Moderate
REC-03: Formally adopt and socialize expanded HMIS vision	Do Next	Low	Moderate
REC-04: Complete transition of legacy HMIS administration	Do Soon	Low	Moderate
REC-05: Prioritize enhancements to address legacy HMIS gaps	Do Soon	Medium	Moderate
REC-06: Prepare for procurement and contract for new HMIS	Do Soon	Medium	Complex
REC-07: Develop and implement data and reporting strategy	Do When Ready	High	Complex
REC-08: Prepare for and successfully implement new HMIS	Do When Ready	High	Complex

Potential Timeline for Recommended Activities



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Metro

Landlord Recruitment Implementation Plan

Drafted by Metro and the Counties

Racial Equity Considerations

- Leading with racial equity and racial justice is a guiding principle to the implementation of the Supportive Housing Services Measure, both in the development and execution of the work
- Consideration of increase in housing choice, affirmatively furthering fair housing, impact on historically oppressed communities, and reduce disparities among historically marginalized groups
- Convening an equity staff work group

1

Communication and Education Plan

- Metro, with input from Counties, will hire a consultant to plan and lead a regional campaign to recruit and educate landlords.
 - Intentional focus on reaching Black, Brown and Indigenous landlords and landlords from non-dominant cultures and communities.
- Metro will create a webpage with voucher types and incentives to help educate landlords.
- **Anticipated Cost:** \$50,000 – 150,000
- **Anticipated Metrics/timeline:** Webpage live by **Fall 2024**. The campaign will reach **200** unique landlords, and begin by **June 2025**.

2

Align financial incentives

- County and Metro staff will research and recommend whether to change existing landlord financial incentives (e.g. RMP), and/or to expand them to more program types.
- Supported by the communications contractor, Counties will develop materials about landlord financial incentives to train case managers on existing options.
- **Anticipated Cost:** \$100,000
- **Anticipated Metrics/timeline:** Estimate the cost to expand incentives and create materials on existing incentives by **Winter 2024**

3

Tracking and access to unit inventory

- Multnomah County will pilot a unit acquisition and tracking program with Housing Connector for **FY24-25**
- Counties will study the pilot to consider expanding it regionally.
- **Anticipated Cost:** \$810,000
- **Anticipated Metrics/timeline:** Pilot contract will begin **FY25**. Recruit **30** property partners, house **72** households, list **230** property units, **70%** of units will be below Fair Market Rent (FMR)

4

Prioritize quality problem-solving services

- Clackamas will pilot a 24/7 landlord hotline to take strain off case managers and add a support layer for landlords.
 - Hotline staff will navigate landlords to existing supports and services (e.g. RMP, case manager, incentives, landlord-tenant law, fair housing law).
- **Anticipated Cost:** \$500,000
- **Anticipated timeline:** hotline online by **Winter 2025**.

5 Investigate needs for property management

- Metro, with input from Counties, will hire a consultant to study mission-driven property management, and provide strategies to expand it.
- Metro will convene workgroup with Counties to consider implementing the strategies.
- **Anticipated Cost:** \$50,000 – 100,000
- **Anticipated Metrics/timeline:** By **Spring 2025**, identify one or more strategies to implement.

Landlord Recruitment and Retention Implementation Plan

\$7,810,000 - \$8,060,000

Strategy	Budget
#1: Communication and education plan	\$50-150K
#2: Align financial incentives	\$100K
#3: Tracking and access to unit inventory	\$810K
#4: Prioritize quality problem-solving services	\$500K
#5: Investigate needs for property management	\$50-100k
Existing work	
Risk Mitigation Program	\$6,000,000
Support staffing for County landlord liaison	\$300-400K
Total	\$7,810,000 - \$8,060,000



Metro

Closing and Next Steps

Next Steps

- Post approved meeting summary online
- Next meeting: April 10, 2024

Meeting Adjourned



Zoom Chat

01:28:52 Metro Housing Department: Hi everyone, thanks for joining this afternoon. Like Ben announced, please ensure your chat is set to "Everyone" instead of "hosts and panelists." Thanks.

02:23:41 Steve Rudman: Totally agree. great report and I'm optimistic. Way better options than current HMIS. Could be a great tool for system alignment

02:24:32 Ben Duncan (Kearns & West): Mike, Sahaan, Yvette then we will move on.

02:27:40 Abby Ahern-she/her: Yes, agree with Dan on BfZ explanation

02:28:41 Christine Lewis: Do we have a vote to approve funding for this project?

02:34:54 Abby Ahern-she/her: cant hear

02:36:26 Abby Ahern-she/her: cant hear the chari

02:36:35 Min Chong (Gartner): Thank you for the opportunity to present the results of our analysis.

02:36:54 Metro Housing Department: Thank you for joining, Min. We appreciate your presentation.

02:42:43 Ben Duncan (Kearns & West): Councilor Lewis---missed chat earlier. No vote today, but if/when a future budget ask is developed, this group will weigh in (as it connects to the RIF)

02:47:13 Christine Lewis: Thanks Ben, it was addressed naturally in the conclusion of that item.

02:49:19 Abby Ahern-she/her: microphone

02:54:50 Ben Duncan (Kearns & West): Cristina see your hand. You will be first to speak for roundtable (including if you have a question)

02:55:31 Cristina Palacios:

03:09:41 Steve Rudman: We should get an update on RLRA and the mitigation fund