

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Supportive Housing Services Oversight Committee Meeting
Date: January 9, 2023
Time: 9:30 a.m. to 1:00 p.m.
Place: Virtual meeting ([Zoom](#))
Purpose: Financial update from Metro finance for FY23 and a review of tax collections, collection costs and program admin for FY22; identify committee priorities that will determine the content of the SHS regional annual report.

9:30 a.m.	Welcome and introductions
9:45 a.m.	Conflict of Interest declaration
9:50 a.m.	Public comment
10:00 a.m.	FY23 Financial Update and FY22 Annual Financial Review
10:20 a.m.	Guided discussion: Annual Report Committee Priorities
11:00 a.m.	Break
11:15 a.m.	Guided discussion continued
12:55 p.m.	Next steps
1:00 p.m.	Adjourn

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Повідомлення Metro про заборону дискримінації

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Ogeysiiska takooris la'aanta ee Metro

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

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

إشعار بعدم التمييز من Metro

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

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Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

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

Supportive housing services regional oversight committee

Meeting guidelines

Arrive on time and prepared.

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

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

Listen carefully and keep an open mind.

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

Avoid side conversations.

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

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

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

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

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

Group agreements

We aren't looking for perfection.

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

You are the author of your own story.

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

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

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

We are all learners and teachers.

Expertise isn't privileged over lived experience and wisdom.

Liberation and healing are possible.

Expect non-closure.

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: January 9, 2023
To: Supportive Housing Services Oversight Committee
From: Rachael Lembo, Finance Manager
Subject: FY23 Financial Update

This financial update is designed to provide the information necessary for the SHS Oversight Committee to monitor financial aspects of program administration.

Financial Report

The FY23 financial report through November 2022 is enclosed with this memo.

The first quarter financial reports (July – September) were received by the counties in November and expenses are included in the enclosed financial report. The counties together spent \$14.4 million in quarter one of FY23, a significant increase from the \$5.8 million spent in quarter one of FY22.

	FY23 Annual Program Budget	Q1 Program Expense	% Spent
Multnomah County	107,122,534	8,640,019	8%
Washington County	49,587,320	4,820,787	10%
Clackamas County	28,980,000	989,045	3%
Total	185,689,854	14,449,851	8%

Tax Collection and Disbursement Summary

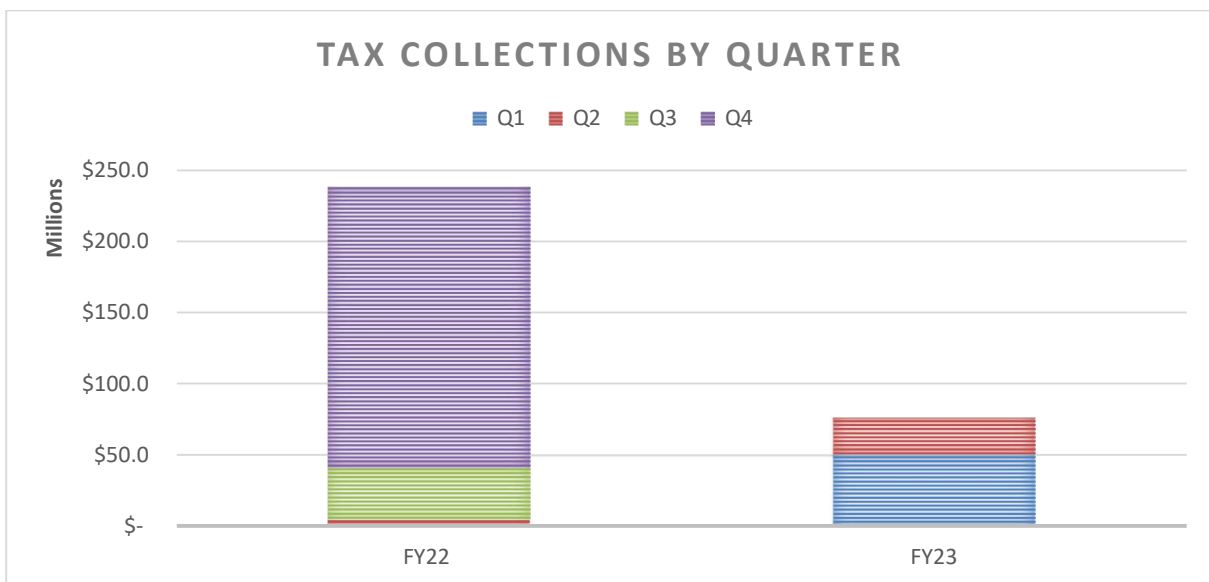
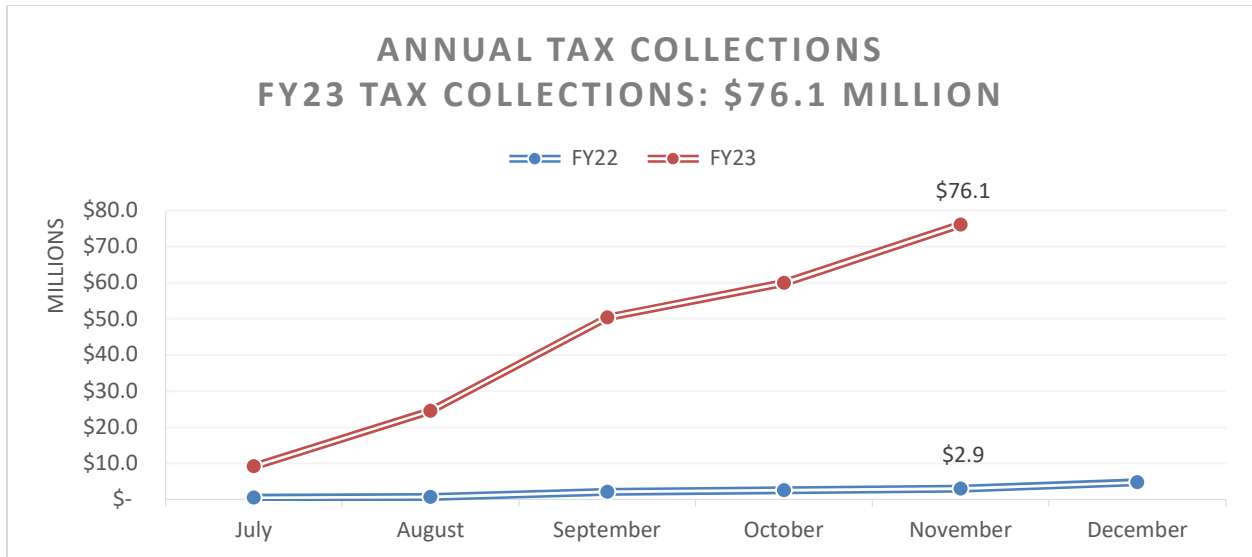
FY23 tax collection and disbursement figures on a cash basis are included below.

Total Tax Collected this FY	\$76,137,934
Total Disbursed to County Partners this FY	\$67,678,316

Tax Collections

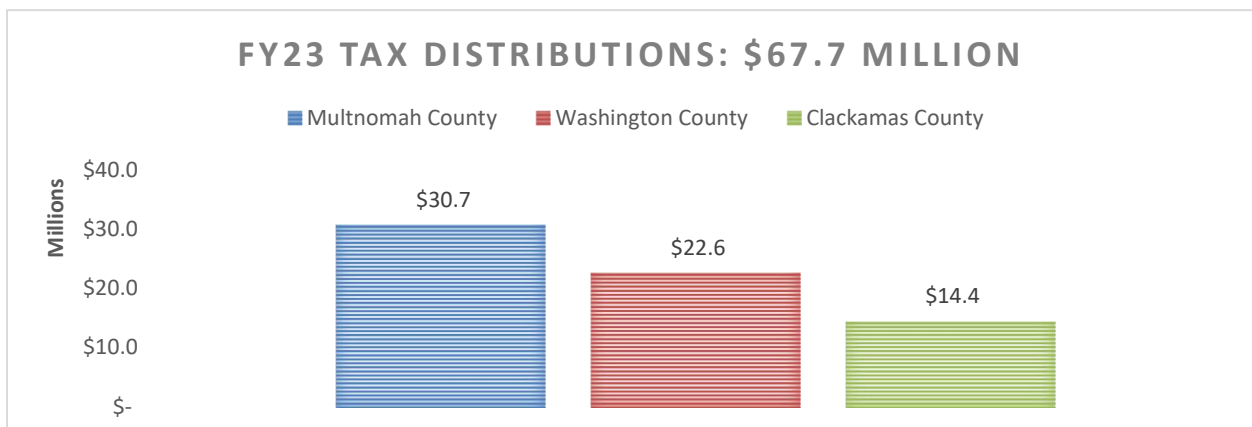
The charts below compare total tax collections in FY23 to FY22. The first chart is different than prior reports – it now shows cumulative tax collections by month. July-November collections in FY23 were \$76 million.

Our tax administrator is continuing to process 2021 returns, and in just a few months will start to receive 2022 returns.



Tax Disbursements

The chart below shows tax disbursements to the county partners in FY23.



Metro Supportive Housing Services Fund

Financial Report

FY22-23, November 2022

	Annual Budget	July-November Actuals	Variance Under / (Over)	% of Budget	Comments
Revenues					
Business Income Tax	112,500,000	28,661,798	83,838,202	25%	
Personal Income Tax	112,500,000	26,605,041	85,894,959	24%	
Interest Earnings	281,250	193,105	88,145	69%	
Total Revenues	225,281,250	55,459,943	169,821,307	25%	
Expenditures					
Personnel Services	1,350,160	306,965	1,043,195	23%	11.1 FTE
Materials and Services	216,196,561	15,839,180	200,357,381	7%	see detail below
Transfers-E	13,861,913	803,698	13,058,216	6%	cost allocation plan, debt service
Total Expenditures	231,408,634	16,949,843	214,458,791	7%	
Contingency	9,265,617	-	9,265,617		
Change in Fund Balance	(15,393,001)	38,510,100	(53,903,101)		
Beginning Fund Balance	15,393,001	177,201,219	(161,808,218)		
Ending Fund Balance	-	215,711,319	(215,711,319)		
Materials and Services detail:					
Tax Collection Costs	14,436,666	1,224,766	13,211,900	8%	
County Partners Expenses*	200,302,355	14,449,851	185,852,504	7%	
Other	1,457,540	164,563	1,292,977	11%	
Materials and Services total	216,196,561	15,839,180	200,357,381	7%	

*County Partners Expenses above is based on county quarterly financial reports, not the amount Metro disbursed to them. Tax collection and disbursement figures on a cash basis are included below.

Total Tax Collected this FY	76,137,934	<i>Reflects tax collections and disbursements (on a cash basis) from July - November 2022 tax collection period.</i>
Total Disbursed to County Partners this FY	67,678,316	

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: January 9, 2023
To: Supportive Housing Services Oversight Committee
From: Rachael Lembo, Finance Manager
Subject: FY22 Annual Financial Review

This report provides an annual review of the financial aspects of tax collection and program administration for FY22.

Financial Report

The final FY22 financial report, July 2021 – June 2022, is enclosed with this memo.

Tax Collection and Disbursement Summary

FY22 tax collection and disbursement figures on a cash basis are included below. This reflects collections as received by our tax administrator, and includes payments to the Counties in July 2022 for collections received in June 2022.

Tax Collection and Disbursement Summary	FY22
Tax collections (April 2021-June 2022)	\$239,469,627
Interest from tax administrator	8,259
Tax collection costs (FY21 and FY22)	(18,967,255)
Net tax collections	220,510,630
Tax administrator reserve	(200,000)
Metro administration	(11,025,532)
Total disbursed to County Partners (July 2021-July 2022)	209,285,099
Multnomah County	94,875,911
Washington County	69,761,700
Clackamas County	44,647,488

Tax revenue as reported on the enclosed financial report is slightly more than tax collected, because it includes an accrual for tax year 2021 collections that were received within 60 days of year-end, per governmental accounting rules.

Tax Implementation and Costs

Supportive Housing Services (SHS) is the first program at Metro to be funded by personal and business income taxes. After Metro Council referral of the ballot measure in February 2020, Metro began planning tax implementation with the effective date of January 2021. Metro selected the City of Portland Revenue Division to administer these taxes, as the City had the experience, the technical capability and a scalable team to allow for tax collection to begin timely, in April 2021.

The implementation of this new tax collection system has gone smoothly, all major rollouts were implemented on time and within budget.

Tax Implementation - One-time Startup Costs

The table below provides details on the specific implementation costs associated with tax collection. These costs are significant as Metro implemented two separate taxes (personal and business), and there was no local personal tax to build from when Metro began (Multnomah County subsequently implemented a local personal tax, which did provide some economy of scale savings for Metro). Implementation work was primarily complete by the end of FY22, however the final rollout was completed in FY23. Metro has not yet received the final billing for the FY23 work, but the table below includes an FY23 forecast to estimate the full cost of implementation.

The most significant cost component below is software. This includes software definition, development, testing, training and support provided by the City of Portland Revenue Division's software vendor. Staffing is fluid on the implementation side, as project work has a natural ramp up and ramp down. City personnel were estimated to be 22 FTE at the height of implementation; the actual FTE peaked at 18.5.

	Budget	FY21 & FY22 Actuals	FY23 Forecast	Forecasted Total	Variance Under / (Over)
<i>One-time Startup Costs</i>	\$23,577,298	\$14,160,576	\$4,237,957	\$18,398,533	\$5,178,765
<i>Personnel</i>	4,343,696	2,144,821	594,917	2,739,738	1,603,958
<i>Software</i>	13,323,457	11,515,150	703,707	12,218,857	1,104,600
<i>Other Materials & Services</i>	1,194,685	500,605	314,677	815,282	379,403
<i>Contingency</i>	4,715,460	-	2,624,656	2,624,656	2,090,804

Tax Implementation - Ongoing Operating Costs

The table below provides details on FY22 ongoing operational costs associated with tax collection.

The most significant cost component below is City personnel, who manage all aspects of administration, including providing customer service to tax filers, collecting estimated tax payments, auditing returns, assessing and collecting the tax, penalties and interest, making refunds, and hearing appeals. City personnel were originally estimated to be 37 FTE, however the current personnel estimate is 34.5 FTE. Hiring occurred throughout FY22, resulting in some budget savings due to vacancies. The City expects to be fully staffed in FY23.

Software costs in FY22 do not include ongoing support costs, as the software was still being implemented. Beginning in FY23 annual software maintenance and support costs are \$2.3 million.

	FY22 Budget	FY22 Actuals	FY22 Variance Under / (Over)
<i>Ongoing Operating Costs</i>	\$7,440,215	\$4,547,486	\$2,892,729
<i>Personnel</i>	4,294,102	2,932,769	1,361,333
<i>Software</i>	1,146,905	1,146,036	869
<i>Other Materials & Services</i>	1,208,798	468,681	740,117
<i>Contingency</i>	790,410	-	790,410

Metro spending

Metro's FY22 administrative and oversight costs were \$2.7 million. This includes:

- \$650k for personnel (4.8 FTE),
- \$180k for materials and services (communications and policy consultant support, meeting facilitation)
- \$1.9 million for cost allocation plan shared services (finance, HR, legal, IT, communications, COO Office/Council)

Metro is allowed up to 5% of net tax collections for administration and oversight, which amounted to \$11.0 million in FY22. This funded FY21 and FY22 costs of \$3.1 million, and the balance was carried forward to FY23. The carryover will ensure there is sufficient funding to continue development of the regional program, including new policy and program work areas identified by the Tri-County Planning Body.

Metro Admin Summary	
Metro administrative allowance	11,025,532
FY21 costs	458,423
FY22 costs	2,686,452
Carryover to FY23	7,880,657

FY22 Financial Summary

Much like our County partners, Metro is still ramping up this new program. Tax implementation, IGA negotiations and formation of the Tri-County Planning Body were major projects in FY22 which are now complete. Metro is now focused on growing its capacity to respond to the needs of this regional program.

Metro Supportive Housing Services Fund

Financial Report

FY21-22, Annual Report

June 2022 (Third Close)

	Annual Budget	July-June Actuals	Variance Under / (Over)	% of Budget	Comments
Revenues					
Business Income Tax	54,468,750	94,724,870	(40,256,120)	174%	
Personal Income Tax	125,812,500	147,925,166	(22,112,666)	118%	
Interest Earnings	-	122,232	(122,232)	N/A	
Total Revenues	180,281,250	242,772,268	(62,491,018)	135%	
Expenditures					
Personnel Services	678,145	651,332	26,813	96%	4.8 FTE
Materials and Services	173,579,301	69,062,929	104,516,372	40%	see detail below
Transfers-E	13,969,051	13,887,495	81,556	99%	cost allocation plan, debt service
Total Expenditures	188,226,497	83,601,756	104,624,741	44%	
Contingency	15,631,983	-	15,631,983		
Change in Fund Balance	(23,577,230)	159,170,512	(182,747,742)		
Beginning Fund Balance	23,577,230	18,030,707	5,546,523		
Ending Fund Balance	-	177,201,219	(177,201,219)		
Materials and Services detail:					
Tax Collection Costs	21,221,228	13,158,904	8,062,324	62%	
County Partners Expenses*	151,314,473	55,722,313	95,592,160	37%	
Other	1,043,600	181,712	861,888	17%	
Materials and Services total	173,579,301	69,062,929	104,516,372	40%	

*County Partners Expenses above is based on county financial reports, not the amount Metro disbursed to them. Tax collection and disbursement figures on a cash basis are included below.

Total Tax Collected this FY	239,469,627	<i>Reflects tax collections disbursements (on a cash basis) that occurred from the start of tax collections in April 2021 through the June 2022 tax collection period.</i>
Total Disbursed to County Partners this FY	209,285,099	

Clackamas County
Metro Staff Annual Report Review

Requirement	Metro Staff Review <i>A checked box indicates requirement has been met. Page numbers reference the annual report.</i>	SHSOC Notes
SECTION 1: COMPLETION OF ANNUAL REPORT TEMPLATE REQUIREMENTS		
A) Executive Summary		
<i>Narrative that summarizes progress and outcomes under the local implementation plan and the program budget for the year</i>	<input checked="" type="checkbox"/> The Executive Summary summarizes overall progress and outcomes, with a narrative that focuses on (a) capacity building to lay the foundation for SHS program implementation; (b) procurements to expand the county's network of housing and homeless services providers, particularly culturally specific providers; (c) stabilization of existing shelter programs; (d) the use of non-SHS resources for eviction prevention and rapid rehousing; and (d) placement of households into permanent supportive housing (PSH). The Executive Summary summarizes the overall program budget for year one of \$10.8 million, explains why it was lower than the LIP projected budget of \$24 million, and summarizes plans for budgeting for year two (p.1-2) .	<input type="checkbox"/>
<i>Annual progress to goals, including narrative of whether you met the goals or not</i>	<input checked="" type="checkbox"/> The Executive Summary highlights progress on year one goals that were met or exceeded despite the county's significantly revised budget. The Executive Summary does not explicitly list the goals that were not met but notes the challenges of establishing a new regional program amid funding instability and a reduced budget (p.1) . Additional details on progress to goals are available in the body of the report and appendix.	<input type="checkbox"/>
<i>Types of programs launched, services provided, by population type (A/B)</i>	<input checked="" type="checkbox"/> The Executive Summary provides a high-level overview of the types of programs launched and services provided in year one (p.1) . Additional details are available in the body of the report and appendix.	<input type="checkbox"/>
B) Investment Areas and Impact/Outcomes		
Reporting on all required regional outcome and equity metrics (section 5.2 of Metro SHS Work Plan):		
<i><u>Data Disaggregation:</u> All data about people/households in this section disaggregated by race/ethnicity, disability status, gender.</i>	<input checked="" type="checkbox"/> All required data on people/households in this section are disaggregated by race/ethnicity, disability status, and gender (except for data fields not reported on, as noted below).	<input type="checkbox"/>
<i><u>Housing Stability:</u> Number of supportive housing units created and total capacity, compared to households in need of supportive housing</i>	<input checked="" type="checkbox"/> All required data are provided (p.23) : <ul style="list-style-type: none"> Units of supportive housing created: 122 units Total capacity of supportive housing: 714 units Households in need of supportive housing: 508 	<input type="checkbox"/>
<i><u>Housing Stability:</u> Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year and outflow</i>	<input checked="" type="checkbox"/> All required data are provided (p.24-25) : <ul style="list-style-type: none"> Households experiencing housing instability: Systemwide unmet need of 2,149 households in HMIS not yet permanently housed Households experiencing homelessness: 500 Households placed into stable housing: 122 	<input type="checkbox"/>
<i><u>Housing Stability:</u> Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing) and</i>	<input checked="" type="checkbox"/> Most required data are provided; in categories where no data are provided there were no SHS-funded services. The narrative includes information on non-SHS funded services in those	<input type="checkbox"/>

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<i>priority population type. Please use the quarterly report template data charts for this metric</i>	<p>categories.</p> <ul style="list-style-type: none"> ▪ Supportive housing placements: 122 households (104 Pop A, 18 Pop B) (p.26-28) ▪ RLRA placements (subset of above): 122 households (104 Pop A, 18 Pop B) (p.28-30) ▪ RRH placements: no data provided (assumed to be zero) ▪ OPH placements: no data provided (assumed to be zero) ▪ Preventions: no data provided (assumed to be zero) ▪ Households served in emergency shelter or transitional housing (not a required reporting element): 149 (127 Pop A, 22 Pop B) (p.32) 	
<i><u>Housing Stability:</u> Housing retention rates</i>	<input type="checkbox"/> Retention data are not available for year one because this metric is measured one year after housing placement.	<input type="checkbox"/>
<i><u>Housing Stability:</u> Length of homelessness and returns to homelessness</i>	<input checked="" type="checkbox"/> All required data are provided (p.31-32) : <ul style="list-style-type: none"> ▪ Average length of time homeless in system: 3.5 years ▪ Returns to homelessness from PSH: 1.2% 	<input type="checkbox"/>
<i><u>Housing Stability:</u> Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice</i>	<input checked="" type="checkbox"/> Data for this measure are provided mostly in narrative form in various parts of the report. <ul style="list-style-type: none"> ▪ Capital investments leveraged: The SHS program leveraged Metro Affordable Housing Bond funding through three projects (p.14) ▪ Other services system funds leveraged: Bridges to Housing Program, Emergency Housing Vouchers (p.7) ▪ Other resources (Federal, State, Local) leveraged: FEMA (\$2.4m), ARPA (\$2.2m), Emergency Solutions Grant (\$0.1m) (p.16-17) 	<input type="checkbox"/>
<i><u>Equitable Service Delivery:</u> Scale of investments made through culturally specific service providers to measure increased capacity over time</i>	<input checked="" type="checkbox"/> All required data are provided (p.13) : <ul style="list-style-type: none"> ▪ Amount of funding to culturally specific services providers: \$527,476 ▪ Other resources designated for culturally specific services providers: The county assisted one of the providers in preparing documentation to receive additional state funding 	<input type="checkbox"/>
<i><u>Equitable Service Delivery:</u> Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages</i>	<input type="checkbox"/> Clackamas County did not collect these data from service providers. The report states that these data will be collected semi-annually starting next year (p.13) .	<input type="checkbox"/>
<i><u>Equitable Service Delivery:</u> Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience</i>	<input type="checkbox"/> Clackamas County did not collect these data from service providers. The report states that these data will be collected semi-annually starting next year (p.13) .	<input type="checkbox"/>
<i><u>Engagement & Decision-making:</u> Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness</i>	<input checked="" type="checkbox"/> The report references data from two committees, the Continuum of Care Steering Committee (CoC) and the Youth Action Board (YAB) (p.13) : <ul style="list-style-type: none"> ▪ % of local advisory committee/board and oversight committee members who identify as BIPOC: 12% CoC, 50% YAB ▪ % of local advisory committee/board and oversight committee members who have lived experience of housing stability or homelessness: 12% CoC, 100% YAB 	<input type="checkbox"/>

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Program year implementation progress data:		
<i>Reporting on investments and activities for Year 1 and achievement data. Disaggregate data that is about people. Include Population A and B breakdown by program type and reporting on specific programs (e.g. RLRA)</i>	<input checked="" type="checkbox"/> The <i>Investment Areas and Impact/Outcomes</i> section of the report (p.3-6) provides a narrative description of the following year one activities and achievements, with disaggregated data, reporting by program type, and Pop A/B breakdown available in Appendix A (p.23-32): <ul style="list-style-type: none"> Placed 122 households in permanent supportive housing (p.3-4) Provided housing navigation services to 95 households (p.5) Provided supportive housing case management to all 122 households placed in PSH (p.5) Approved 202 households for RLRA, 122 of which leased up in year one (p.5) Stabilized two emergency/transitional programs with 100 beds (p.3,6) Built internal and system capacity, expanding program staff from 4 to 13 (p.3) Contracted with three new culturally specific providers to support efforts to address systemic disparities (p.3) 	<input type="checkbox"/>
<i>A brief analysis of how SHS program investments have contributed to the values and goals of the SHS program; include a narrative on cross sector coordination efforts and other investment areas</i>	<input checked="" type="checkbox"/> The report does not explicitly articulate how SHS program investments have contributed to the values and goals of the SHS program, but that information is implicit throughout the report. The report highlights two cross-sector collaborations: a partnership with the county's Behavioral Health Division to fund two mental health positions to support housing case management, and a partnership with the district attorney's office to address barriers to housing. It also references partnerships with other county departments to connect SHS resources with existing programs to expand their impact (p.7).	<input type="checkbox"/>
C) Regional Coordination of Access to Services Between Partner Jurisdictions		
<i>A summary of coordination work across the three counties to date; describe all regional efforts</i>	<input checked="" type="checkbox"/> The <i>Regional Coordination</i> section of the report (p.8) summarizes regional coordination on: <ul style="list-style-type: none"> Developing and implementing the Regional Long-term Rent Assistance program Building a regional service provider network through a tri-county procurement process Establishing regional data systems and standards 	<input type="checkbox"/>
D) Provider Capacity and Expansion		
<i>System baseline information if possible – list of providers under contract with counties before measure</i>	<input checked="" type="checkbox"/> Appendix B lists service providers under contract before SHS (p. 33).	<input type="checkbox"/>
<i>A list of all the service providers under contract with each county that received Program Funds, and the amount of funds received by each contractor</i>	<input checked="" type="checkbox"/> Appendix B lists SHS program service providers under contract in year one by program type, highlighting agencies that are new to the county (p.33). Information on the amount of funds received by each contractor in year one is in Appendix D (p. 37).	<input type="checkbox"/>
<i>Description of how procurement processes were equitable and transparent</i>	<input checked="" type="checkbox"/> The county conducted two sets of procurements, with the second one incorporating strategies to encourage smaller organizations to apply. The procurements promoted equity and transparency by providing pre-proposal meetings where applicants could ask questions and receive feedback, offering debriefings for unsuccessful applicants, and simplifying and streamlining the application process (p.9). Points were awarded to agencies that demonstrated they were culturally specific (p. 11).	<input type="checkbox"/>

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E) Equity Analysis		
<i>Reporting on the success or failure of racial inequity mitigation strategies and steps being taken to improve racial equity outcomes.</i>	<input checked="" type="checkbox"/> The report describes the findings from an updated racial equity analysis that shows increased rates of service participation for several BIPOC populations. The report notes that additional data will be assessed in future years to continue to assess the impact of mitigation strategies, particularly on outcomes (p.10-11) . The report describes the following steps taken in year one to address racial disparities: (a) procurement processes that focused on expanding culturally specific services and resulted in several new contracts with culturally specific providers; (b) a contract for culturally specific technical assistance with Coalition of Communities of Color and Unite Oregon, which resulted in 21 recommendations, many of which have already been acted upon; (c) increased emphasis on racial equity in the Continuum of Care's local funding competition (p.10-13) .	<input type="checkbox"/>
<i>Analysis of disaggregated outcomes data</i>	<input checked="" type="checkbox"/> The report provides a descriptive analysis of disaggregated data from the updated racial equity analysis and suggests the data demonstrate the success of the county's SHS strategies. However, it does not provide a clear articulation of what the data demonstrate about the strategies or how or why some of the data are indicative of success. The primary data that is used to demonstrate success is data showing higher rates of service participation among some BIPOC populations. The report notes the limited outcome data available for SHS participants at this stage in the program and that more analysis will be possible in future years (p.10-11) .	<input type="checkbox"/>
<i>Culturally specific provider expansion strategies and impact</i>	<input checked="" type="checkbox"/> The report describes how the county modified its past procurement processes to successfully expand its partnerships with culturally specific providers. In year one, the county partnered with three culturally specific providers new to providing housing and homeless services in Clackamas County. Additional culturally specific providers will launch services in year two (p.11-13) .	<input type="checkbox"/>
<i>What disparities and gaps remain</i>	<input checked="" type="checkbox"/> The report summarizes the results of the county's racial equity analysis showing racial disparities in exits to permanent housing, unmet need, and length of time homeless (p.10-11) .	<input type="checkbox"/>
F) SHS/Affordable Housing Bond Alignment		
<i>Projects where SHS/Metro Affordable Housing Bond funding is integrated - # of PSH units, # of other permanent housing units (e.g. homeless preference units that are not PSH)</i>	<input checked="" type="checkbox"/> The county integrated supportive housing services funded by SHS into three bond-funded housing developments (Tukwila Springs, Fuller Road Station, Marylhurst Commons). The three projects will provide a total of 248 units, 101 of which are designated as PSH (p.16) .	<input type="checkbox"/>
<i>Optional: Describe how you've been able to leverage the Affordable Housing Bond</i>	<input checked="" type="checkbox"/> The bond-funded projects will provide 101 units of PSH that will serve SHS program participants, with onsite services provided by the SHS program (p.16) .	<input type="checkbox"/>
G) Evaluation/Quality Improvement		
<i>Any strategies to adjust or augment SHS programming to improve performance and outcomes in future years</i>	<input checked="" type="checkbox"/> The report notes that the county is engaged in continuous quality improvement. It references specific strategies such as (a) modifications to year-two contracts informed by input from a new Lived Experience Board; (b) SHS staff meet monthly with contracted service providers to monitor performance and assist with service implementation and problem	<input type="checkbox"/>

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	solving; (c) the county joined the Built for Zero initiative which provides access to technical assistance and additional resources; (d) staff are participating in workshops to improve the coordinated entry system (p.15) . The report also outlines plans for significant expansions in service provider contracts, budget allocations, and programming in year two (p.19-20) .	
<i>Demonstration that improvement strategies are grounded in data</i>	<input checked="" type="checkbox"/> The report states that the equity analysis will inform efforts to refine strategies. The county also recently formed a Lived Experience Board to provide recommendations and feedback; their input informed program design changes incorporated into year two contracts (p.15) .	<input type="checkbox"/>
<i>Any evaluation activities planned and performed (required in Year 3)</i>	<input checked="" type="checkbox"/> The county plans to implement focus groups in 2023 in partnership with Coalition of Communities of Color and Unite Oregon to measure its effectiveness in delivering culturally responsive services (p.15) .	<input type="checkbox"/>
H) Financial Report		
<i>Narrative that describes how you spent your funds that contribute to outcomes</i>	<input checked="" type="checkbox"/> The report includes a narrative summarizing the county's commitment of \$10.8 million in funding in year one, with approximately \$7.5 million of those funds committed to contracts for services that will launch in year two. Total expenditures in year one were \$3.35 million (p.16-17) .	<input type="checkbox"/>
<i>Full financial reporting: use the annual reporting template developed by the FRT</i>	<input checked="" type="checkbox"/> Appendix D (p.36) provides a full financial report using the required template.	<input type="checkbox"/>
<i>A list of providers under contract with SHS funds, and the amount of SHS funds contracted with each provider (can use template in financial workbook).</i>	<input checked="" type="checkbox"/> Appendix D (p.37) lists providers under contract with SHS funds in year one and the amount of SHS funds contracted with each provider.	<input type="checkbox"/>
<i>A certification that the county did not reduce funding commitments (did not displace funds) for SHS in the Fiscal Year</i>	<input checked="" type="checkbox"/> Appendix D (p.36) includes a certification of non-displacement of funds.	<input type="checkbox"/>
SECTION 2: CONSISTENCY WITH LOCAL IMPLEMENTATION PLAN AND REGIONAL GOALS		
A) Progress Toward SHS 10-Year Regional Program Goals		
<i>Prioritize funding for households experiencing chronic homelessness, especially communities of color</i>	<input checked="" type="checkbox"/> Clackamas County prioritized funding for households in Population A and focused on expanding partnerships with culturally specific providers to prioritize services to communities of color (p.26-28, 12-13) .	<input type="checkbox"/>
<i>5,000 households experiencing chronic homelessness connected to permanent supportive housing</i>	<input checked="" type="checkbox"/> 104 households in Population A were placed into supportive housing in year one, and the county is positioned to place a larger number of households in subsequent years (p.3, 26-28) .	<input type="checkbox"/>
<i>10,000 households at risk of or experiencing homelessness stabilized in permanent housing</i>	<input checked="" type="checkbox"/> 35 households in Population B were placed into supportive housing in year one, and the county is positioned to place a larger number of households in subsequent years. (p.3, 26-28) .	<input type="checkbox"/>
<i>Eliminate racial disparities in access to services and outcomes of supportive housing services programs</i>	<input checked="" type="checkbox"/> Clackamas County's equity analysis suggests its SHS program is helping to address racial disparities in access to services, and it is committed to continuing to strengthen its efforts to eliminate disparities (p.10-12) .	<input type="checkbox"/>
<i>Create a regionally-aligned flexible rent assistance program</i>	<input checked="" type="checkbox"/> Clackamas County worked with its regional partners to develop and implement RLRA as a regionally-aligned flexible long-term rent assistance program (p.5) .	<input type="checkbox"/>

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<p><i>Develop additional strategies to advance regional alignment and coordination via the Tri-County Planning Body</i></p>	<p><input checked="" type="checkbox"/> Clackamas County worked with its regional partners on strategies to advance regional alignment in data reporting and establishment of a regional service provider network (p.8). Additional regional strategies via the Tri-County Planning Body will be advanced in year two.</p>	<p><input type="checkbox"/></p>
<p>B) Alignment with LIP Year One Planned Investments</p>		
<p>Housing-related investments in LIP: <i>Year 1-3 priorities:</i></p> <ul style="list-style-type: none"> ▪ Increase emergency shelter capacity including acquisition/development as well as long-term lease opportunities, with wrap around services to transition people to permanent housing; ▪ Increase housing placement services including those designed to be culturally responsive; ▪ Expand existing high performing programs including eviction prevention; and ▪ Convert time-limited vouchers into long-term and short-term rent assistance. <p><i>Year one investments:</i></p> <ul style="list-style-type: none"> ▪ Long-term rent assistance: \$4.2M ▪ Short-term rent assistance: \$1.3M ▪ Eviction prevention: \$0.6M ▪ Housing placement: \$2M ▪ Emergency shelter/ transitional housing: \$2.1M ▪ Shelter acquisition/lease: \$3.5M 	<p>Clackamas County's year-one housing-related activities and investments generally align with its LIP planned investments, but at a smaller scale due to the significantly reduced budget compared with LIP projections. Some planned investments will not be launched until year two due to budget constraints.</p> <p><i>Year one activities:</i></p> <ul style="list-style-type: none"> ▪ Stabilized two emergency/transitional programs that were at risk of closing (p.3, 6) ▪ Provided housing navigation and placement services to 95 households through five SHS-contracted service providers including culturally specific providers (p.5) ▪ Placed 122 households in permanent supportive housing using long-term rent assistance (p.3-4) ▪ Approved an additional 80 households for RLRA vouchers (p.5) ▪ Provided eviction prevention using non-SHS funds (p.3) <p><i>Year one investments (p.18):</i></p> <ul style="list-style-type: none"> ▪ Long-term rent assistance: \$1M ▪ Short-term rent assistance: \$0M ▪ Shelter, outreach and safety on/off the street: \$0.3M 	<p><input type="checkbox"/></p>
<p>Supportive services investments in LIP: <i>Year 1-3 priorities:</i></p> <ul style="list-style-type: none"> ▪ Increase outreach and engagement using trauma informed care and other best practices that are culturally and linguistically responsive; ▪ Expand wrap around services to support housing stabilization, including behavioral health services, mental health services, addiction recovery and case management; ▪ Expand behavioral health services integrated with homelessness and housing services, particularly community-based health connectors and peer supports. <p><i>Year one investments:</i></p>	<p>Clackamas County's year-one supportive services activities and investments generally align with its LIP planned investments, but at a smaller scale due to the significantly reduced budget compared with LIP projections. Some planned investments will not be launched until year two due to budget constraints.</p> <p><i>Year one activities:</i></p> <ul style="list-style-type: none"> ▪ Expanded partnerships with service providers, particularly culturally specific organizations (p.3) ▪ Provided supportive housing case management to all 122 households placed in PSH (p.5) ▪ Partnered with the county's Behavioral Health Division to fund two mental health positions to support housing case management (p.7) <p><i>Year one investments:</i></p> <ul style="list-style-type: none"> ▪ Supportive housing services: \$1.1M (p.18) 	<p><input type="checkbox"/></p>

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<ul style="list-style-type: none"> ▪ Supportive housing services: \$2.4M ▪ Outreach: \$1.2M 		
C) Alignment with LIP Year One Goals		
<p>Year one goals in LIP</p> <ul style="list-style-type: none"> ▪ Supportive housing services: 200 households ▪ Long-term rent assistance: 250 units ▪ Short-term rent assistance: 130 households ▪ Eviction prevention: 110 households ▪ Housing placement: 200 households ▪ Emergency housing – shelter/transitional: 65 units ▪ Outreach: 500 households ▪ Housing retention: 75% 	<p>Appendix C (p.35) lists year one progress toward LIP goals but does not include information on all of the goals that were in the LIP. The goals that are reported on are:</p> <ul style="list-style-type: none"> ▪ Supportive housing services: 122 households ▪ Long-term rent assistance: 202 households (includes 122 households leasing and 80 households approved and searching for housing) ▪ Housing placement: 122 households ▪ Emergency housing – shelter/transitional: 100 units <p>SHS funds were not used for short-term rent assistance or eviction prevention in year one. The report indicates that the SHS outreach program will launch in year two. Housing retention data are not provided in the report.</p>	<input type="checkbox"/>
D) Alignment with LIP Racial Equity and Inclusive Engagement Strategies		
<p>Racial equity strategies in LIP</p> <p>Clackamas County commits to ongoing analysis of disparities, engagement with Communities of Color, and the continued development of strategies to overcome racial disparities. The plan outlines specific initial strategies to advance racial equity within SHS programs including focusing services on specific populations, improving infrastructure and services to appropriately serve specific racial and cultural groups, the creation of Permanent Supportive Housing preference policies, prioritizing funding investments to culturally specific providers, improving access to services, providing capacity building support for existing and emerging culturally specific organizations, and ensuring all agencies are culturally responsive.</p>	<p>In year one, Clackamas County:</p> <ul style="list-style-type: none"> ▪ Conducted an updated analysis of disparities (p.10-12) ▪ Contracted with the Coalition of Communities of Color and Unite Oregon to provide technical assistance to strengthen their racial equity strategies (p.11-12) ▪ Implemented procurement strategies designed to expand partnerships with culturally specific organizations, resulting in contracts with several new culturally specific partners (p.11-12) ▪ Prioritized funding investments to culturally specific providers (p.11-13) ▪ Improved rates of service participation for people identifying as Black/African American, Native Hawaiian/Pacific Islander, and Hispanic/Latin(a)(o)(x) (p.12) 	<input type="checkbox"/>
<p>Inclusive engagement strategies in LIP</p> <p>Clackamas County plans to continue to engage stakeholders, with a specific emphasis on Communities of Color and other historically underserved communities, to inform specific investments and the</p>	<p>The county's Continuum of Care Steering Committee has 12% of members identifying as BIPOC and 12% with lived experience of homelessness or housing instability; in year two the county plans to recruit additional members with lived experience, prioritizing candidates who identify as BIPOC. The county's Youth Action Board has 50% of members identifying as BIPOC and 100% with lived experience (p.13).</p>	<input type="checkbox"/>

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<p><i>design of SHS programs. To promote inclusive engagement, the County will continue to employ strategies such as providing engagement options outside normal business hours, engaging culturally specific organizations, leveraging existing advisory bodies, and providing stipends, child care and translation.</i></p>	<p>In year two, the county launched a Lived Experience Board to provide recommendations and feedback on service planning and provision. The county also plans to partner with the Coalition of Communities of Color and Unite Oregon in year two to conduct focus groups with program participants from the BIPOC community (p.15).</p>	
<p>E) Alignment with LIP Capacity Building Strategies</p>		
<p>Procurement and partners strategies in LIP <i>The County plans to expand its network of providers through procurement solicitations that target smaller organizations and non-traditional partners, with an emphasis on culturally specific organizations. The County commits to work toward a procurement process that meets SHS goals, such as the requirement of diversity within organizational staffing, the requirement of providers to deliver services in a culturally specific and/or responsive manner, prioritizing funding to organizations that align with workforce equity standards, and establishing equitable rates of pay. All service providers will be required to submit an organizational equity plan that centers racial equity and incorporates culturally responsive practices into their service delivery model.</i></p>	<p>The county conducted two sets of procurements, with the second one incorporating strategies to encourage smaller organizations to apply. The procurements promoted equity and transparency by providing pre-proposal meetings where applicants could ask questions and receive feedback, offering debriefings for unsuccessful applicants, and simplifying and streamlining the application process (p.9). Points were awarded to agencies that demonstrated they were culturally specific (p. 11). These procurement strategies enabled the county to successfully expand its partnerships with culturally specific providers. In year one, the county partnered with three culturally specific providers new to providing housing and homeless services in Clackamas County. Additional culturally specific providers will launch services in year two (p.12-13, 33-34). Several of the new providers are small organizations (p.9).</p>	<input type="checkbox"/>
<p>Capacity building strategies in LIP <i>Building community-based organization capacity is an investment priority for Phase I (years 1-3). This includes providing technical assistance, training, infrastructure development, addressing pay equity concerns, helping to stabilize staffing, and investing in capacity building to expand and establish culturally specific services. \$2.7 million is allocated in year one to assist community-based organizations, including culturally specific organizations, to build capacity for the new program.</i></p>	<p>The county's SHS contracts in year one include several smaller community-based and culturally specific organizations. Year one expenditures for contracts with culturally specific organizations totaled \$527,476. The report does not specify whether any of the contracted funding was committed to capacity building (p.12-13). The report states that the county's goal is to foster the organizations' growth with funding and in-kind technical assistance (p.9).</p>	<input type="checkbox"/>
<p>Leverage strategies in LIP <i>The implementation of the plan will leverage Clackamas County's Continuum of Care and the Housing Authority of Clackamas County's existing</i></p>	<p><i>Note: Reporting on leverage was not an explicit requirement in the annual report template. This review covers the information related to leverage that was included in the year one report.</i></p> <ul style="list-style-type: none"> ▪ Federal funds (FEMA and ARPA) were leveraged to stabilize an emergency hotel/motel program at risk of closing (p.3) 	<input type="checkbox"/>

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<p><i>investments. SHS resources will also be aligned with other funding efforts such as the Regional Supportive Housing Impact Fund. The County is analyzing potential services that could be covered by Medicaid and strategies to facilitate those leverage opportunities. The County also commits to improve behavioral health services alignment with housing and homelessness programs.</i></p>	<ul style="list-style-type: none"> ▪ The SHS program partnered with the county's Behavioral Health Division to fund two mental health positions to support housing case management (p.7) ▪ The SHS program partnered with other county departments to leverage additional resources, such as rental assistance and case management (p.7) ▪ The SHS program leveraged Emergency Housing Vouchers in conjunction with SHS-funded case management and partnered with the county's Bridges to Housing Program to make RLRA vouchers available to participants (p.7) 	
SECTION 3: FINANCIAL MONITORING		
A) Was Spending Consistent with Approved LIP Year One Budget?		
<p><i>Year one budget projections in the LIP were based on an estimated \$24.5 million in SHS revenues, and included:</i></p> <ul style="list-style-type: none"> ▪ <i>Housing and services for Pop A & B: \$19.3M</i> ▪ <i>Capacity building for CBOs/Program operations: \$2.7M</i> ▪ <i>Administrative: \$1.25M</i> ▪ <i>Regional projects/efforts: \$1.25M</i> 	<p>Year one spending was \$3.4M, or 34% of the revised year one budget of \$10M, and 14% of the original LIP budget of \$24.5M. Expenditures in year one included (p.36):</p> <ul style="list-style-type: none"> ▪ Housing and services for population A & B: \$2.4M ▪ SHS program operations: \$516,328 ▪ SHS program and RLRA administration: \$391,523 ▪ Regional strategic initiatives: \$18,000 ▪ Debt service and interest distribution fees: \$31,248 	<input type="checkbox"/>
B) Are Administrative Costs Reasonable?		
<p><i>The Metro-County IGAs recommend, but do not require, administrative costs do not exceed 10% for Regional Long-Term Rent Assistance (RLRA) and 5% for all other SHS costs.</i></p>	<ul style="list-style-type: none"> ▪ Administrative costs on RLRA were 13% of total RLRA costs (p.36) ▪ Administrative costs on all other SHS costs were 11% of total SHS costs (p.36) 	<input type="checkbox"/>

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Requirement	Metro Staff Review <i>A checked box indicates requirement has been met. Page numbers reference the annual report.</i>	SHSOC Notes
SECTION 1: COMPLETION OF ANNUAL REPORT TEMPLATE REQUIREMENTS		
A) Executive Summary		
<i>Narrative that summarizes progress and outcomes under the local implementation plan and the program budget for the year</i>	<input checked="" type="checkbox"/> The Executive Summary summarizes overall progress and outcomes, with a narrative that focuses on (a) the expansion or launch of 31 programs; (b) the use of SHS dollars to provide emergency shelter to 357 people, place 1,129 people in housing, and prevent evictions and homelessness for 9,156 households; (c) system capacity investments in behavioral health; and (d) leveraging of Portland and Metro Housing Bonds to increase local Supportive Housing capacity. The Executive Summary briefly summarizes the year one budget and anticipated year two budget (p.3-4).	<input type="checkbox"/>
<i>Annual progress to goals, including narrative of whether you met the goals or not</i>	<input checked="" type="checkbox"/> The Executive Summary highlights key year one accomplishments and notes that the county followed its local implementation plan. It does not explicitly compare the accomplishments to the county's LIP goals, and that information is not included in the body of the report (p.3-4).	<input type="checkbox"/>
<i>Types of programs launched, services provided, by population type (A/B)</i>	<input checked="" type="checkbox"/> The Executive Summary provides a high-level summary of programs launched and services provided with some information on population type (p.3-4). Additional details are available in the body of the report.	<input type="checkbox"/>
B) Investment Areas and Impact/Outcomes		
Reporting on all required regional outcome and equity metrics (section 5.2 of Metro SHS Work Plan):		
<i>Data Disaggregation: All data about people/households in this section disaggregated by race/ethnicity, disability status, gender.</i>	<input checked="" type="checkbox"/> The report provides some data on people/households disaggregated by race/ethnicity, disability status, and gender (p.18-21). It does not disaggregate all the required data in this section.	<input type="checkbox"/>
<i>Housing Stability: Number of supportive housing units created and total capacity, compared to households in need of supportive housing</i>	<input checked="" type="checkbox"/> Some of the required data are provided: <ul style="list-style-type: none"> Units of supportive housing created: SHS funds were used to leverage opportunities to increase local supportive housing capacity by over 1,200 housing opportunities (p.4) Total inventory/capacity of supportive housing: No data provided Households in need of supportive housing: No data provided 	<input type="checkbox"/>
<i>Housing Stability: Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year and outflow</i>	<input checked="" type="checkbox"/> Some of the required data are provided: <ul style="list-style-type: none"> Households experiencing housing instability: No data provided Households experiencing homelessness: 5,228 people (p.22) Households placed into stable housing: 4,560 systemwide; 1,129 with SHS funds (p.5) 	<input type="checkbox"/>
<i>Housing Stability: Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing) and</i>	<input checked="" type="checkbox"/> Data are provided but not for all the categories required in the report template (p.19-21): <ul style="list-style-type: none"> Supportive housing placements: 1,129 people RLRA placements (subset of above): 260 households RRH placements: No data provided 	<input type="checkbox"/>

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<i>priority population type. Please use the quarterly report template data charts for this metric</i>	<ul style="list-style-type: none"> ▪ OPH placement: No data provided ▪ Preventions: SHS funds helped prevent evictions for 9,156 people (p.7) 	
<u>Housing Stability: Housing retention rates</u>	<input type="checkbox"/> Retention data are not available for year one because this metric is measured one year after housing placement. The report provides supplemental data for 6-month retention rates for RLRA placements (p.20) .	<input type="checkbox"/>
<u>Housing Stability: Length of homelessness and returns to homelessness</u>	<input type="checkbox"/> Required data not provided: <ul style="list-style-type: none"> ▪ Average length of time homeless in system: No data provided ▪ Returns to homelessness: No data provided 	<input type="checkbox"/>
<u>Housing Stability: Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice</u>	<input checked="" type="checkbox"/> The report describes leveraged funds but does not provide amounts (p.23) : <ul style="list-style-type: none"> ▪ Capital investments leveraged: Portland and Metro housing bond funds ▪ Other services system funds leveraged: HUD Continuum of Care, Multnomah County general funds, and other federal, state and local funds ▪ Other resources (Federal, State, Local) leveraged: SHS funds leveraged federal funds for two domestic violence rapid rehousing projects; SHS funds were aligned with 476 federal Housing Choice Vouchers and federal COVID-19 emergency rent assistance programs 	<input type="checkbox"/>
<u>Equitable Service Delivery: Scale of investments made through culturally specific service providers to measure increased capacity over time</u>	<input checked="" type="checkbox"/> Some of the required data are provided: <ul style="list-style-type: none"> ▪ Amount of funding to culturally specific services providers: The report lists all contracted service providers and SHS funds received but does not specify which providers are culturally specific (p.25-27) ▪ Other resources designated for culturally specific services providers: The report notes that providers, including culturally specific providers, received capacity building funds (p.12-13) 	<input type="checkbox"/>
<u>Equitable Service Delivery: Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages</u>	<input type="checkbox"/> A comprehensive compensation, classification and benefits study of all contracted providers is currently in progress and will be released in year two (p. 17) .	<input type="checkbox"/>
<u>Equitable Service Delivery: Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience</u>	<input type="checkbox"/> These data are currently being collected, with a report to be released in year two (p.12) .	<input type="checkbox"/>
<u>Engagement & Decision-making: Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness</u>	<input checked="" type="checkbox"/> All required data are provided (p.22) : <ul style="list-style-type: none"> ▪ % of local advisory committee/board and oversight committee members who identify as BIPOC: 48% ▪ % of local advisory committee/board and oversight committee members who have lived experience of housing stability or homelessness: 28% 	<input type="checkbox"/>
Program year implementation progress data:		
<i>Reporting on investments and activities for Year 1 and achievement data. Disaggregate data that is about people. Include Population A and B breakdown by</i>	<input checked="" type="checkbox"/> The <i>Investment Areas and Impact</i> section of the report (p.5-9) provides a summary of the following year one activities and achievements, with some disaggregated data available on pages 17-21:	<input type="checkbox"/>

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<p><i>program type and reporting on specific programs (e.g. RLRA)</i></p>	<ul style="list-style-type: none"> ▪ Supportive Housing: Contracted providers helped 1,129 people secure permanent housing supported by SHS funds; more than 130 new project-based PSH units were created in local-bond-funded sites. ▪ System Access & Navigation: SHS investments supported: 450 families with case worker assistance to help them access shelter and housing resources; 2,640 people experiencing unsheltered homelessness with outreach worker support; 136 households with legal assistance; and the creation of a new culturally specific assessment team that completed 250 additional housing assessments. ▪ Housing Placement & Retention: Move-In Multnomah was used to test out strategies for accelerating SHS-funded housing placements, assisting 125 households to move into housing through landlord incentives and recruitment. ▪ Prevention & Diversion: SHS funds helped prevent evictions through a combination of rental assistance, housing case management and legal support, including 537 households with eviction notices who received legal services through the Oregon Law Center. ▪ Safety On & Off the Streets: SHS funds supported services to over 3,800 people including alternative and emergency shelter expansions and operations, addiction support services, employment opportunities, hygiene services, navigation workers, and partnerships with behavioral health. 	
<p><i>A brief analysis of how SHS program investments have contributed to the values and goals of the SHS program; include a narrative on cross sector coordination efforts and other investment areas</i></p>	<p><input checked="" type="checkbox"/> The report notes that year one investments were centered in the SHS program values and guiding principles of racial equity, investments in proven solutions, evolving and improving existing systems, developing best practices for new systems, regionalism and collaboration, community engagement, and cross-system coordination (p.5). The report includes examples of cross-sector work such as (a) the Rapid Response Eviction Prevention Program, which is a partnership among the County, the Portland Housing Bureau, Home Forward, legal assistance providers and community-based organizations; (b) SHS investment in the Behavioral Health Division's PATH Team outreach program; and (c) a partnership with the Portland Housing Bureau, Health Share and Care Oregon to incorporate SHS and Medicaid-funded services in bond-funded projects.</p>	<p><input type="checkbox"/></p>
<p>C) Regional Coordination of Access to Services Between Partner Jurisdictions</p>		
<p><i>A summary of coordination work across the three counties to date; describe all regional efforts</i></p>	<p><input checked="" type="checkbox"/> The <i>Regional and Cross-Sector Coordination</i> section of the report (p.10-11) summarizes tri-county coordination in:</p> <ul style="list-style-type: none"> ▪ Developing the RLRA program, drafting regionally consistent policies, and coordinating program evaluation and improvement ▪ Building a regional service provider network through a tri-county procurement process ▪ Establishing regional data systems and standards 	<p><input type="checkbox"/></p>
<p>D) Provider Capacity and Expansion</p>		

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<i>System baseline information if possible – list of providers under contract with counties before measure</i>	<input type="checkbox"/> The report does not provide a list of providers under contract before the measure.	<input type="checkbox"/>
<i>A list of all the service providers under contract with each county that received Program Funds, and the amount of funds received by each contractor</i>	<input checked="" type="checkbox"/> The report lists all service providers under contract that received SHS funds, and the amount of funds received by each contractor (p.25-27) .	<input type="checkbox"/>
<i>Description of how procurement processes were equitable and transparent</i>	<input checked="" type="checkbox"/> The report notes that the Tri-County Request for Program Qualifications added 89 service providers to the regional provider network, all of which demonstrated a commitment to culturally responsive or specific service provision. Selection decisions were made by a racially and geographically diverse panel of reviewers, drawn from all three counties (p.10) . The county is also working to create a standard process to integrate additional culturally specific providers into its various systems of care while providing greater transparency about how SHS funds are allocated (p.11) .	<input type="checkbox"/>
E) Equity Analysis		
<i>Reporting on the success or failure of racial inequity mitigation strategies and steps being taken to improve racial equity outcomes.</i>	<input checked="" type="checkbox"/> The <i>Equity Analysis</i> section of the report (p.12-15) lists the commitments the county made in the LIP to improve housing placement outcomes and to prioritize communities of color that are over-represented in HMIS. The report notes that during year one, the county initiated each of these commitments, with specific programmatic outcomes outlined in the <i>Investment Areas and Impacts</i> section. The county will continue to invest in these strategies in year two, including continuing to prioritize Black, Indigenous, Latino/a/x, Asian, Native Hawaiian, Pacific Islander, and other people of color for new housing opportunities.	<input type="checkbox"/>
<i>Analysis of disaggregated outcomes data</i>	<input checked="" type="checkbox"/> The <i>Equity Analysis</i> section of the report (p.12-15) summarizes the results of an analysis comparing the SHS-funded housing placements with the total people served in year one that meet the definition of Population A. The analysis found that (a) some BIPOC communities are receiving housing placement at a higher rate, some at a proportionate rate, and some at a lower rate than they appear in the chronic homeless population; (b) people identifying as a gender other than singularly female or male were served at a lower rate than their share of the total number of people served in Population A; (c) youth in Population A were prioritized for housing placement. Additional disaggregated outcomes data is available in the charts on p. 18-21 but without interpretation of the data.	<input type="checkbox"/>
<i>Culturally specific provider expansion strategies and impact</i>	<input checked="" type="checkbox"/> The county provided one-time capacity-building funds to organizations, including culturally specific organizations, to support organizational infrastructure, increased wages and program development. A report to be released in year two on provider staff wages and demographics will support the identification of additional opportunities for capacity building, with a particular focus on culturally specific organizations (p.12-13) .	<input type="checkbox"/>
<i>What disparities and gaps remain</i>	<input checked="" type="checkbox"/> The county's equity analysis found that Native American and Alaska Native people are receiving SHS housing placement at a lower rate than their percentage of the chronic homeless population. The Point in Time Count also showed that several BIPOC communities	<input type="checkbox"/>

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	are overrepresented in the county's homeless population, particularly the unsheltered population (p.13-14) .	
F) SHS/Affordable Housing Bond Alignment		
<i>Projects where SHS/Metro Affordable Housing Bond funding is integrated - # of PSH units, # of other permanent housing units (e.g. homeless preference units that are not PSH)</i>	<input checked="" type="checkbox"/> The report does not provide a comprehensive list of units where Metro bond funding is integrated but does reference examples of Portland and Metro bond-funded units that are being combined with SHS funding to create project-based PSH. These include six projects with a combined 130 PSH units and 32 Homeless Preference Units (p.6) .	<input type="checkbox"/>
<i>Optional: Describe how you've been able to leverage the Affordable Housing Bond</i>	<input checked="" type="checkbox"/> Nine of 14 affordable housing projects funded through Metro's bond will include a total of 260 supportive housing units; SHS will pay for supportive housing services in five of the projects (p.15-16) .	<input type="checkbox"/>
G) Evaluation/Quality Improvement		
<i>Any strategies to adjust or augment SHS programming to improve performance and outcomes in future years</i>	<input checked="" type="checkbox"/> SHS has funded quality improvement efforts including a comprehensive wage study of qualified providers, the development of a new coordinated access tool, and implementation of the Built for Zero framework. The year two budget includes investments to achieve pay equity across programs and increase front-line staff salaries (p.16-17) .	<input type="checkbox"/>
<i>Demonstration that improvement strategies are grounded in data</i>	<input checked="" type="checkbox"/> The report notes that the county monitored quantitative and qualitative data from year one to strengthen and improve the quality of SHS-funded programs. The county developed a detailed data collection process to ensure funded programs are serving BIPOC communities and uses disaggregated data to inform program and process changes. The wage study currently underway will inform efforts to address wage inequities in year two and beyond. The coordinated access improvements were informed by a feedback process with providers and people who have lived experience (p.16-17) .	<input type="checkbox"/>
<i>Any evaluation activities planned and performed (required in Year 3)</i>	<input checked="" type="checkbox"/> In addition to the data gathering and evaluation activities described above, the report notes that the development of a regional evaluation framework for SHS funding in year two will help to inform program improvements (p.17) .	<input type="checkbox"/>
H) Financial Report		
<i>Narrative that describes how you spent your funds that contribute to outcomes</i>	<input checked="" type="checkbox"/> The report includes a narrative that notes the year one budget of \$52 million and briefly summarizes year one investments. The accompanying financial report provides more details on how funds were spent (p. 23) .	<input type="checkbox"/>
<i>Full financial reporting: use the annual reporting template developed by the FRT</i>	<input checked="" type="checkbox"/> The report includes a full financial report using the main components of the required template (p.24-25) .	<input type="checkbox"/>
<i>A list of providers under contract with SHS funds, and the amount of SHS funds contracted with each provider (can use template in financial workbook).</i>	<input checked="" type="checkbox"/> The report includes a list of providers under contract with SHS funds in year one and the amount of SHS funds received by each provider (p.25-27) .	

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A certification that the county did not reduce funding commitments (did not displace funds) for SHS in the Fiscal Year	<input type="checkbox"/> The report does not include a certification that the county did not displace funds for SHS in the fiscal year.	<input type="checkbox"/>
SECTION 2: CONSISTENCY WITH LOCAL IMPLEMENTATION PLAN AND REGIONAL GOALS		
A) Progress Toward SHS 10-Year Regional Program Goals		
Prioritize funding for households experiencing chronic homelessness, especially communities of color	<input checked="" type="checkbox"/> Multnomah County prioritized SHS funding for households in Population A, especially communities of color, and invested in partnerships and capacity building of culturally specific organizations (p.13,19).	<input type="checkbox"/>
5,000 households experiencing chronic homelessness connected to permanent supportive housing	<input checked="" type="checkbox"/> Multnomah County placed 962 households from Population A in housing (p.19).	<input type="checkbox"/>
10,000 households at risk of or experiencing homelessness stabilized in permanent housing	<input checked="" type="checkbox"/> Multnomah County placed 167 households from Population B in housing (p.19). SHS funds also helped to prevent evictions for 9,156 people (p.7).	<input type="checkbox"/>
Eliminate racial disparities in access to services and outcomes of supportive housing services programs	<input checked="" type="checkbox"/> Multnomah County's equity analysis suggests its SHS program is helping to reduce racial disparities in access to services, and it is committed to continuing to strengthen its efforts to eliminate disparities (p.12-14).	<input type="checkbox"/>
Create a regionally-aligned flexible rent assistance program	<input checked="" type="checkbox"/> Multnomah County worked with its regional partners to develop and implement RLRA as a regionally-aligned flexible long-term rent assistance program (p.10).	<input type="checkbox"/>
Develop additional strategies to advance regional alignment and coordination via the Tri-County Planning Body	<input checked="" type="checkbox"/> Multnomah County worked with its regional partners on a coordinated procurement process and on advancing regional alignment in data reporting (p.10). Additional regional strategies via the Tri-County Planning Body will be advanced in year two.	<input type="checkbox"/>
B) Alignment with LIP Year One Planned Investments		
Housing-related investments in LIP: Overall priorities (not just year one): <ul style="list-style-type: none"> Supportive Housing: supportive housing in projects approved through the bond; supportive housing with enhanced services for aging, behavioral health and other significant physical needs; project-based transitional and recovery-based housing; PSH designed for specific communities over-represented among homeless populations; and permanent and transitional supportive housing units designed for people exiting institutional settings. Long-Term Rental Assistance: A "local Section 8" program to take various forms, including attaching to new units of supportive housing being developed, existing affordable and market rate units, and tenant-based vouchers that may last several years or as long as the tenant remains income-eligible. 	Multnomah County's year-one housing investments and activities generally align with its LIP priorities: <ul style="list-style-type: none"> Supportive Housing: Contracted providers helped 1,129 people secure permanent housing supported by SHS funds; more than 130 new project-based PSH units were created in local-bond-funded sites (p.5). Long-Term Rental Assistance: The three counties established the regional long-term rental assistance program, and 260 households in Multnomah County were placed in housing with an RLRA voucher in year one (p.10,20). Flexible Rental Assistance: SHS funds helped prevent evictions for 9,156 people through a combination of rental assistance, case management and legal support (p.7). Shelter Services: SHS funds supported alternative and emergency shelter expansions and operations including a shelter bed set-aside program for people faced with relocation; operations at emergency shelters representing 160 beds; and the addition of 137 rooms of non-congregate shelter (p.8). 	<input type="checkbox"/>

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<ul style="list-style-type: none"> • Flexible Rental Assistance: Medium-term rental assistance options based on participant need, eviction prevention rent assistance for people living doubled up or to allow people to stay longer in institutional settings, and funds to address a range of financial obstacles to housing. • Shelter Services: Housing-focused year-round shelter, and alternative sheltering options to address immediate interim shelter needs during COVID, culturally-responsive and specific shelters for communities of color, transgender people and people with disabilities. 		
<p>Supportive services investments in LIP: Overall priorities (not just year one):</p> <ul style="list-style-type: none"> • Behavioral Health Services: Behavioral health services including culturally specific mental health and addiction recovery services, trauma-informed approaches, and peer support services. • Education, Training, Employment and Benefits Acquisition: Services will be aimed at increasing incomes and reducing the need for rental assistance and long-term services. • Housing Case Management: Housing placement and retention assistance that comes with financial resources, tenant education, tenant advocacy, household goods, and other transition services. • Legal Assistance: Civil legal assistance to enforce rights and ensure that people are free from discrimination. • Family Supports: Investments in child care and other supports that make it possible for families with children to obtain and maintain housing. 	<p>Multnomah County's year-one supportive services investments and activities generally align with its LIP priorities:</p> <ul style="list-style-type: none"> • Behavioral Health Services: the Joint Office leveraged County behavioral health services through an expansion of emergency shelter and behavioral health outreach to support people experiencing unsheltered homelessness; RLRA was matched to existing programs providing intensive behavioral health case management (p.4). • Education, Training, Employment and Benefits: More than 359 people received employment training and services leveraged with SHS funds (p.9). • Housing Case Management: SHS investments supported 450 families with case worker assistance to help them access shelter and housing resources (p.6). • Legal Assistance: SHS funds supported 136 households with legal assistance (p.6); 537 households with eviction notices received legal services through the Oregon Law Center (p.8). 	<input type="checkbox"/>
C) Alignment with LIP Year One Goals		
<p>Year one goals in LIP Multnomah County's LIP did not include year one goals. These goals were included in the year one budget presented to Metro Council:</p> <ul style="list-style-type: none"> • Supportive Housing: 800 new PSH opportunities • Rapid Rehousing: 500 new placements 	<p>The report does not explicitly compare year one outcomes with LIP goals. The year one goals that are included in the report's outcome information are:</p> <ul style="list-style-type: none"> • Supportive Housing: 962 permanent housing placements for Population A (p.19) • Preventions: SHS funds helped prevent eviction for 9,156 people (p.7) • Shelter/temporary housing: 137 new rooms plus support for operations of 160 beds (p.8) • Outreach/engagement: 2,640 unsheltered individuals received outreach support (p.6) 	<input type="checkbox"/>

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<ul style="list-style-type: none"> • <i>Preventions: 600+</i> • <i>Shelter/temporary housing: up to 400 new beds</i> • <i>Outreach/engagement: 1500 unsheltered individuals navigated to services and shelter</i> • <i>Employment: 100 people engaged in low-barrier employment</i> 	<ul style="list-style-type: none"> • Employment: 359 people received employment training (p.9) 	
D) Alignment with LIP Racial Equity and Inclusive Engagement Strategies		
<p>Racial equity strategies in LIP</p> <p><i>Multnomah County states all strategies to combat homelessness must be rooted in racial equity and justice and a comprehensive set of strategies to overcome racial disparities in the homeless response system will be formulated and updated throughout the implementation. Initial strategies will include investing in data collection; data and administrative capacity for culturally-specific organizations; and supporting providers to more actively center race in service delivery. Additionally, Multnomah County commits to maintaining low-barrier program eligibility requirements, including low-barrier documentation, as well as options for participants in SHS-funded programs to self-report data required for program eligibility.</i></p>	<p>Multnomah County's racial equity strategies in year one included:</p> <ul style="list-style-type: none"> • Prioritizing BIPOC populations for housing opportunities (p.13) • Maintaining low-barrier program eligibility requirements (p.13) • Improving system navigation services for BIPOC populations (p.13) • Allocating resources to culturally-specific organizations for expansion (p.13) • Investing in technical assistance to support new and expanded programming (p.13) • Investing in culturally specific programming (p.13) • Developing a data collection process to ensure funded programs are serving BIPOC communities (p.16) 	<input type="checkbox"/>
<p>Inclusive engagement strategies in LIP</p> <p><i>Multnomah County employed supportive and inclusive engagement to eliminate barriers to participation in development of the Plan. This included the use of incentives, providing opportunities outside of business hours, translating key engagement materials, and leveraging existing scheduled meetings to reduce scheduling burdens. Multnomah County will continue to employ strategies that promote inclusive engagement.</i></p>	<p>The county engaged providers and people with lived experience in a culturally responsive and culturally specific feedback process to inform improvements to the coordinated access system to make it more inclusive (p.17).</p> <p>The county will be launching a new SHS Advisory Committee, Equity Committee and Lived Experience Committee in year two (p.22).</p>	<input type="checkbox"/>
E) Alignment with LIP Capacity Building Strategies		
<p>Procurement and partners strategies in LIP</p> <p><i>Multnomah County has developed procurement standards consistent with SHS goals, such as commitment to Housing First and other best practices,</i></p>	<p>Multnomah County coordinated with Washington and Clackamas counties on the Tri-County RFPQ, a collaborative procurement that added 89 pre-qualified service providers eligible to contract for SHS services. All qualified providers demonstrated a commitment to provide culturally responsive or specific services, and they include new culturally specific</p>	<input type="checkbox"/>

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<p><i>the requirement of diversity within organizational staffing, and the requirement of providers to deliver services in a culturally-specific and/or culturally-responsive manner. Organizations that align with workforce equity standards will be prioritized. Multnomah County plans to develop a significant procurement for new SHS programs in the latter half of year one (FY21/22), potentially in cooperation with the region. This decision is to ensure time to center the needs and perspectives of communities of color in the procurement design process — to identify specific practices, processes, policies and rules that continue to exclude Communities of Color from accessing resources in the homeless system of care.</i></p>	<p>organizational partners (p.10-11). During year one, the county also began planning a more equitable and transparent procurement process that will be implemented in year two. This includes a calendar that lists funding opportunities available throughout the fiscal year with clear communication around funding availability and allocation and increased opportunities for vendors to submit proposals (p.11).</p>	
<p>Capacity building strategies in LIP <i>Providing technical assistance, training, and financial support to assist community based organizations — especially culturally specific organizations — to be ready to take on new and/or significantly expanded services in Multnomah County and across the region. This will include a formal evaluation of CBO compensation levels, hiring, and retention challenges.</i></p>	<p>In year one, the county provided one-time capacity-building funds to organizations, including culturally specific organizations. The funds supported organizational infrastructure, increased wages and program development. Additional capacity-building funds will be available in year two as well as funds to provide technical assistance for data management, fiscal policies, organizational development and other technical support. A report on provider wages and demographics to be released in year two will inform additional opportunities for capacity building (p.12).</p>	<input type="checkbox"/>
<p>Leverage strategies in LIP <i>As the Joint Office of Homeless Services serves as the lead agency for Multnomah County’s Continuum of Care, the County plans to align current and future federal funding with SHS program funds and will work with the Oregon Housing and Community Services to leverage and align state spending with the goals of the program. Through expanding partnerships with the County’s Health Department, Coordinated Care Organizations, and the regional hospital systems, they will expand partnerships and align investments in the full range of supportive housing types with the health care systems, and to advocate collectively for improved utilization of Medicaid.</i></p>	<p><i>Note: Reporting on leverage was not an explicit requirement in the annual report template. This review covers the information related to leverage that was included in the year one report.</i></p> <p>To maximize the SHS program’s impact, the county leveraged funding including federal Continuum of Care funds, Multnomah County general funds, and other federal, state and local funds. SHS funds were also aligned with federal Housing Choice Vouchers and COVID-19 emergency rent assistance programs (p.23).</p>	<input type="checkbox"/>

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SECTION 3: FINANCIAL MONITORING

A) Was Spending Consistent with Approved LIP Year One Budget?

<p><i>Year one budget projections were based on an estimated \$52 million in SHS revenues, and included:</i></p> <ul style="list-style-type: none"> ▪ Shelter, outreach & safety on/off street: \$10.3M ▪ Short-term housing assistance: \$9.4M ▪ Permanent supportive housing services: \$8.7M ▪ Long-term rent assistance: \$4.7M ▪ Other supportive services: \$5.4M ▪ System development & capacity building: \$5.3M ▪ System support, planning & coordination: \$3.4M ▪ Admin: \$3M ▪ Other costs: \$2M 	<p>Year one spending was \$36.4 million, or 70% of the budget of \$52.1 million. Expenditures in year one included (p.24-25):</p> <ul style="list-style-type: none"> ▪ Shelter, outreach & safety on/off street: \$5.3M ▪ Short-term housing assistance: \$18.5M ▪ Permanent supportive housing services: \$3.9M ▪ Long-term rent assistance: \$743,076 ▪ Other supportive services: \$2.7M ▪ System development & capacity building: \$3.4M ▪ System support, planning & coordination: \$587,815 ▪ Admin: \$1.3M ▪ Other costs: \$0M 	<input type="checkbox"/>
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B) Are Administrative Costs Reasonable?

<p><i>The Metro-County IGAs recommend, but do not require, administrative costs do not exceed 10% for Regional Long-Term Rent Assistance (RLRA) and 5% for all other SHS costs.</i></p>	<ul style="list-style-type: none"> ▪ Administrative costs on RLRA were 15% of total RLRA costs (p.25) ▪ Administrative costs on all other SHS costs were 3% of total SHS costs (p.25) 	<input type="checkbox"/>
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**Washington County
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Requirement	Metro Staff Review	SHSOC Notes
<i>A checked box indicates requirement has been met. Page numbers reference the annual report.</i>		
SECTION 1: COMPLETION OF ANNUAL REPORT TEMPLATE REQUIREMENTS		
A) Executive Summary		
<i>Narrative that summarizes progress and outcomes under the local implementation plan and the program budget for the year</i>	☑ The Executive Summary summarizes overall progress and outcomes, with a narrative that focuses on (a) RLRA rent assistance and housing-focused case management; (b) expanded shelter capacity; (c) modernization of the county's coordinated entry system; (d) investments in the capacity of culturally specific organizations; and (e) development of a strong foundation for an expanded system of care (p.1). The Executive Summary does not provide budget information, but that information is provided in the body of the report (p.14).	<input type="checkbox"/>
<i>Annual progress to goals, including narrative of whether you met the goals or not</i>	☑ The Executive Summary provides a summary of year one accomplishments. It does not compare the accomplishments to the county's LIP goals (p.1). Additional details on progress to goals are available in the body of the report.	<input type="checkbox"/>
<i>Types of programs launched, services provided, by population type (A/B)</i>	☑ The Executive Summary provides a high-level summary of programs launched and services provided (p.1). Additional details are available in the body of the report.	<input type="checkbox"/>
B) Investment Areas and Impact/Outcomes		
Reporting on all required regional outcome and equity metrics (section 5.2 of Metro SHS Work Plan):		
<i>Data Disaggregation: All data about people/households in this section disaggregated by race/ethnicity, disability status, gender.</i>	☑ Data on people/households that are reported on in this section are disaggregated by race/ethnicity, but not by disability status or gender.	<input type="checkbox"/>
<i>Housing Stability: Number of supportive housing units created and total capacity, compared to households in need of supportive housing</i>	☑ All required data are provided (p.17). ▪ Units of supportive housing created: 790 ▪ Total inventory/capacity of supportive housing: 1,173 ▪ Households in need of supportive housing: 1,426 total need (651 unmet need)	<input type="checkbox"/>
<i>Housing Stability: Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year and outflow</i>	☑ Data are provided for this metric but not in the categories in the annual report template. Data provided are for households entering the system by entry point, exiting the system by exit type, and unserved by entry point (p.18). ▪ Households experiencing housing instability: No data provided ▪ Households experiencing homelessness: No data provided ▪ Households placed into stable housing: No data provided	<input type="checkbox"/>
<i>Housing Stability: Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing) and priority population type. Please use the quarterly report template data charts for this metric.</i>	☑ Data are provided for SHS-funded housing placements and prevention (p.25-26), but not for the other categories and without the details in the quarterly report template data chart. ▪ Supportive housing placements: 305 households ▪ RLRA placements (subset of above): 305 households ▪ RRH placements: No data provided (assumed to be zero) ▪ OPH placement: No data provided (assumed to be zero)	<input type="checkbox"/>

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	<ul style="list-style-type: none"> ▪ Preventions: 20 households 	
<i><u>Housing Stability:</u> Housing retention rates</i>	<input type="checkbox"/> Retention data are not available for year one because this metric is measured one year after housing placement. The report provides supplemental data for year one on retention rates to date for RLRA placements (p.29) .	<input type="checkbox"/>
<i><u>Housing Stability:</u> Length of homelessness and returns to homelessness</i>	<input checked="" type="checkbox"/> All required data are provided (p.20) . <ul style="list-style-type: none"> ▪ Average length of time homeless in system: 2.14 years ▪ Returns to homelessness: 6.8% 	<input type="checkbox"/>
<i><u>Housing Stability:</u> Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice</i>	<input checked="" type="checkbox"/> All required data are provided (p.28) : <ul style="list-style-type: none"> ▪ Capital investments leveraged: The SHS program leveraged Metro Affordable Housing Bond funding through two projects. ▪ Other services system funds leveraged: SHS investments in five Housing Liaison positions leveraged the capacity of 11 registered nurses, 53 resource coordinators, 5 behavioral health care coordinators, and population-specific resource navigation services funded through the county's Health and Human Services department. ▪ Other resources (Federal, State, Local) leveraged: SHS investments in rent assistance leveraged an additional \$123,552 in Federal Emergency Rent Assistance. 	<input type="checkbox"/>
<i><u>Equitable Service Delivery:</u> Scale of investments made through culturally specific service providers to measure increased capacity over time</i>	<input checked="" type="checkbox"/> All required data are provided (p.28) : <ul style="list-style-type: none"> ▪ Amount of funding to culturally specific services providers: \$3.4 million ▪ Other resources designated for culturally specific services providers: The county committed to provide culturally specific providers with three-year capacity building support grants, with \$50,000 allocated in year one for each provider. 	<input type="checkbox"/>
<i><u>Equitable Service Delivery:</u> Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages</i>	<input type="checkbox"/> The report notes that this information was not gathered in year one due to lack of a data collection methodology; a survey is being created to gather this data in year two (p.29) .	<input type="checkbox"/>
<i><u>Equitable Service Delivery:</u> Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience</i>	<input type="checkbox"/> The report notes that this information was not gathered in year one due to lack of a data collection methodology; a survey is being created to gather this data in year two (p.29) .	<input type="checkbox"/>
<i><u>Engagement & Decision-making:</u> Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness</i>	<input checked="" type="checkbox"/> The report provides demographic data for the Homeless Plan Advisory Body, which is the advisory body for the SHS program, but does not provide data on lived experience (p.29) . <ul style="list-style-type: none"> ▪ % of local advisory committee/board and oversight committee members who identify as BIPOC: Demographic data disaggregated by race/ethnicity provided on p.29. ▪ % of local advisory committee/board and oversight committee members who have lived experience of housing stability or homelessness: No data provided. 	<input type="checkbox"/>
Program year implementation progress data:		

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<i>Reporting on investments and activities for Year 1 and achievement data. Disaggregate data that is about people. Include Population A and B breakdown by program type and reporting on specific programs (e.g. RLRA)</i>	<input checked="" type="checkbox"/> The <i>Investment Areas and Impact</i> section of the report (p.2-8) provides a summary of the following year one activities and achievements, with some disaggregated data available in Appendix A (p.17-27). <ul style="list-style-type: none"> ▪ Housing Case Management Services: Through partnerships with 19 agencies, this program assisted 305 households in securing and retaining permanent supportive housing. ▪ Regional Long-term Rent Assistance: The RLRA program resulted in 305 households obtaining stable housing and includes a Landlord Liaison program to support housing placement. ▪ Bridge Shelter Program: Three Bridge Shelter programs added 100 shelter beds with wrap-around supports. ▪ Winter Shelter: Winter shelter bed capacity was expanded from 150 beds to 212 and the county strengthened inclement weather shelter program capacity. ▪ Community Connect: Modernization of the county's coordinated entry system focused on capacity building and equity improvements, leading to a 60% increase in assessments. ▪ Training and Technical Assistance: The county provides ongoing support for new and existing partners, including weekly office hours, trainings, and technical support. 	<input checked="" type="checkbox"/>
<i>A brief analysis of how SHS program investments have contributed to the values and goals of the SHS program; include a narrative on cross sector coordination efforts and other investment areas</i>	<input checked="" type="checkbox"/> The report does not explicitly articulate how SHS program investments have contributed to the values and goals of the SHS program, but that information is implicit throughout the report. The <i>Regional and Cross Sector Coordination</i> section of the report (p.9-10) highlights several cross-sector initiatives: (a) the Housing Liaison Pilot embeds five housing liaisons within Health and Human Services Department programs to support housing placement; (b) partnerships with community-based health providers align housing and behavioral health services, including a behavioral health training series provided to SHS partners; (c) the county's PSH Request for Information leverages affordable housing units to create project-based PSH through commitments of SHS-funded rental assistance and supportive services.	<input type="checkbox"/>
C) Regional Coordination of Access to Services Between Partner Jurisdictions		
<i>A summary of coordination work across the three counties to date; describe all regional efforts</i>	<input checked="" type="checkbox"/> The <i>Regional and Cross Sector Coordination</i> section of the report (p.9-10) highlights regional coordination to build a regional provider network through a tri-county procurement process.	<input type="checkbox"/>
D) Provider Capacity and Expansion		
<i>System baseline information if possible – list of providers under contract with counties before measure</i>	<input type="checkbox"/> The report does not provide a list of providers under contract before the measure.	<input type="checkbox"/>
<i>A list of all the services providers under contract with each county that received Program Funds, and the amount of funds received by each contractor</i>	<input checked="" type="checkbox"/> The report provides a list of all service providers under contract to support SHS implementation (p.11). It does not list the amount of funds received by each contractor.	<input type="checkbox"/>
<i>Description of how procurement processes were equitable and transparent</i>	<input checked="" type="checkbox"/> The county co-led the Tri-County SHS Request for Program Qualifications to qualify suppliers for SHS program contracts. The procurement process built on the transparent and	<input type="checkbox"/>

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	equitable procurement practices established by Washington County in its first SHS RFPQ in 2020. The process included bilingual pre-proposal conferences for 276 attendees, a diverse panel of proposal reviewers, and prioritization of culturally responsive and specific services in proposal scoring criteria. The two procurements resulted in a pool of 116 pre-qualified SHS providers, creating a diverse range of potential partners. Among the 20 community-based service providers that the county contracted with in year one, 6 are culturally specific providers (p.10-11).	
E) Equity Analysis		
<i>Reporting on the success or failure of racial inequity mitigation strategies and steps being taken to improve racial equity outcomes.</i>	<input checked="" type="checkbox"/> The <i>Equity Analysis</i> section of the report (p.12-13) highlights some initial data that suggest the SHS program is having an impact on racial disparities: (a) the data demonstrate general proportionality in the demographics of the populations needing services and those being served; and (b) culturally specific organizations are serving more Black, Indigenous, Asian, Pacific Islander, Latina/o/e, refugees, and immigrants than other organizations. The analysis also notes that the overall population served in housing programming is still mostly white due to previous programming that did not effectively serve communities of color. The report focuses on the county's commitment to building capacity for culturally specific organizations and its plan to improve demographic data collection as key strategies that will support further improvements in racial equity.	<input type="checkbox"/>
<i>Analysis of disaggregated outcomes data</i>	<input checked="" type="checkbox"/> The <i>Equity Analysis</i> section of the report (p.12-13) notes that the county is working to establish a baseline for data analysis now and will continue to analyze data over time. It highlights a few data points that provide initial insights (see above). Appendix A includes additional disaggregated system outcomes data, but not does provide an interpretation of the data (p.17-27).	<input type="checkbox"/>
<i>Culturally specific provider expansion strategies and impact</i>	<input checked="" type="checkbox"/> The prioritization of culturally specific services in the county's SHS procurement processes resulted in contracts with 6 culturally specific providers. The county's SHS program includes a three-year \$50,000 annual administrative support grant for all culturally specific contractors. The SHS program issued these funds to four organizations in year one and will continue to expand this support in year two (p.12).	<input type="checkbox"/>
<i>What disparities and gaps remain</i>	<input checked="" type="checkbox"/> The report notes that the overall population retained in housing is still mostly white due to disparities in previous programming (p.12-13). The data in Appendix A (p.17-27) provide indications of additional disparities and gaps, but the report does not provide an analysis of the data or a clear articulation of what it demonstrates about disparities and gaps.	<input type="checkbox"/>
F) SHS/Affordable Housing Bond Alignment		
<i>Projects where SHS/Metro Affordable Housing Bond funding is integrated - # of PSH units, # of other permanent housing units (e.g. homeless preference units that are not PSH)</i>	<input checked="" type="checkbox"/> Metro Affordable Housing Bond funding is integrated with SHS in two projects: (a) the Aloha Inn, which will provide 54 units of PSH, and (b) the Viewfinder, which uses SHS funding to provide support for 30 PSH units (p.28).	<input type="checkbox"/>

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<i>Optional: Describe how you've been able to leverage the Affordable Housing Bond</i>	<input checked="" type="checkbox"/> The SHS program has leveraged 30 units at the bond-funded Viewfinder to create PSH by providing SHS-funded case management and resident services (p.28) .	<input type="checkbox"/>
G) Evaluation/Quality Improvement		
<i>Any strategies to adjust or augment SHS programming to improve performance and outcomes in future years</i>	<input checked="" type="checkbox"/> The <i>Looking Ahead</i> section of the report (p.15-16) summarizes planned additions to SHS programming in year two, including (a) outreach program expansion; (b) launch of Rapid Rehousing and Rapid Resolutions programs; (c) roll out of a Workforce Development Pilot; (d) shelter expansion focused on specialized shelters and provision of shelter capital funding; (e) expanding and supporting the capacity of culturally specific providers; (f) evaluating the diversity of the housing, outreach and shelter workforce; and (g) evaluation and quality improvement across all program areas.	<input type="checkbox"/>
<i>Demonstration that improvement strategies are grounded in data</i>	<input checked="" type="checkbox"/> The report notes that in year two the county will prioritize monitoring and evaluating program outcomes to inform improvements (p.16) .	<input type="checkbox"/>
<i>Any evaluation activities planned and performed (required in Year 3)</i>	<input checked="" type="checkbox"/> The county plans to evaluate housing placement outcomes in year two along with an evaluation of the redesigned coordinated entry system (p.16) .	<input type="checkbox"/>
H) Financial Report		
<i>Narrative that describes how you spent your funds that contribute to outcomes</i>	<input checked="" type="checkbox"/> The report includes a brief narrative summarizing the annual budget and the funding that will roll over to year two, but without any details on how fund expenditures contributed to outcomes. The accompanying chart shows how funds were spent (p.14) .	<input type="checkbox"/>
<i>Full financial reporting: use the annual reporting template developed by the FRT</i>	<input checked="" type="checkbox"/> The report includes a summary-level financial report (p.14) . It does not include the more detailed financial report using the annual reporting template developed by the FRT.	<input type="checkbox"/>
<i>A list of providers under contract with SHS funds, and the amount of SHS funds contracted with each provider (can use template in financial workbook).</i>	<input checked="" type="checkbox"/> The report lists providers under contract with SHS but not the amount of SHS funds contracted with each provider (p.11) .	
<i>A certification that the county did not reduce funding commitments (did not displace funds) for SHS in the Fiscal Year</i>	<input checked="" type="checkbox"/> The report includes a statement confirming that funding was not displaced (p.14) .	<input type="checkbox"/>
SECTION 2: CONSISTENCY WITH LOCAL IMPLEMENTATION PLAN AND REGIONAL GOALS		
A) Progress Toward SHS 10-Year Regional Program Goals		
<i>Prioritize funding for households experiencing chronic homelessness, especially communities of color</i>	<input checked="" type="checkbox"/> Washington County prioritized funding for permanent supportive housing and invested in partnerships and capacity building of culturally specific organizations (p.2, 12) .	<input type="checkbox"/>
<i>5,000 households experiencing chronic homelessness connected to permanent supportive housing</i>	<input checked="" type="checkbox"/> Washington County placed 305 chronically homeless households in permanent supportive housing (p.1-2) .	<input type="checkbox"/>
<i>10,000 households at risk of or experiencing homelessness stabilized in permanent housing</i>	<input type="checkbox"/> The report does not indicate whether Washington County served households in Population B in year one.	<input type="checkbox"/>

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<i>Eliminate racial disparities in access to services and outcomes of supportive housing services programs</i>	<input checked="" type="checkbox"/> Washington County's equity analysis suggests its SHS program is helping to reduce racial disparities in access to services, and it is committed to continuing to strengthen its efforts to eliminate disparities (p.12-13) .	<input type="checkbox"/>
<i>Create a regionally-aligned flexible rent assistance program</i>	<input checked="" type="checkbox"/> Washington County worked with its regional partners to develop and implement RLRA as a regionally-aligned flexible long-term rent assistance program (p.3) .	<input type="checkbox"/>
<i>Develop additional strategies to advance regional alignment and coordination via the Tri-County Planning Body</i>	<input checked="" type="checkbox"/> Washington County worked with its regional partners on a coordinated procurement process to establish a regional service provider network (p.10) . Additional regional strategies via the Tri-County Planning Body will be advanced in year two.	<input type="checkbox"/>
B) Alignment with LIP Year One Planned Investments		
<p>Housing-related investments in LIP: Washington County's SHS system of care will include coordinated and strategic investments in the following housing-related program areas:</p> <ul style="list-style-type: none"> ▪ Shelter and transitional housing: Emergency winter and year-round shelter operations, including non-congregate and alternative shelter options. ▪ Housing barrier costs and short-term rent assistance: Financial and legal supports to help people overcome barriers to accessing or keeping housing, including rental application fees, security deposits, utility fees, flexible time-based rent support, etc. ▪ Regional long-term rent assistance: Permanent rent support for people with extremely low incomes that will be paired with ongoing services for people who need Supportive Housing. The monthly rent assistance program will be accompanied by additional programs such as landlord guarantees and building operation funds. 	<p>Washington County's year-one housing investments and activities generally align with its LIP priorities:</p> <ul style="list-style-type: none"> ▪ Year-round shelter: Three Bridge Shelter programs added 100 new and permanent shelter beds offering non-congregate settings and wrap-around supports geared toward achieving permanent housing placements (p.4). ▪ Winter Shelter: Winter shelter bed capacity was expanded from 150 beds to 212 and the county strengthened inclement weather shelter program capacity (p.5). ▪ Regional Long-term Rent Assistance: The RLRA program released funding for permanent rent assistance for more than 750 households, with 305 households obtaining stable housing in year one. The rent assistance is accompanied by landlord incentives and guarantees (p.1,3). 	<input type="checkbox"/>
<p>Supportive services investments in LIP: Washington County's SHS system of care will include the following support services to be funded in tandem with housing services:</p> <ul style="list-style-type: none"> ▪ Outreach and navigation services: Programs to help people access services and housing using person-centered, relationship building and Housing First approaches. This includes case 	<p>Washington County's year-one supportive services investments and activities generally align with its LIP priorities:</p> <ul style="list-style-type: none"> ▪ Community Connect: Modernization of the county's coordinated entry system streamlined service system access, leading to a 60% increase in assessments (p.6). ▪ Behavioral Health: A partnership with the county's Health and Human Services Department embeds housing liaisons within five programs including behavioral health programs to create better access to housing while leveraging existing services. Partnerships with three 	<input type="checkbox"/>

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<p><i>workers to connect people to housing, health care and other opportunities.</i></p> <ul style="list-style-type: none"> ▪ Behavioral health services: <i>Strategies that bring flexible, client-centered behavioral health services to housing and homeless services programs, including peer recovery specialists, community-based behavioral health connectors, and culturally specific services.</i> ▪ Supportive services: <i>Ongoing supports to ensure housing stability including behavioral healthcare, recovery programs and peer support, and resident services. Programs that help people access opportunities beyond housing and build toward a better future may also be included, such as education and employment programs and IDA savings accounts.</i> 	<p>community-based behavioral health providers create behavioral health expertise for the housing system and better alignment between housing and services (p.9).</p> <ul style="list-style-type: none"> ▪ Housing Case Management Services: The county partnered with 19 agencies to provide housing placement and retention services to 305 households and built program capacity to expand placement and retention services in year two (p.2). 	
C) Alignment with LIP Year One Goals		
<p>Year one goals in LIP</p> <ul style="list-style-type: none"> ▪ 500 supportive housing placements ▪ Housing stability achieved for an additional 500 households ▪ 100 year-round and 150 winter shelter beds ▪ A network of culturally specific service providers supported and in training as full partners in SHS program implementation 	<p>The report lists progress to goals (p.4) but does not include information on all the goals that were in the LIP. The goals that are reported on are:</p> <ul style="list-style-type: none"> ▪ 305 supportive housing placements ▪ 102 year-round shelter beds added <p>Other sections of the report also provide information on the following goals:</p> <ul style="list-style-type: none"> ▪ 62 winter shelter beds added (p.5) ▪ A network of 6 culturally specific providers under contract, with ongoing training and capacity building support, and additional providers pre-qualified to become partners (p.1, 10-12) 	<input type="checkbox"/>
D) Alignment with LIP Racial Equity and Inclusive Engagement Strategies		
<p>Racial equity strategies in LIP</p> <p><i>Washington County commits to advance racial equity through intentional strategies and investment priorities, and the creation of systems that prioritize the needs and experiences of people of color. The County's strategies to advance racial equity in SHS program implementation are informed by Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion and the Coalition of Communities of Color's 2018 racial justice report for Washington County. The strategies include meaningful engagement of</i></p>	<p>In year one, Washington County:</p> <ul style="list-style-type: none"> ▪ Conducted a racial equity analysis of the county's homeless services system (p.12, 21-27) ▪ Implemented two procurement processes to expand partnerships with organizations providing culturally responsive and culturally specific services, resulting in contracts with 6 culturally specific providers (p.10-11) ▪ Provided three-year capacity building grants to four culturally specific organizations along with ongoing technical assistance and cohort support (p.1, 12) ▪ Launched a plan to implement REALD data collection standards to better reflect the identities of service participants (p.13) 	<input type="checkbox"/>

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<i>communities of color, prioritizing culturally specific service provision, establishing a culturally responsive standard of care, developing procurement processes with racial equity at the core, and prioritizing a racially diverse workforce.</i>		
<i>Inclusive engagement strategies in LIP</i> <i>Washington County commits to employ strategies to promote continued inclusion of community stakeholders, focusing on communities of color, to inform SHS implementation. These strategies include scheduling community engagement activities outside of normal business hours, providing incentives for participation including stipends, removing barriers to participation by providing supports such as childcare and interpretation, engaging culturally specific organizations, and leveraging existing advisory committees and workgroups to reduce scheduling burdens.</i>	<p>The Housing Planning Advisory Committee, which updated its bylaws to include oversight of the SHS LIP, increased the percentage of its members that identify as Black, Indigenous, Latino/a/e, Asian, Pacific Islander, refugees or immigrants by 10 percentage points (p.8).</p> <p>The county conducted community engagement to develop guidelines for future shelter siting work, including engagement events and surveys with people experiencing homelessness, service providers, and community members at large (p.8).</p>	<input type="checkbox"/>
E) Alignment with LIP Capacity Building Strategies		
<i>Procurement and partners strategies in LIP</i> <i>Washington County commits to center equity, transparency and community engagement as core principles of its procurement and contracting practices. The County commits to recruit and support service providers that demonstrate a commitment to serving BIPOC participants with experience providing culturally specific and/or linguistically specific services.</i>	The county co-led the Tri-County SHS Request for Program Qualifications to qualify suppliers for SHS program contracts. The procurement process built on the transparent and equitable procurement practices established by Washington County in its first SHS RFPQ in 2020. The process included bilingual pre-proposal conferences for 276 attendees, a diverse panel of proposal reviewers, and prioritization of culturally responsive and specific services in proposal scoring criteria. The two procurements resulted in a pool of pre-qualified SHS providers of 116 organizations, creating a wider range of diverse suppliers to meet the population's needs. Among the 20 community-based service providers with SHS contracts, 6 are culturally specific providers (p.10-11) .	<input type="checkbox"/>
<i>Capacity building strategies in LIP</i> <i>The County's procurement standards will include explicit strategies to ensure equitable wages including (a) establishing service contracts that accurately estimate and compensate the full scope of work, and (b) conducting pay equity analyses of all service providers to ensure front-line employees receive livable wages. The County will provide supports to reduce contracting barriers for culturally specific and smaller organizations. This includes supporting capacity building work early in SHS implementation, especially</i>	To support the county's commitment to building capacity for culturally specific organizations, the SHS program includes three-year \$50,000 annual administrative support grants for all culturally specific organizations contracting with the county to provide SHS services. The SHS program issued these funds to four organizations in year one and will continue to build on this practice in the coming year along with technical assistance for culturally specific providers (p.12) . The SHS program also provides ongoing training and technical support for all new and existing partners, including weekly office hours, reoccurring trainings, and one-on-one technical support (p.7) .	<input type="checkbox"/>

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for culturally specific and culturally responsive providers.		
<p>Leverage strategies in LIP</p> <p>Washington County's Department of Housing Services, which will lead the County's SHS implementation, is the county's federal Continuum of Care lead agency. The County plans to strategically target SHS investments to leverage and fill gaps in existing CoC funding. The County also plans to align with and leverage other systems of care. This includes partnering with the County's Department of Health and Human Services and Department of Community Corrections, Oregon Health Authority, Coordinated Care Organizations, behavioral health systems, community development and affordable housing, and workforce and education systems. The plan identifies specific opportunities to align SHS programs with other systems, such as funding community-based health workers to connect people experiencing homelessness with the behavioral health system, providing housing navigation in behavioral health and medical facilities, leveraging affordable housing capital investments through the affordable housing bond, using SHS funding to ensure permanent housing stability for participants in the Kaiser Metro 300 program, etc.</p>	<p><i>Note: Reporting on leverage was not an explicit requirement in the annual report template. This review covers the information related to leverage that was included in the year one report.</i></p> <ul style="list-style-type: none"> ▪ The Housing Liaison pilot embeds housing liaisons within five Health and Human Services Department programs to leverage the service capacity of existing systems of care while creating better access to the housing system (p.9, p.28). ▪ Partnerships with three community-based behavioral health providers leverage behavioral health expertise and services to support the housing services system (p.9). ▪ The county is in contract negotiations with two affordable housing owners to create project-based PSH units in their buildings with SHS-funded services and RLRA (p.10). ▪ SHS investments leveraged additional Federal Emergency Rent Assistance for underserved communities of color (p.28). ▪ The SHS program leveraged funding from the Metro Affordable Housing Bond through two projects that will result in 84 units of PSH (p.28). 	<input type="checkbox"/>
SECTION 3: FINANCIAL MONITORING		
A) Was Spending Consistent with Approved LIP Year One Budget?		
<p>Year one budget projections in the LIP were based on an estimated \$38 million in SHS revenues, and included:</p> <ul style="list-style-type: none"> ▪ Supportive housing to serve population A: \$22.5M ▪ Housing stability to serve population B: \$7.5M ▪ Building a shelter system for populations A and B: \$5M ▪ Building an equitable system of care for populations A and B: \$3M 	<p>Year one spending was \$16.2M, or 55% of the revised year one budget of \$29.3M and 43% of the original LIP budget of \$38M. Expenditures in year one included (p.14):</p> <ul style="list-style-type: none"> ▪ Housing and support services: \$2.8M ▪ Shelter services: 4.0M (plus 3.3M pending FEMA reimbursement) ▪ Housing financial assistance: \$1.3M ▪ Systems and capacity building: \$200,000 ▪ Program operating costs: \$3.4M ▪ Interfund payment: \$1.1M ▪ Reserves: \$7.9M 	<input type="checkbox"/>
B) Are Administrative Costs Reasonable?		

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<i>The Metro-County IGAs recommend, but do not require, administrative costs do not exceed 10% for Regional Long-Term Rent Assistance (RLRA) and 5% for all other SHS costs.</i>	Administrative costs are not broken out on Washington County's financial report.	<input type="checkbox"/>
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Memo

Date: November 10, 2022
To: Supportive Housing Services Oversight Committee
From: Rachael Lembo, Finance Manager
Subject: Review of financial information in FY22 Annual Reports

Metro has reviewed the financial information provided in the counties' Annual Reports for the inaugural year of the Supportive Housing Services program. This memo summarizes key observations to assist the Oversight Committee with its review.

Overall, the FY22 financial reports show investment in staff and service provider capacity, an increase in services over the first year of the program, and contract commitments in place to ensure continued growth in the second year.

Note: Metro and the counties have developed a Budget and Financial Reporting template that the counties will begin using in FY23. The template aligns program categories across the counties' Local Implementation Plans and provides a consistent format for easier review.

Key question: Do the FY22 financial reports show that spending was consistent with approved local implementation plans, as reflected in the FY22 budgets?

- **Washington County**
 - Overall, total spending was \$16.2 million, or 55% of the budget of \$29.3 million.
 - **Shelter services** had the highest spending by category, \$4 million, and the highest percentage of budget at 66%.
 - The County reported \$21.9 million in contracts, demonstrating an ability to expand services in year two of the program.
- **Multnomah County**
 - Overall, total spending was \$36.4 million, or 70% of the budget of \$52.1 million.
 - **Short-term Housing Assistance** had the highest spending by category, \$18.5 million, and the highest percentage of budget at 197% (spending was almost twice the budgeted amount).
 - The County reported spending by quarter, which shows that spending over the year increased from less than \$3 million in each of the first two quarters to \$5 million in the third quarter, and \$25 million in the fourth quarter. While fourth quarter spending is always the highest due to the timing of invoices and year-end accruals, this clearly indicates a rapid expansion of programming.
- **Clackamas County**
 - Overall, total spending was \$3.4 million, or 34% of the budget of \$10 million.
 - **Permanent Supportive Housing Services** had the highest spending by category, \$1.1 million, closely followed by **Long-term Rent Assistance** at \$1 million.
 - The County reported contract commitments of \$10.8 million, demonstrating an ability to expand services in year two of the program.

Key question: Are administrative costs reasonable, or should they be reduced or increased? *The Metro-County IGAs recommend, but do not require, administrative costs do not exceed 10% for Regional Long-Term Rent Assistance (RLRA) and 5% for all other SHS costs.*

Administrative costs can vary widely based on services and provider structure. Metro recommends the counties provide additional explanation of administrative costs at the December SHS Oversight Committee meeting.

- **Washington County**
 - Administrative costs are not broken out on the financial report. Metro will reach out to Washington County to request additional information.
- **Multnomah County**
 - Administrative costs on RLRA were 15% of total RLRA costs.
 - Administrative costs on all other SHS costs were 3% of total SHS costs.
- **Clackamas County**
 - Administrative costs on RLRA were 13% of total RLRA costs.
 - Administrative costs on all other SHS costs were 11% of total SHS costs.