



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Agenda

Meeting: Supportive Housing Services Tri-County Planning Body Meeting
Date: February 12th, 2025
Time: 4:00pm-6:00pm
Place: Zoom Webinar, 600 NE Grand Ave, Portland, OR 97232
Purpose: The Tri-County Planning Body (TCPB) will discuss and vote on the Technical Assistance Regional Implementation Strategy.

4:00pm **Welcome and Introductions**

- Decision: meeting summary approval

4:10pm **Public Comment**

4:15pm **Conflict of Interest**

4:20pm **Staff Updates**

4:30pm **Technical Assistance Regional Implementation Strategy**

- Presentation
- Questions & Answers
- Decision: plan approval

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

- Next meeting: March 12th, 2025

6:00pm **Adjourn**

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Tri-County Planning Body Meeting Summary

Meeting: Supportive Housing Services (SHS) Tri-County Planning Body Meeting
Date: Wednesday, January 08, 2025
Time: 4:00 PM – 6:00 PM
Place: Metro Council Chambers, 600 NE Grand Ave, Portland, OR 97232 and Zoom Webinar
Purpose: The Tri-County Planning Body (TCPB) will receive an Update on Landlord Recruitment Goal Progress, COO's Future of Regional Housing Funding Recommendation and Regional Investment Fund (RIF).

Member attendees

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

Absent members

Monta Knudson (he/him)

Elected delegates

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

Absent delegates

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

County staff representatives

Clackamas County – Lauren Decker (she/her), Deyvin Molina (he/him) Multnomah County – Breanna Flores (she/they), Lawashia Mowe (she/her), Washington County – Nicole Stingh (she/her)

Metro

Michael Garcia (he/him), Abby Ahern (she/her), Holly Calhoun (she/her), Valeria McWilliams (she/her), Yesenia Delgado (she/her), Patricia Rojas (she/her)

Kearns & West Facilitators

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

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

Tri-County Planning Body Meeting Summary

Welcome and Introductions

Co-chairs Mercedes Elizalde and Steve Rudman provided opening remarks and reflected on the need for financial scenarios and criteria for future regional work.

Ben Duncan, Kearns & West, introduced himself, facilitated introductions, and reviewed the meeting agenda and objectives.

The TCPB approved the December Meeting Summary.

Public Comment

No public comment was received.

Conflict of Interest

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

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

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

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

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

Sahaan McKelvey declared a conflict of interest as Self Enhancement Inc (SEI) receives SHS funds. He noted that SHS does not fund his position and that he serves on the TCPB to share provider perspectives.

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

Staff Updates

Yesenia Delgado, Metro, shared that the SHS Oversight Committee is working on its annual report, which assesses county performance, discusses challenges and opportunities, and provides recommendations to Metro Council for oversight and accountability.

Breanna Flores, Multnomah County, introduced Lawashia Mowe as a new staff member that will support SHS work.

Regional Landlord Recruitment Progress Report

Abby Ahern, Metro, reviewed the approved Regional Landlord Recruitment Goal and Recommendation language. She provided an overview of how racial equity considerations were applied to the Implementation Plan (IP) by the Regional Landlord Recruitment Workgroup. She noted that the workgroup identified places in the IP where additional racial equity analysis should be completed and that further engagement with landlords and racial demographic data is needed.

Tri-County Planning Body Meeting Summary

Abby detailed the “communication and education plan” strategy, which included a timeline for a live webpage by Fall 2024 and a communications campaign to begin by June 2025. She also reviewed the “align financial incentives” strategy, which included a timeline for incentive alignment recommendations and a cost estimate by Quarter 1 of 2025.

Breanna detailed the “tracking and access to unit inventory” strategy and shared that they had 54 case managers trained on how to use the Housing Connector tool. She shared that the timeline for this strategy is to have a pilot contract begin in fiscal year (FY) 2025.

Deyvin Molina, Clackamas County, detailed the “prioritize quality problem-solving services” strategy, which included a 24/7 landlord hotline, which will be online by winter 2025. He clarified that winter 2025 is the end of quarter 2 of FY 2025-2026.

Abby reflected that they would remove seasons and be specific in timelines moving forward. She reviewed the “investigate needs for property management” strategy, which would have a consultant produce a memorandum with barriers to implementing mission-driven property management and strategies to address by June 2025.

Jake Kirsch, Housing Development Center (HDC), introduced himself and provided an overview of the Regional Long-term Rent Assistance Risk Mitigation Program (RLRA RMP). He reviewed that the goals of the RMP are to extend overall RLRA funding and to encourage claims to avoid legal action or tenant debt. He shared the physical damages and operational losses that are covered by the RMP, and that the RMP applies to both tenant-based and project-based RLRA. He shared the consolidated data for the RMP for FY 2023-2025, which had a total of 83 claims for a sum of \$317,458. He noted ways to strengthen the program include service provider partnerships, tenant notifications, and common areas.

Abby reviewed the IP fund budget (about \$8 million) and actuals (\$728,134). She noted that the RMP has a budget of \$6 million.

TCPB members had the following questions and comments:

- **Comment, Yoni:** The RMP is a critical resource to protect financial provider risks. When it comes to recruiting landlords, it is helpful to share the level of services a provider delivers while a client is placed in housing. A proactive approach can help landlords understand what the service provider and tenant relationship is.
 - **Metro response, Abby:** Metro is looking at consistent services for permanent supportive housing (PSH), and each county is working hard to set and meet those standards.
 - **Washington County response, Nicole Stingh:** It would be great if Metro could create a one-pager on what a provider-tenant relationship looks like to go along with other one-pagers that are provided.
- **Question, Co-chair Elizalde:** Who is hosting the website? What is the geographic area for the housing connector tool? If it is Multnomah County focused, that raises the question of where it could be funded in the future. What does the line item “support staffing for County landlord liaison” include?
 - **Metro response, Abby:** Metro is hosting the website.
 - **Multnomah County response, Breanna:** The RLRA team is considering the needs of where clients would like to be placed. We are at the beginning stages of those conversations, but the geographic area is focused on Multnomah County.
 - **Washington County response, Nicole S.:** It includes staffing for all three counties.

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- **Question, Eboni Brown:** Does the data on the RMP show if clients are exiting the RLRA program? If clients are evicted and no longer have a voucher, can the landlord still receive RMP funds?
 - **HDC response, Jake:** Landlords and property managers have 12 months to initiate a claim. If someone has moved on, but the damage occurred while the RLRA voucher was used, it can qualify for RMP funds as long as the claim is submitted within 12 months.
- **Comment, Co-chair Rudman:** There were many initiatives and recommendations in the study that was presented last year, and we should revisit what makes sense and do an assessment of how things are going. I have concerns about the 24/7 hotline and I am not sure if it needs to be 24 hours. The RMP is important.
- **Comment, Sahaan:** I generally like the direction of all these strategies, including the 24/7 hotline. I have received many calls from landlords at all times of the night, so I think it's valuable. For the Housing Connector pilot, where are the units geographically being considered? I would like to hear more about how to make the pilot regional to locate units throughout the Portland metro region. What considerations need to be applied to make that a reality? I am interested in making each county specific pilot a regional pilot. Can you speak more to the goals of mission-driven property management?
 - **Multnomah County response, Breanna:** Those consideration conversations are still occurring. Before we initiated the contract with Metro, we walked through what considerations each county has to account for to make a regional program. It is a learning experience, and we will see the data results from this. The geographic region for now is starting in Multnomah County.
 - **Clackamas County response, Deyvin:** Each county chose to lead one strategy and Clackamas County selected the 24/7 hotline. We want to fulfill our commitment and are doing work to determine how the 24/7-hour hotline will function.
 - **Washington County response, Nicole S.:** The strategy came from the Focus Strategy Memo, if it proves to be effective in improving relations and in cost analysis, it could be regionalized.
 - **Metro response, Abby:** A lot remains to be learned regarding mission-driven property management on why there is a piecemeal approach rather than a grand scale approach. Metro staff have good experience and scope in this to share moving forward once a consultant is hired. The consultant will help Metro understand how this can work and be expanded.
- **Comment, Cameran:** Some clients can live on their own successfully, others cannot. I always send RMP information to property managers. I believe the spending seems low because property managers do not have enough information about it. It could be helpful to have an RMP one-pager that shows what it covers and how the funds have been used in the past. Giving property managers tools and assurances of RMP success can increase usage numbers.
- **Comment, Zoi:** Reflecting on Co-chair Rudman's comment, perhaps the 24/7 hotline is not a critical service for \$500,000, and those funds could go to a more critical pilot.

Valeria McWilliams, Metro, thanked TCPB members for their comments and asked them to use the post-meeting survey to share any additional questions or comments.

Tri-County Planning Body Meeting Summary

COO's Future of Regional Housing Funding Recommendation Update | RIF Discussion

Holly Calhoun, Metro, reflected on the feedback TCPB shared with Metro Council from the December meeting. She shared that the proposed Council action removed the dedicated allocation for city programs and clarified the language to include that the TCPB regional goals are in the Regional Action Plan and accounts for a transition timeline between governing bodies. Holly reflected that the tax rate topic is a polarizing issue, and Metro is trying to find a balance to address multiple interests. She noted that Metro Council supports the need for regional funding and looks forward to learning from the scenario exercise the TCPB asked for counties to complete.

The scenario exercise the TCPB proposed for the three counties to complete is:

1. Scenario 1: All RIF approved work and any future work is part of Metro's admin budget
2. Scenario 2: RIF approved work and any future work is split between Metro's admin budget and the county's core service budget
3. Scenario 3: All RIF approved work is included in the county's core service budgets

Nicole S. shared that for scenario 1, Washington County would need about \$100,000 annually from Metro to support staff positions for no program cuts. For moderate program cuts reducing the landlord liaison work, it would need between \$50,000 and \$75,000. For scenario 2, the landlord goal would face program cuts, and Metro would need to fund and manage some contracts and programs. For scenario 3, the landlord goal would face severe cuts, with a priority to continue funding the RMP.

Lauren Decker, Clackamas County, shared that for scenario 1, staff and programming would be manageable to continue the RMP and health and housing integration work. For scenario 2, the landlord goal would remain under local control, and for health and housing cost sharing would require negotiations around behavioral health costs and resource mapping. For scenario 3, commitment to the RMP would be difficult and the health and housing work would need to be reevaluated.

Breanna reflected that RIF funds are set aside and protected, and if funds are combined with core services general fund dollars, they are more susceptible to any necessary budget changes. She added that other budget considerations include decreases in the Metro forecast that can be compounded yearly. For scenario 3, difficult decisions would need to be made, and advisory body conversations would begin. For scenario 2, there would be less expansive impacts, which could be worked through, and for scenario 1 would have the least risk for regional designated funding. She reflected that these decisions would also impact who holds and administers contracts and grants for regional work.

TCPB members had the following questions and comments:

- **Comment, Co-chair Elizalde:** I have started to build criteria on regional funding considerations for the TCPB's approval of additional implementation plans and will continue to add as the conversation continues. So far, considerations include who holds the contracts, how far along the work is, staff funding, and who is funding what components of the work.
- **Comment, Yoni:** I want to uplift regionalism and believe that collaboration and coordination can only produce effective outcomes. There are many challenges ahead including federal program uncertainty and workforce challenges. Additionally, the population we hope to serve is evolving, with many presenting with PSH needs. Our service system is difficult and inefficient to navigate. There are opportunities to connect resources, such as the Oregon Health Plan benefit. Decisions need to consider how to be efficient in a

Tri-County Planning Body Meeting Summary

humane way and how to implement productive changes iteratively to make sure regionalization leads to better outcomes.

- **Comment, Sahaan:** I agree with Yoni, and emphasize protecting the priority of regionalization. There are not enough funds to do everything, and I believe we must prioritize regionalization as it maximizes funding. If Metro or the counties are holding the costs, some level of funding should be reserved for regionalization, otherwise it will be cut. The region needs to be able to agree to prioritize regionalization and working together. This may mean fewer direct services but will open the pathway for regional growth, public satisfaction, and foundation funding sources.
- **Comment, Nicole Larson:** I advocate prioritizing regionalization. The way the regional investment fund was rolled out was problematic. It seems like there is room for the new governing body to improve how approved funds are used. For example, the body can decide if the \$6 million for the RMP is the correct amount.
- **Washington County Comment, Nicole S.:** Counties want to prioritize regionalization and learning from county colleagues. Regionalism also occurs outside the TCPB and takes dedicated staff time.
- **Comment, Cameran:** We are all on this body because we value regionalization. The message of regionalization needs to be heard outside of this room. Voters need to understand the value of regionalization when this goes to the ballot so regional funds and work are not voted away.
- **Comment, Mindy:** As we think about future investments and decisions, we should keep the focus on how to build a regional system that does not go away.

Ben reflected that TCPB members shared the importance of protecting regional funds and outcomes; identifying ways to braid funds and build systems; identifying ways to maintain regional staff, programs, and services; and that regionalism is important to ensure efficiency.

Co-chair Elizalde shared she updated the criteria list for implementation plans to reflect the discussion.

Holly thanked the TCPB for sharing their expertise and underscoring the value of regionalism.

Closing and Next Steps

Valeria thanked everyone for participating.

Ben shared that the next steps are:

- Metro to update implementation plan timelines to be specific.
- Next meeting: February 12, 2025
 - Training Implementation Plan

Adjourn

Adjourned at 6:10 p.m.

Technical Assistance Implementation Strategy

Tri-County Planning Body

February 12th, 2025



Overview

- Technical assistance proposal summary
- County technical assistance and regional collaboration to date
- Permanent Supportive Housing (PSH) Technical Research and Demonstration Project

Tri-County Planning Body

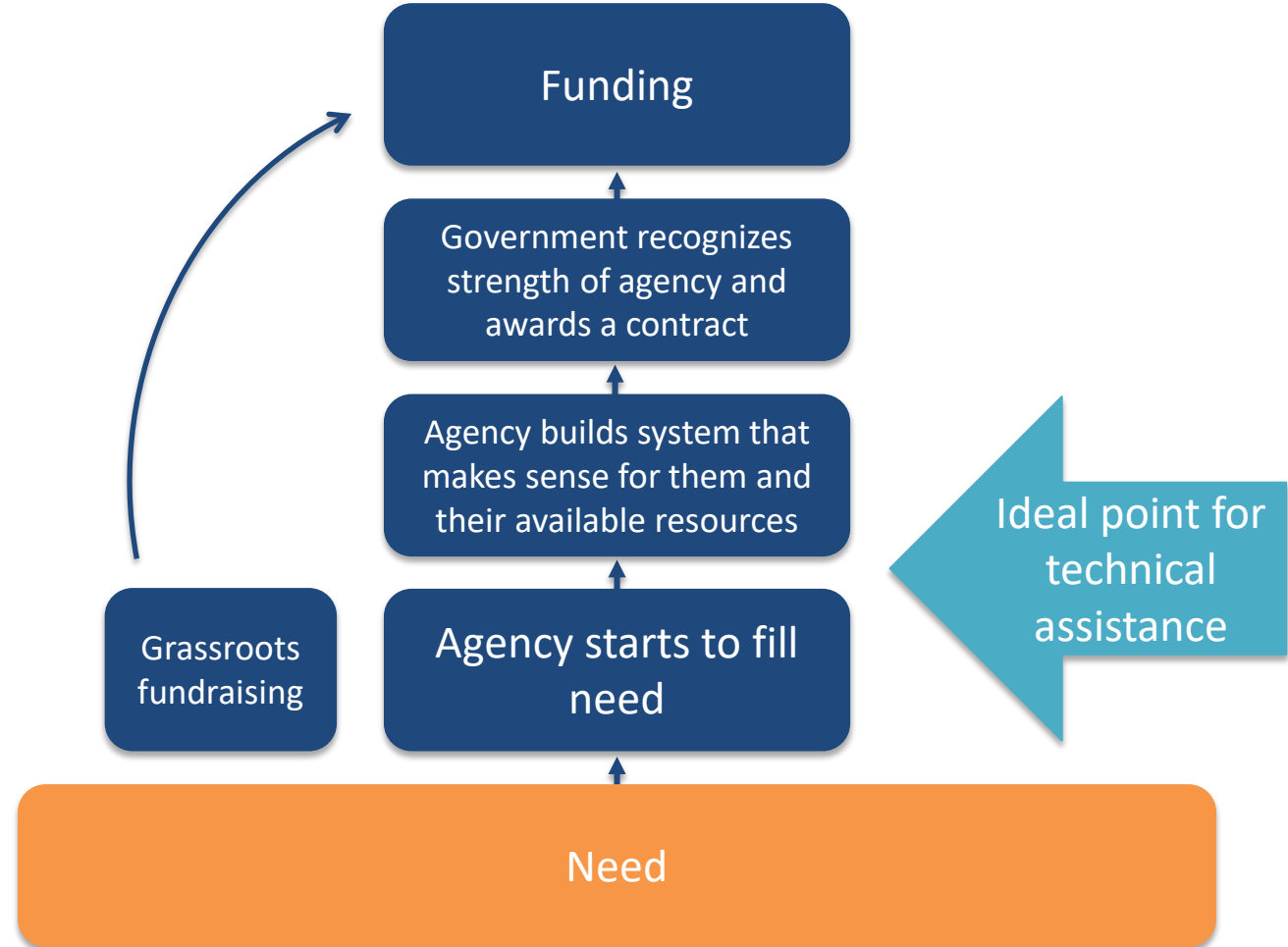
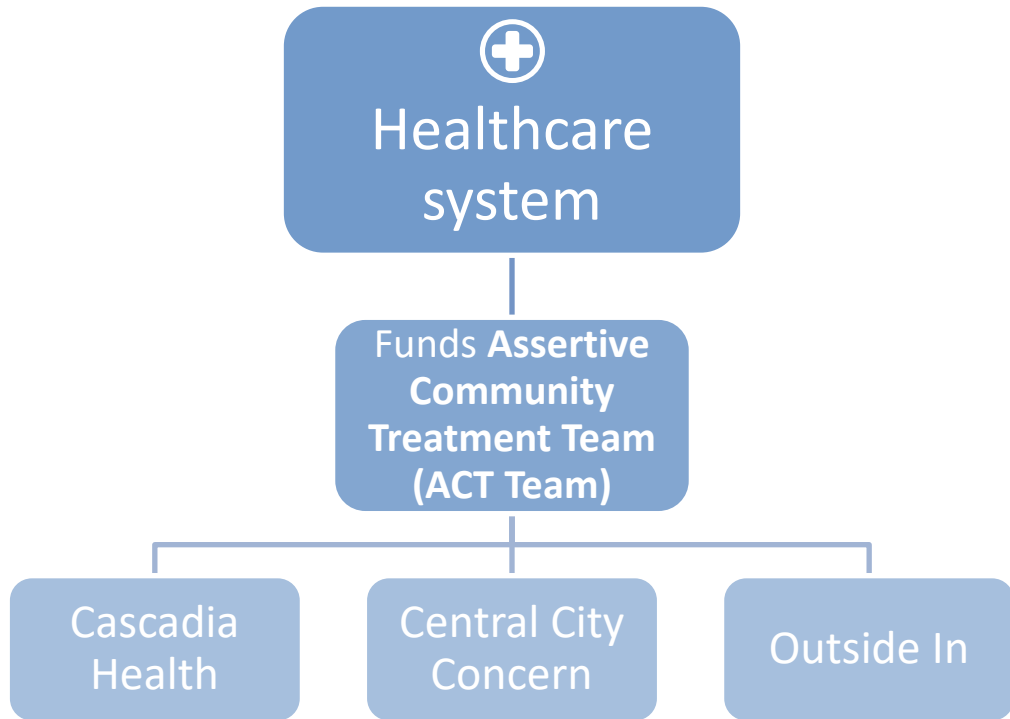
- **Goal:** Organizations having access to the tools they need to operate at a high level of organization functionality with the needs of culturally specific providers prioritized through all program design.
- **Guidance from Tri-County Planning Body members:**

Menu of TA
options

Develop consistent
practices for
service delivery
regionally

Honor provider
experience

Top-down vs. grassroots system building



Racial equity considerations

- Ensuring culturally specific provider expertise is centered in all efforts
- “Best practices” are often created through a dominant culture lens
- Replicate learnings from culturally specific providers across the region

Technical assistance implementation considerations

- Metro and Counties understanding unique TA needs of providers in each county, meeting their TA needs; two-way learning between providers and jurisdictions
- Jurisdictions aren't duplicating TA offerings
- TA learning results in regionally consistent practices

PSH Demonstration Project will help define roles and responsibilities for technical assistance between Metro and Counties

County technical assistance and regional collaboration to date



Technical Assistance from Clackamas County

- Consultants can bill up to **\$250,000** per year x **4 years** ≤ **\$1,000,000**
- SHS providers have access to these consultants for technical assistance
- Four providers, including two culturally specific providers have used TA for:
 - Policies and procedures
 - Administrative manuals
 - Grant manuals
 - Marketing
 - Fundraising
 - Fiscal business services
 - Human resources
 - Strategic planning
 - Program design

Technical Assistance from Multnomah County

- Joint Office finance staff and contract managers offered providers tailored technical assistance
- Consultants were paired with providers during RFPQs to assist with applications
- Partnership with United Way to allocate **\$10 million** to providers
 - Supports staff retention and recruitment
- System development grants for emerging culturally specific providers
 - **\$1.115 million to 12 agencies** awarded last fiscal year

Technical Assistance from Washington County

- Across three fiscal years, over **\$3.6 million in technical assistance/capacity building** has been awarded to 21 agencies (**over 85% of providers engaged**).
 - **Phase One:** providers awarded **\$20,000-\$30,000** for a **3–6-month** organizational assessment.
 - **Phase Two:** providers awarded up to **\$200,000** to implement the capacity building strategies identified in Phase One.
 - All **7 culturally specific providers** partner agencies have been awarded TA funding
- Projects have included:
 - Business Services
 - Human resources
 - Strategic planning
 - Policies and procedures
 - Program design, development and implementation
 - Evaluation

Consistency in County approaches

- **Leveraging the expertise of culturally specific providers** by adding clause to the initial, Tri-County SHS qualification allowing for culturally specific TA support from culturally specific providers.
- **Creating a channel to access technical assistance** in human resources, finance and more.

Differences in County approaches

- **Consultant contracting approach**

- Clackamas: 4 different consultants available to all providers
- Multnomah: TA accessed through JOHS staff; culturally specific Community Development Grants available
- Washington: Two-tier grant process with choice of consultant

- **Regional differences in need**

- Clackamas: Support smaller number of existing providers and expand culturally specific network
- Multnomah: Support robust, existing network in scaling up and expand culturally specific network
- Washington: Build larger system and offer support with billing compliance, audits, etc.

Metro Housing's *Regional Capacity Team*

Increasing the ability of systems to provide consistent, sustainable and quality services across the tri-county region

Current priorities:

- **Technical assistance** for permanent supportive housing services providers
- Accessible **trainings** for frontline workers

Regional Capacity Team guiding values

Collaboration
with county
partners

Avoiding
duplication

Adding value
to the system

Regionalizing
TA and
training

Shared pool of consultants

- First step toward regional technical assistance
- Collaborative and regional
- RFP: PSH Demonstration and Research Project
- Washington County plans to utilize soon

Strategy

Permanent Supportive Housing
(PSH) Technical Assistance
Demonstration & Research Project



Metro's Permanent Supportive Housing Work

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

Intended outcomes:

- Ensure PSH meets the needs of the person receiving it—help them get housed, stay housed with customized care and tailored services
- Develop personalized housing interventions that meet the needs of clients regardless of their acuity or challenges they may experience
- PSH is provided to clients who need it most
- Help the region reduce chronic homelessness

Permanent Supportive Housing vision

Current state

- PSH implemented according to each county's different expectations with **no regional standards; no guidelines for culturally responsive services**
- **Culturally specific providers know best practices for their communities**; Funders want to see those practices more broadly implemented across all providers
- Some deeply resourced PSH has people with Population B in it, **other less-resourced programs have people who need higher levels of intervention**

Vision state

- Every agency has a menu of TA options that results in:
 - Every participant having the **same quality of trauma informed and culturally affirming care**
 - **Alignment with local and national best practices**, providers helping inform
 - Consistent PSH service delivery and **expectations**
 - Culturally specific providers **inform** culturally responsive guidelines

How does PSH Demonstration Project support the 'vision state' of PSH and the future of technical assistance?

- Core research focus: Learnings inform the creation of regional PSH policy recommendations that center racial equity
 - Prioritizes learnings from culturally-specific organizations to develop equitable service delivery standards
- Learnings inform future opportunities for regionalized TA programming and Metro PSH policy work
- Building a regional TA infrastructure
- Contributions to a new library of TA resources

Purpose: Adding value to the region

- No County PSH TA and no local PSH training outside of OHCS
- Metro policy focus on PSH and has resource dedication.
- PSU Homelessness Research & Action Collaborative culturally-specific PSH provider research project
- OHCS PSH institute is focused on creating **permanent supportive housing development**
- Metro PSH TA is focused on **service delivery for permanent supportive housing**

Racial equity considerations

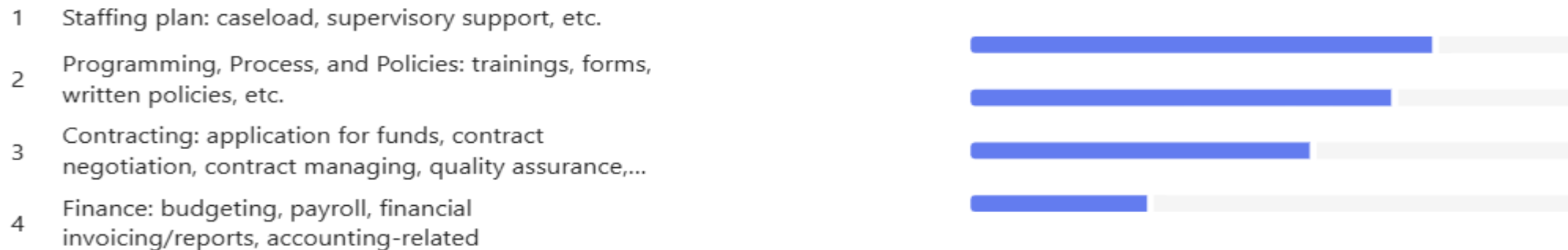
- Intentionally **centering culturally specific providers**
- **Grant program** to compensate staff time (up to \$35,000)
- Consultant RFP evaluation criteria includes points specifically for demonstrating how a **racial equity lens** impacts their work
- **Low-barrier** provider application process
- **Two-way dialogue** for learning outcomes: Research on local culturally specific best practices
- **Supporting** provider/consultant relationship

PSH Survey results

Metro's Regional Capacity Team engaged nearly 200 service providers between October-December (coalition meetings, jurisdictional meetings, 1:1 conversations)

Permanent supportive housing technical assistance survey:

- **19 responses**
- **Strong regional representation**
- **Strong demographic representation**



The image above shows how providers ranked their technical assistance needs from most important to least.

Project timeline highlights (Jan-Sept 2025)

Q2

- Service Providers Engagement
- TA Consultants: anticipated RFP release November 2024 (6 weeks) & selected by March 2025

Q3

- Jan 22, 2025: Service Provider Letter of Intent released & selections by April
- April 2025: Pairing Providers & Consultants, Award TA Consultant contracts & award PSH providers' initial grant

Q4

- April 2025: TA Demonstration Project & Cohort Meeting launch
- Mid-May 2025: pilot targeted TA solutions

Q2/26

- September 30, 2025: TA Demonstration Project close out

Budget proposal (Metro admin funds)

6 months	4 providers
Meetings food (8 cohort mtgs)	\$ 3,888
Honoraria (cohort outside speaker)	\$ 6,000
Materials Translation	\$ 26,250
Interpretation	\$ 24,500
PSH Provider Grant @ \$35,000	\$ 140,000
TA Consultant @ \$53,960	\$ 215,840
<i>*Estimates; may be subject to change based on RFP responses</i>	\$ 416,478

*Budget source: Metro Admin funds, **no Regional Investment Funds (RIF)**; budget subject to change based on RFP contracting process*

Metrics

Metric	Goal
Local and national best practices inform PSH policy development and implementation	<ul style="list-style-type: none">• Pair 4 PSH culturally specific providers with consultants and conduct organizational assessments on PSH• Benchmark organization to nationally outlined best practices while learning best practices from culturally specific providers• Convene and leverage community of practice cohort for deeper learning• All learnings inform Metro's PSH policy work
Technical assistance interventions are measured to influence scaled future implementation	<ul style="list-style-type: none">• All learnings inform Metro's PSH policy work

Results

- **Deliverables**

- Organizational assessment for each agency
- Tailored technical assistance
- Final report measuring success of technical assistance
- Any materials created added to PSH library

- **Scalability for regionalization**

- Findings shared widely regionally
- Expand to other areas of PSH implementation
- Potential to replicate in other areas of technical assistance

Important dates and how to apply

Due date: March 5th by 2:00 p.m.

1st optional information session on Zoom: February 5th at 2:30 p.m.

2nd optional information session on Zoom: February 13th at 10:30 a.m.

Materials currently available in English and Spanish

- Additional translation requests due February 7th by 2:00 p.m.

Organizations can apply by submitting a written response through mail or e-mail or by video submission online.

- A template for written submissions is in the materials folder online, use is optional.

More details are in the online folder. Questions not answered today? Email the team at

MetroHousingRegionalCapacity@oregonmetro.gov

Questions?



Tri-County Planning Body
Technical Assistance Goal
Draft Regional Implementation Strategy

February 2025



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Proposal summary

Capacity building typically involves making strategic investments to help an organization elevate, expand and/or stabilize the work they are already doing (for example, with new or ongoing funding to hire, recruit and retain frontline staff).

Technical assistance (TA) is the process of ensuring nonprofit service providers have access to the tools they need to implement a new strategy, process or system by pairing an agency with tailored support. This support typically involves a nonprofit engaging with a consultant or government/funder staff to implement a process, system or strategy in line with the work the organization is already doing and consistent with the expectations of the funder. This may look like, for example:

- Working with a human resource professional to ensure the agency has robust personnel policies and procedures
- Working with jurisdictional data staff to help implement a new case management system that interfaces with the Homeless Management Information System while effectively tracking client interactions
- Implementing a new financial system to help an agency better fundraise, track expenses and accurately invoice for quick reimbursement

The two areas fit together closely because the expansion that usually results from capacity building generally also requires TA support to help the agency build the systems, policies and procedures to sustain that higher level of service.

The Tri-County Planning Body's TA goal directs Metro and the counties to ensure organizations have access to the tools they need to operate at a high level of organization functionality with the needs of culturally specific providers prioritized through all program design. The recommendation is for Metro and the counties to coordinate and support regional TA and invest in capacity building, especially among culturally specific providers. Further conversations with TCPB members have helped us set the following objectives and principles:

- Identify and **develop a consistent menu of TA options** that are widely accessible across the region for any Supportive Housing Services (SHS) contracted agency to have equitable access to the TA services they need.
- Use this consistent menu of available TA to **develop consistent practices for service delivery** across a region-wide system of care so that a client knows that they will receive the same level of care in Oregon City or Gresham or Hillsboro or downtown Portland.
- **Honor the work service providers have been doing** until now in very challenging circumstances and ensuring that whatever TA opportunities developed and delivered both meet their needs now while helping them move toward the vision of a regionalized system.

That work of **honoring provider expertise is especially important to consider** in developing a new TA program. Unlike their counterparts in healthcare, which are often funded to meet a

specific model¹, homeless service providers often undergo an inverse relationship to receiving government funding. They generally start as grassroots organizations meeting a need, often developing systems and processes that work for their organization but are not necessarily consistent with other agencies in the region. Only when they have proven their value are they generally able to compete for government funding. Therefore, in both recognizing the work providers have done before receiving public funding, and in working toward consistent practices across the region, it is important to start with targeted TA strategies that can be scaled toward regionally consistent practices rather than coming from the top down and requiring major changes.

Moreover, a **central racial equity consideration** overlaying all TA efforts is in ensuring the expertise of culturally specific providers is centered in program implementation. The “best practices” that TA consultants have developed or promote have often been created through a dominant culture lens. There is an opportunity for the region’s TA work to elevate the expertise of culturally specific providers to understand the unique needs of the populations they serve and how those learnings can be replicated and required for every agency serving communities of color across the region.

Since the passage of SHS, each of the counties has been providing capacity building and TA to their service providers to help them scale up, and Metro Housing Department, at the request of Metro Council and the Tri-County Planning Body, has built out a Regional Capacity Team to coordinate and deliver regionally consistent TA to SHS-funded nonprofits.

The major implementation considerations for regionwide TA include:

- Ensuring Metro and the counties are providing services that meet the needs of the region’s providers and those providers are shaping the TA and learning outcomes
- Ensuring that the jurisdictions are not duplicating services and offerings
- Ensuring that the learnings from initial TA programs can be implemented regionwide to result in regionally consistent practices
- Considering the unique needs of providers and the differences in need from providers in different counties

This document outlines:

- The work counties have done to date to provide TA to their frontline service providers
- The collaboration between Metro and the counties in expanding these offerings

¹ An example of this is an Assertive Community Treatment Team or ACT Team, which brings together case managers, psychiatrists and other mental health practitioners to support people with severe and persistent mental illness. It is funded by the healthcare system, which has specific model fidelity requirements and as a result, an ACT Team looks similarly at Cascadia Health, Central City Concern and other agencies.

- Metro’s proposal for the Permanent Supportive Housing (PSH) TA Research and Demonstration Project, which constitutes the central strategy of this plan

The PSH Technical Assistance Research and Demonstration Project, which Metro is developing in close collaboration with our partners at Clackamas, Multnomah and Washington counties, is an intentional opportunity to understand the best and emerging practices providers (especially culturally specific providers) are already implementing in PSH service delivery, where there is consistency and inconsistency in the region’s PSH implementation and how TA can help scale best practices for providers to be able to deliver consistent and quality PSH services across the region.

This project will help the four governments understand roles and responsibilities around these important efforts and is, we believe, an appropriate first step toward regionalizing technical assistance.

How counties have responded to provider TA needs

Recognizing an immediate need for TA to prepare for an expanded service system with the passage of SHS, the counties each launched and have since refined TA support for their frontline providers.

Clackamas County has developed a TA program where they hold “not to exceed” retainer contracts with four TA consultants, funded out of their SHS base budget.

- Each consultant can bill up to \$250,000 per year for four years with a total contract value of up to \$1 million.
- Clackamas County’s SHS providers can access these consultants complimentary as part of their contracts. The consultants will work with the providers to identify and implement TA needs.

Four of Clackamas County’s community-based organizations (CBOs), including two culturally specific organizations, have utilized TA services. These services have supported the creation and finalization of essential documents such as policies and procedures, administrative manuals, grant manuals, and organizational by-laws. Additionally, TA has provided expertise in marketing, fundraising, fiscal business services, human resources, strategic planning, and program design. This support spans the full program lifecycle, including development, implementation, and evaluation.

Oregon City-based agency The Father’s Heart has shared that they loved working with their TA provider. The provider helped them understand funding sources, fully understand contracts and helped them to identify the roles they needed to hire for to become fully functional. After working with them, they have a much clearer understanding of how they will operate moving forward.

In Multnomah County, the Joint Office of Homeless Services (the Joint Office) has developed several avenues for providers to access TA with a focus on ensuring culturally specific providers have access to resources:

- To help currently contracted providers develop reports or understand contracting requirements, Joint Office finance staff and contract managers meet with providers for tailored technical support.
- During RFPQs, the Joint Office hires third party TA consultants to pair with interested providers to help them develop and finalize applications.
- To help with workforce capacity stabilization, the Joint Office partnered with United Way to award \$10 million in allocated to all Joint Office contracted providers based on homeless services FTE to help providers improve provided retention rates and reduce provider vacancy rates. In total, 61 agencies received these grants and have until December 2025 to use them. Somali Empowerment Circle deployed their funding toward professional development work like staff trainings in trauma-informed care. Street Roots used their allocation to bring their vendor program employees up to \$27 an hour. This initial grant program leveraged RIF funds.
- In the last fiscal year, the Joint Office has also launched system development grants, which are awarded to new and emerging culturally specific providers to build their infrastructure capacity. These grants are flexible, allowing the awardees to use the funds in various areas of TA that would support their organization’s capacity most, including human resources, fiscal business practices, strategic planning, policies and procedures and more. The providers could choose how to use these resources, for example, hiring a consultant or purchasing a new software system, so long as they kept to the basic SHS rules of not purchasing a new building or expecting the grant to cover ongoing staffing costs.
- Recognizing culturally specific providers often provide TA to their peers without a contract or compensation, JOHS (and the other two counties), created a specific clause in the SHS tri-county request for qualified providers that allows for culturally specific providers to be awarded contracts for their technical expertise.
- In FY24, through the system development grants, JOHS awarded \$1.115 million to 12 agencies to support their organizational capacity building work.

Washington County has taken an approach of providing capacity building and TA in a two-phase grant process using a combination of SHS base budget and RIF funds.

- In Phase One, providers are awarded grants of between \$20,000 to \$30,000 for a brief, three-to-six-month organizational assessment with a consultant to identify areas the agency could use TA support (human resources, finance and more). Once they’ve received that assessment, the organizations can apply for a Phase Two implementation grant. This was a total of over \$590,000 across fiscal years dedicated to 21 organizations (over 85% of providers engaged).
- In Phase Two, the providers are awarded up to \$200,000 to implement the capacity building strategies identified with the consultants in Phase One. This is a total of over \$3.1 million across fiscal years dedicated to 21 organizations (over 70% of providers engaged).

Washington County continues to award TA and capacity building grants to its service providers as a part of this plan. Four partners are eligible to apply for phase two awards of approximately \$700,000 total.

TA and capacity building projects have ranged from business services, human resources, strategic planning, policies and procedures, program design, development implementation, and evaluation. All seven culturally specific partner agencies have participated and been awarded TA and/or capacity building project funding. Some providers shared the impact of these investments recently:

- “For us, the capacity building funds have been tremendously helpful. We finally have the beginning of a real HR program and serious improvements in our finance and accounting system. I think that the changes will benefit CPAH and Wash. Co. for years to come.”
- “A balance of both TA and capacity building matters. For the former, Homeplate has benefitted from both group trainings and one-on-one support so that staff fully understand program expectations and processes. In fact, Homeplate staff have participated in co-leading trainings. In order for decision makers to connect policy decisions to real outcomes, we need to ensure continued investment in data systems, positions, and ongoing TA.”
- “It helped [Family Promise of Greater Washington County] update our policies and procedures and bring on HR.”

Where there is consistency in all the county approaches:

- Leveraging the expertise of culturally specific providers: In the initial SHS tri-county qualification, the counties added a clause that allows them to contract with culturally specific providers for TA support. This approach allows the counties to learn about best practices from their culturally specific providers and compensate them for their time.
- Each of the counties has developed an avenue for organizations to access TA for basic areas needed for organizational operations, including support for human resources, finance and more.

Where the county approaches differ:

- **Consultant contracting**

As mentioned above, each jurisdiction has a slightly different strategy for how they approach contracting with a consultant and how providers are compensated. In Clackamas County, any contracted provider can access TA from any of four TA providers as part of their SHS contract, whereas in Washington County TA is awarded through a two tier grant process giving the provider a bit more flexibility to choose their TA consultant, and in Multnomah County TA can be accessed through Joint Office staff, or, if a non-contracted culturally specific provider is looking to build capacity toward a contract, they can access services through a Community Development Grant.

These various processes mean that providers would need to take a different approach to receive TA depending on where they are located, which could be especially challenging for providers receiving contracts in multiple counties.

- **Regional differences in needs**

While each county is approaching TA from a shared value of ensuring their providers have access to the best tools they need to do their work, there is a slight difference in philosophy around the ultimate outcome. For example,

- **Multnomah County**, which has a robust continuum of existing and emerging providers, is focusing its TA both on ensuring those providers have the support they need to scale up services and contracts and to develop a new pipeline of providers with a strong focus on supporting emerging culturally specific providers.
- **Clackamas County**, which has historically had a much smaller continuum of providers than the other two counties, is working to ensure their existing providers have the TA support they need while working diligently to help build out their pipeline of culturally specific providers.
- **Washington County**, like Clackamas, is both continuing to build out a larger system with SHS funding while continuing to support their providers to have access to the support and tools they need to ensure they're able to comply with government billing requirements, audits and more.

Regional collaboration on TA to date

Recognizing that providers across the region needed TA to scale their work, Metro Council set a priority in the FY23 budget process to provide TA. The housing department moved forward with developing and launching the Metro Housing Department's Regional Capacity Team to develop programming in response to the TCPB's TA and training goals. The guiding principles of the team are to:

- **Collaborate with county partners:** The Regional Capacity team is focused on ensuring they are working closely with county partners to learn from what is working well, refine their work and use any findings to support a regional system of care and as they scale these offerings up.
- **Avoid duplication:** Rather than create a fourth door to TA in the areas the counties have already been providing, the Regional Capacity team seeks to identify unique opportunities to advance the work of the region's system. This is why as an initial TA project, Metro is focusing on PSH implementation, which none of the counties are offering TA for.
- **Add value to the system:** The team wants to ensure that any work that it implements will be found to be valuable by providers and will lead toward a stronger, regionalized vision of TA.
- **Regionalize TA and training work:** Along with the above-mentioned guiding principles, the team seeks to ensure that any work they do has a regional lens and that what they produce can be accessed by SHS providers anywhere in the region and that it can be consistently replicated across county lines.

This collaborative work led Metro and the counties to work together last fiscal year to develop a **shared pool of consultants** for TA work through a *Request for Qualifications: Capacity Building and Technical Assistance: Housing and Homeless Systems* (RFQu 4269).

Description of RFQu 4269: As mentioned above, TA typically relies on drawing from a pool of expert consultants to support service providers with their specific needs and to help them provide consistent services. By 2024, each of the counties and Metro needed additional consultants to support this work.

One of the first actions of the Regional Capacity team was to launch a first of its kind tri-county and Metro public solicitation. Metro's Regional Capacity team worked in close collaboration with all three counties to develop, finalize and score RFQu 4269 and in total qualified 67 consultant agencies across the following fifteen TA categories:

- Communications
- Community engagement
- Compliance services
- Contract consultation for nonprofits and fiscal management
- Data management, research and evaluation
- Housing and homeless services best practices
- Housing development and asset management
- Human resources
- Information technology
- Organization and Board development
- Program design, development and implementation
- Racial equity and social justice
- Technical writing
- Unit inspectors
- Volunteer management

This joint solicitation means that, for the first time in history, all three counties and Metro can draw from a shared pool of TA consultants.

Timeline: October 2023-July 2024

Status: Complete

Budget: N/A

Racial equity considerations in developing RFQu 4269: Recognizing that the consulting industry can often be white-dominated, and that a core goal for this TA pool was to identify consultants to work with providers, especially culturally specific providers, Metro and the counties worked deliberately to ensure that racial equity was centered in this process, including:

- **Recruiting culturally specific providers and COBID-certified small businesses to apply.** COBID-certified businesses are a key demographic in Metro's broader procurement policies in ensuring

that minority, women, LGBTQ+ and veteran-owned small businesses can compete for government contracts.

- Recognizing that culturally specific providers often provide peer to peer TA consulting, Metro and the counties **developed a series of alternative questions for culturally specific providers** to showcase the work they had done in the past, even if they had not received a previous contract from it. These alternative questions were based off a series of questions the Joint Office had developed.
- **Implemented a stipend process** for non-government employees so that service providers could participate in the evaluation of qualifications.

As a result of these efforts, 68 consultants qualified, including:

- 7 (10%) that are culturally specific service providers
- 21 (30%) that are COBID-certified
- 19 (27%) that are minority or Black, Indigenous, or Person of Color owned/lead
- 33 (47%) that are women-owned/led
- 14 (20%) that are LGBTQ+ owned/led

Metrics

Metric	Goal	Result
Collaborative development of TA pool	Counties and Metro work together to develop TA categories and questions, launch and score procurement	-First ever tri-county and Metro qualification pool -68 TA consultants qualified to apply for funding in 15 areas of TA
Jurisdictional use of qualified consultants	All jurisdictions leverage TA pool in their TA delivery	-Metro is using this pool of TA consultants to support the PSH TA Research and Demonstration Project. -Washington County is considering using this pool for a technical evaluation of the recuperative care pilot at the Hillsboro Bridge Shelter (known as the “Low Acuity Treatment Services.”

		<p>-While neither Clackamas nor Multnomah County have directly used the RFQu pool to date, both counties are looking for opportunities to do so in the future.</p>
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Regional TA strategy: Metro Permanent Supportive Housing Technical Assistance Demonstration and Research Project

Program Description:

Successful implementation of PSH is the key to ensuring the success of the SHS measure. While national best practices for PSH have been developed, there are currently no regional standards to define how PSH should be implemented from agency to agency. For example, there is no standardized guidance that tells agencies how many staff should be supporting a PSH building at any time, there are no consistent requirements for PSH case management ratios and there are likely clients who are receiving PSH services who may have lower and/or shorter-term service needs than clients who typically are prioritized for PSH programs. Identifying and developing solutions for these gaps to ensure a consistent level of care for PSH delivery across the region is a key strategy of Metro’s regional policy work on PSH, and this project will directly inform that work.

The PSH TA Demonstration and Research Project aims to pair four PSH service providers with TA consultants to:

- Identify local best and/or emerging practices in delivering PSH, especially in supporting clients of color
- Benchmark their current services to national best practices
- Inform Metro’s ongoing regional policy work around PSH implementation to ensure a consistent level for delivery of PSH across the region
- Help Metro internally develop a framework for providing TA and identify opportunities for future, regional TA implementation
- Inform Metro and the counties on the roles and responsibilities each jurisdiction can play in delivering TA

Research is a core value in this project, both in identifying what TA interventions are helpful for implementing PSH at a consistent level of care across the region, and in understanding the ways that service providers, especially culturally specific providers, support the unique needs of their clients.

The learnings from this project will play a key role in helping Metro and the counties identify ways that TA can be scaled regionally, and in serving clients of color in ways that are culturally affirming and

trauma informed. These learnings will be shared with the TCPB throughout the project and will be used to inform future TA offerings.

Racial equity considerations:

Racial equity is being prioritized in the project by design, and the Racial Equity Lens Tool that Metro’s project team applied to this project (the Joint Office RELT) can be reviewed in Appendix A.

The project aims to understand the strengths and needs of culturally specific provider organizations, as well as the best practices for providing PSH services to clients of color by prioritizing three culturally specific providers and one dominant culture provider providing culturally responsive services with representation from each county. Metro is centering racial equity in this project by being culturally responsive in our approach to work working with providers and committing to applying a racial equity lens throughout the project. A central tenet of this goal is ensuring that if Metro and/or our county partners are going to expand this program to include more TA offerings, then Metro starts the process by understanding the needs of culturally specific providers and then developing a larger program based around those needs.

The Regional Capacity team has worked closely with county partners and culturally specific providers to refine the project and make improvements to ensure it aligns with best practices for engaging culturally specific providers. Some of these considerations have included:

- **Creating a grant program** of up to \$35,000 to ensure that providers who participate in this project can compensate staff time and implement TA strategies.
- **Intentionally centering culturally specific providers** in the implementation of this demonstration and research project by reserving space for three culturally specific providers (of four providers total). As Metro considers building a broader TA program based on the results of this project, we aim to shift away from the typical paradigm of government creating a program that best serves dominant culture providers.
- **Intentionally creating a two-way dialogue for learning outcomes:** This project intends to test benchmarking the work of local culturally specific service providers to PSH national best practices as defined by HUD, Corporation for Supportive Housing, SAMHSA and others. “Best practices” can often be shorthand for practices that work well for white clients or dominant culture agencies, effectively silencing critical emerging practices and needs for communities of color or their culturally specific providers. Moreover, there is little research that is specific to the needs of each of the communities of color within PSH. This project, which will inform the SHS program’s regionwide PSH operational standards of practice, intends to learn from local, culturally specific providers what types of support they’re providing to serve their communities effectively. In creating a dialogue, Metro hopes to leverage the work culturally specific providers are doing to support their communities and create a regional baseline of expectations for the level of care for all clients, especially those who are marginalized.

- Metro playing a strong role in the provider/consultant relationship:** Typically, in a project like this, clients and consultants are paired and provide a report of their findings and work at the conclusion. Metro plans to play a more active role in the provider client relationship in this project, including regular check-ins, mediation when necessary, and coordinating a community of practice cohort. On top of the learnings already mentioned, a primary goal of this more active role is to help ameliorate potential harm that may arise from a dominant culture consultant working with a culturally specific provider.

Timeline and Milestones

Milestones will be shared in the TCPB’s monthly progress report.

It is anticipated that the items listed in the chart below will be completed by December 2025, including results and next steps, which will include recommendations on how Metro may scale this type of TA or identify additional pathways to providing TA in PSH or other areas.

Phase	Deliverables	Details/Steps	Responsible Party	Expected Completion
Pre-Planning	Develop framework for all aspects of TA demonstration and research project	1. Develop and launch RFP for providers qualified through RFQu 4269 pool 2. Conduct county and PSH provider outreach to generate interest and refine program 3. Develop framework for provider participation, including LOI process and \$35,000 grant 4. Develop framework for all provider/consultant deliverables, including organizational assessment and community of practice	Metro	Q2 FY25 (Dec 2024)
	Select and pair TA consultant and PSH providers participating in the project	5. Launch and score consultant RFP, and contract with up to four consultants to work with providers 6. Launch and score provider LOI identifying four providers to participate with a goal of majority culturally specific		Q3 FY25 (Mar 2025)

		<p>and one provider from each county</p> <p>7. Pair consultants with providers to start the project</p>		
1	<p>TA consultants and PSH providers begin working together to complete an organizational analysis on providers' PSH service delivery</p> <p>Launch Community of Practice Cohort</p>	<p>1. TA consultant conducts and completes organizational analysis using Metro's template framework</p> <p>2. From the organizational analysis results, TA consultant creates a proposed plan with recommendations to identify one to three "low hanging fruit" TA strategies to implement in project phase two.</p> <p>3. Metro hosts monthly community of practice cohort</p>	Contracted consultants and providers (Metro)	Q4 FY25 (Jun 2025)
2	Pilot and measure TA interventions as identified in organizational analysis	<p>1. From the proposed plan, consultant and provider implements the agreed-upon TA strategies, measures impact and results, and reports to Metro.</p> <p>2. Metro staff remains in regular contact with counties to share results and engage in feedback</p> <p>3. Metro continues hosting monthly community of practice cohort</p>	Contracted consultants and providers (Metro)	Q1 FY26 (Sept 2025)
Post-planning	Assess results; identify possibilities of scaling	<p>1. Receive, analyze and assess all reports from consultants</p> <p>2. Identify opportunities to expand TA support, including other areas of PSH best practices</p> <p>3. Report results to TCPB and other invested parties</p>	Metro, County PSH staff	Q2 FY26 (Nov/Dec 2025)

		4. Integrate learnings into PSH policy recommendations		
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Final project deliverables will include:

- An organizational assessment for each agency, which will benchmark their PSH implementation to national best practices, identify how their culturally specific services can be replicated as best practices throughout the region and will include an assessment of TA strategies that the agency might benefit from.
- Tailored, TA support between the service provider and consultant.
- A final consultant report on the TA implementation, measuring its success.
- Any materials created along the way, which will be retained by Metro as part of a larger PSH library to inform future PSH work.

Budget

Description	Cost
Consultant services (four PSH consultants working with providers)	\$215,840
Provider grant (a grant of up to \$35,000 per participating organization to cover costs associated with participation and TA strategies)	\$140,000
Additional costs (e.g. materials translation, interpretation services, honoraria funding for cohort meetings)	\$60,638
Total	\$416,478

Note: This budget is being provided by Metro’s administrative funds and does NOT require RIF approval; budget subject to change based on RFP contracting processes

Metrics

Metric	Goal
Local and national best practices inform PSH policy development and implementation	<p>Pair four PSH culturally specific PSH providers with up to four consultants to conduct organizational assessment of PSH implementation</p> <p>Benchmark organization to nationally outlined best practices while learning best practices from culturally specific providers</p> <p>Convene and leverage community of practice cohort for deeper learning</p> <p>All learnings inform Metro’s PSH policy work</p>

TA interventions are measured to influence scaled future implementation	All learnings inform Metro's PSH policy work
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Appendix A—Racial Equity Lens Considerations for PSH Technical Assistance Demonstration and Research Project

Metro Housing Department’s Regional Capacity team completed an equity lens analysis for the Permanent Supportive Housing Technical Assistance Demonstration and Research project using the racial equity lens tool (RELT) developed by Multnomah County’s Joint Office of Homeless Services. We felt this tool was the most comprehensive tool of those available and aligned closely with the project given that it is focused on supporting direct service providers.

Data and Historic Experience:

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

These data sources informed the Tri-County Planning Body Technical Assistance Goal Draft Regional Implementation Strategy, and will inform its implementation:

- Supportive Housing Services (SHS) annual reports from Clackamas, Multnomah and Washington Counties
- Conversations with Permanent Supportive Housing lead staff at all three counties
- Outreach, presentations and conversations with nearly 200 homeless service providers between September and December 2024
- Results from a PSH the technical assistance (TA) survey completed by the PSH providers in the region (see Appendix B)
- Conversations with Portland State University’s Homelessness Research & Action Collaborative

The annual reports and ongoing conversation with counties also provided data on existing TA strategies and support the counties offer to their providers – which, recognizing that no county is providing TA for PSH, is how Metro decided to move forward with PSH technical assistance support.

It is also important to flag that in greater Portland there has been no completed research data on how to best provide culturally specific or culturally responsive PSH services though PSU’s Homeless Research and Action Collaborative is conducting research in this area and the project team is communicating with them. There is also very little data nationally on how to support people of color and people with intersecting identities in PSH.

Through the PSH TA Demonstration and Research project, from both the TA consultant work with the PSH providers and from the cohort’s community of practice learning, Metro will continue collecting data on what service providers are looking for, what they want and need to be successful to support their clients more holistically. This focus is intended to help identify best practices that the region’s culturally specific providers are already implementing to eventually elevate those best practices in PSH delivery across the region. The project also aims to collect sample demographic data from the project participants, populations of clients served and caseworkers, and narratives on how successful their PSH

service delivery is or how it can improve, especially around culturally specific or culturally responsive services.

Strategies for Racial Equity:

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

The PSH TA Demonstration and Research project proposal intends to benefit clients receiving permanent supportive housing services and the four PSH service providers participating in the project with a specific focus on those who receive/provide culturally specific services. At the current stage of the project, it has not yet been identified which specific communities and groups are represented or unrepresented. Longer term, identifying best practices for communities of color in PSH could strengthen the way all PSH providers are supporting clients of color throughout the region.

Providers may experience a burden due to capacity issues during the application process or project implementation. In response they might use unpaid hours working outside of their normal work duties to fulfill project expectations. They may face language barriers or other access needs or experience unintended racial harm as a culturally specific provider working with a white-dominant consultant and/or local government, etc.

Strategies implemented to mitigate these potential burdens and areas of harm include:

- Expansion of the participating PSH providers group to include one dominant culture agency with the three culturally specific agencies
- Inviting speakers to the community of practice cohort from different culturally specific organizations who are not represented in the cohort
- Creating a low-barrier application process
- Building a project budget to include translation and interpretation services throughout the project while leveraging a language bank for ease of access.
- Awarding grants of up to \$35,000 to participating PSH providers to compensate for their staff time
- Elevate culturally specific PSH providers' experience and best practices throughout the project
- Being culturally responsive by emphasizing flexibility and a clear racial equity focus throughout different aspects of the project: Request for Proposals to select consultant for the project, community engagement, and other ongoing program development.

Nonprofit agencies without SHS contracts will also experience disparities related to this project. Due to the nature of the provider grant, providers without an active SHS contract for PSH or the Housing Case

Management Services program are not able to apply to participate in the project. Metro will continue to reassess future opportunities to address this disparity.

Community and Invested Party Engagement and Input:

How have communities and invested parties been engaged? What is the objective of the engagement? What opportunities exist to expand or enhance community/stakeholder engagement and input?

PSH staff and PSH service providers from all three counties have been engaged in the development of the demonstration project through outreach meetings with coalitions, SHS advisory bodies and more. Metro staff also intentionally met one-on-one with culturally specific PSH providers who weren't at other outreach meetings to incorporate their feedback and gauge interest in the project. As part of this outreach effort, Metro conducted a survey to understand TA needs and priorities amongst the region's PSH providers. From October 2024 through January 2025, Metro staff engaged with nearly 200 providers.

Outreach and engagement with PSH providers and county partners will continue to be a priority as the project launches in order to inform understanding and policy recommendations for regional TA and PSH service delivery best practices.

In a future project iteration, the Community of Practice learning cohort – a primary component of the project – has the opportunity to expand to other PSH service providers in the region who didn't participate in the TA Demonstration project.

Barriers:

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

The first systemic barrier for this project was sizing. The initial draft plan was to select three service providers to participate in the project, all three being culturally specific and representing all three counties. With the small number of providers in the project, it would be difficult to draw meaningful conclusions and learnings from the project. It was recommended to expand the project to more providers or open up the community of practice to more providers.

Other systemic barriers were also identified: members of impacted communities not informing this work; differing definitions of PSH and PSH best practices among funders, providers, and TA consultants; TA consultant's lack of racial equity considerations while working with culturally specific providers; concern about this project being a sporadic one-off investment instead of one planned with rigor and that has a regional focus.

Draft Plan Revision:

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

Based on this discussion, the group agreed on several changes to the original project proposal:

- **Expand the TA cohort to four PSH providers and up to four TA consultant pairings.** The four participating providers will expand the ability to gather more learnings for the project. The ideal cohort will include providers from three counties with varying experience in providing PSH and culturally specific PSH services with three culturally specific providers and one dominant culture provider. Increase project budget to accommodate the additional pairing.
- **Incorporate racial equity considerations throughout the project.** Metro commits to applying a racial equity lens throughout the project and to being culturally responsive to the needs of providers.
- **Incorporate racial equity considerations as a requirement in the consultant work.** The TA consultant RFP and organizational analysis framework will include questions to ensure consultants are meaningfully implementing racial equity considerations throughout their work. Metro project manager will also provide ongoing check ins with consultants and providers and provide support to mitigate racial harm that may arise.
- **Create a low-barrier and accessible provider application process.** Create a low-barrier application process with an optional response and alternative application method (video response). Provide clear questions with scoring guidance and selection criteria. Provide Spanish translation for the project application process and in other languages as requested.
- **Explore TA support for providers to write Letter of Inquiry (LOI) application.** Metro will host information sessions with providers to give guidance and answer questions they have to apply for the project. Though technical writing TA via Metro's procurement department is not available, the Regional Capacity Team will provide support through informal Q&A via information sessions or emails.
- **Outreach to culturally specific PSH providers.** Continue outreach to culturally specific providers, from project development through the LOI application process. Assess applicant pool and add more intentional outreach to culturally specific providers during the LOI application window.

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

- **Assess/re-assess providers capacity:** Work closely with PSH providers and TA consultant to assess if participation in the project draws more hours from front-line staff than anticipated.

This RELT analysis included suggestions and recommendations which are not feasible at this juncture but will be considered during future reiteration of the TA work.

- **Expand the community of practice cohort to all PSH Providers in the region.**

Implementation:

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

Metro housing department's Regional Capacity team will be responsible for the implementation and contract management of the demonstration project, with consultation from Metro PSH Lead, and in collaboration with the three counties PSH leads. There is also an opportunity for Metro internal learning about holding contracts with TA consultants working directly with the providers.

Metro, in partnership with the three counties, will hold responsibility for leadership, convening, communication, regional alignment, and ensuring timelines and outcomes are met. There will be regular opportunities for evaluation, pivoting, and learning throughout the project through check-ins with providers, TA consultants, cohort meetings, or reports. Throughout the project, Metro will provide updates and reports from the cohort to the county partners for mutual learning, regionalizing TA, and implementing recommendations into actions.

Appendix B—Provider PSH Survey results

Appendix B: Permanent Supportive Housing Providers Technical Assistance Survey Results
January 2025

Overview

Metro housing department’s Regional Capacity team conducted a survey between October 2024 and January 2025 amongst the region’s Permanent Supportive Housing (PSH) providers. The survey focused on identifying the technical assistance (TA) needs providers have and the areas where they are successful in delivering PSH.

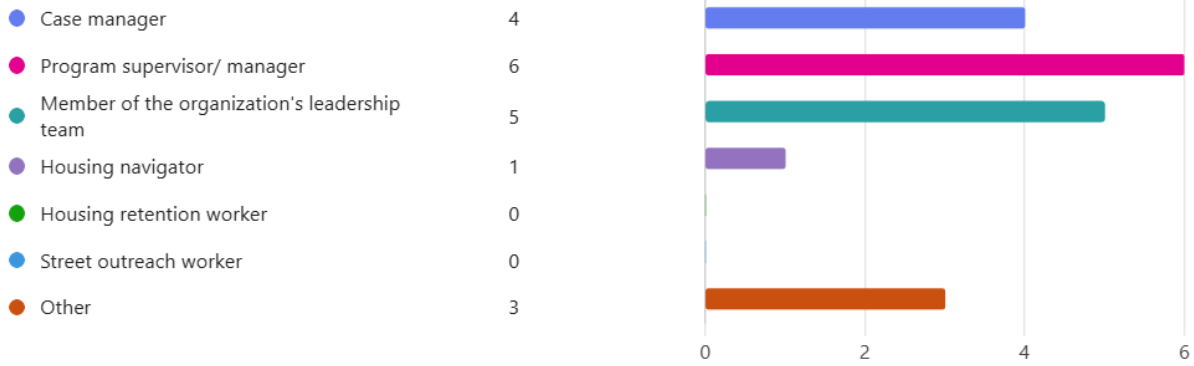
This document outlines:

- **Outreach and engagement:** An overview of the providers who responded to the survey and the populations they serve in PSH as well as the survey outreach process.
- **Provider rank of needs:** The TA providers identified as needing to succeed in their work.
- **Defining success:** Providers identified what is currently working for them on a day-to-day basis.
- **Elevating challenges:** Providers identified the barriers they are experiencing in implementing PSH.
- **How providers serve BIPOC clients** and the ways they have unique needs from the white. clients as well as the clients with intersectional identities who they believe need additional support.
- **Additional TA needs beyond PSH**

Outreach and engagement

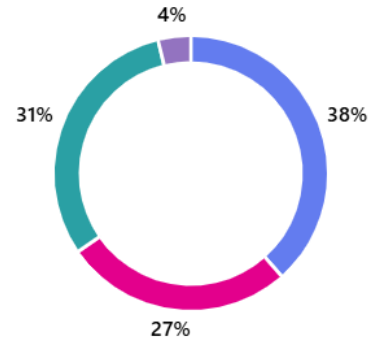
In the fall of 2024, the Regional Capacity team engaged with nearly 200 providers by presenting at various coalition and county SHS advisory committee meetings. The survey was shared during these meetings and circulated afterward to participants and others on coalition mailing lists. In total, 19 different providers responded to the survey. The Regional Capacity Team recognizes that this is a small sample size, however, there is diverse representation within this sample, with representation from each county, various staff roles at PSH agencies and various types of PSH providers.

In the survey the Regional Capacity team heard from program managers, case managers, executive directors, housing navigators and more. The breakdown can be found below. Other respondents included resident leads of PSH sites, leadership, and Housing Specialists.



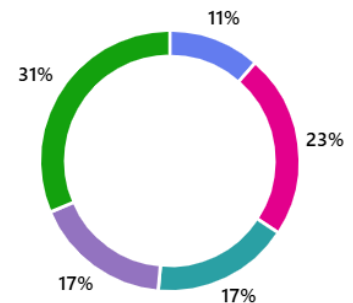
There was geographic representation with providers from all three counties participating in the survey-- 38 percent being from Clackamas County, 27 percent from Multnomah County and 31 percent from Washington County. There were four participants who marked that they serve clients in more than one county. See the graphic below for a numeric breakdown.

Clackamas County	10
Multnomah County	7
Washington County	8
Other	1



Survey respondents were asked to identify what type of PSH they delivered. 31 percent responded they worked on a scattered site model, 23 percent work for culturally responsive agencies, 17 percent of participants deliver PSH at a single site development (all units are PSH) while another 17 percent work at integrated sites (units with some PSH in them), 11 percent of respondents work for a culturally specific agency. See the graphic below for a numeric breakdown.

I work for a culturally specific provider	4
I work for a culturally responsive provider	8
We deliver PSH at one or more 100% PSH (single site) housing sites.	6
We deliver PSH at housing sites that have PSH units in them (integrated)	6
We deliver PSH at many different PSH units in different locations (scattered site)	11

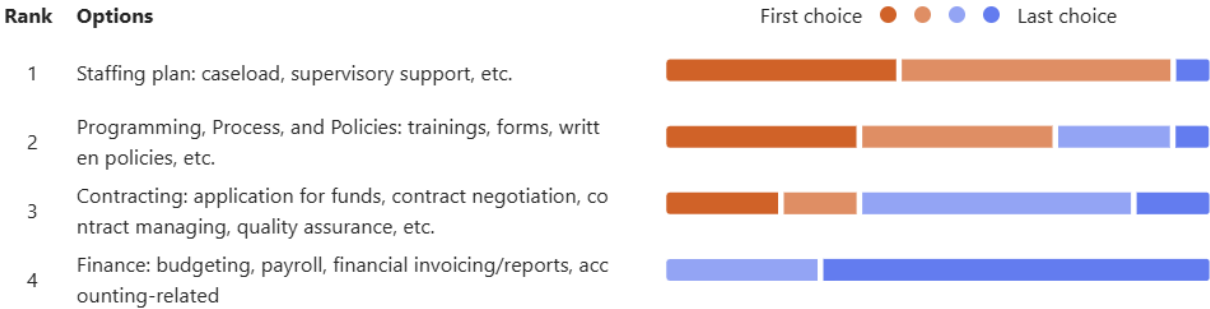


Providers also identified the clientele they support with their PSH programs at their organization. The image below is a word cloud that shows what providers often mentioned when they thought of their successes, FAMILIES being the largest word as it was mentioned the most.



Provider rank of needs

In this section, providers were asked to rank from a pre-populated list what they believed to be the most important resources for their organization to better provide a high quality permanent supportive housing program. The graph below highlights their responses.



Themes:

- **Staffing plan and programming were ranked as the highest areas of need for many of the providers.** Six providers ranked staffing planning first with programming as their second choice, and five providers ranked programming first with staffing plan as their second option.
- **Contracting and finance were ranked as lower stake priorities.** Three providers ranked contracting as their first option while finance was ranked third or fourth for all providers.

What does success look like to providers

The PSH providers highlighted their successes in delivering PSH. Some of the common themes were client-centered approach, managerial/colleague support, making comprehensive connections with community-based organizations, and housing people. The image below is a word cloud that shows what providers often mentioned when they thought of their successes, HOUSING being the largest as it was mentioned the most.



Themes:

- **Housing people** is one of the first steps to making sure someone can begin to get their needs met. Many providers mentioned meeting physical needs is the first step to meeting physiological needs.
- **Making connections with community-based organizations** has allowed providers to meet the needs of clients who may need peer to peer support or resources outside of the program that are specific to them.
- **Assertive engagement with participants in the program** to make sure that clients are getting the hands-on support they need, when necessary, from providers. The providers stated this helps with retention.
- **Housing first methods** have been successful for several organizations.
- **Holistic services** that focus not only on a person getting into housing but keeping them in housing by meeting other needs such as benefits navigation, mental health, and providing specific programming for different groups of people (e.g. seniors and youth).
- **Client-Centered approaches** allow an individual to have a care plan that empowers residents to set and achieve personal goals which helps with autonomy and housing retention.

What is challenging for providers

The providers also highlighted some of the challenges they face when doing their work. Some of the themes shared were not enough funding, not enough housing, lack of mental health or addiction services, staffing, autonomy vs assertive support, and high need clients. The image below is a word cloud that shows what providers often mentioned when they thought of their challenges, HOUSING being the largest as it was mentioned the most.



Themes:

- **Not enough funding** available as operating expenses increase with more properties and more clients to serve.
- **Third party relationships** are often difficult because of a contradiction between goals, approaches, roles, and procedures. The relationship between builders and property managers can be strained.
- **Landlord/Tenant rights** balance is difficult under the housing first model. Providers often try to give their residents autonomy while also using assertive engagement practices with them so they can stay successfully housed. Building relationships with landlords also proves difficult but incredibly necessary.
- **High staff turnover** as well as not enough diverse staff to reflect the clients they are serving, especially for communities of color.
- **High need clients** who can't get everything they need within some of these programs because the programs do not have the trained staff to support them. Some examples were mental health and addiction services, aging and disability services, and other complex medical needs.

Specific needs for clients of color

Providers also highlighted what they noticed about how their BIPOC clients' needs may differ from their white counterparts. Many note the need for culturally specific/responsive services, access to resources, support networks, and system support. The image below is a word cloud that shows what providers often mentioned when they thought of their BIPOC clientele, CULTURAL, being the largest as it was mentioned the most.



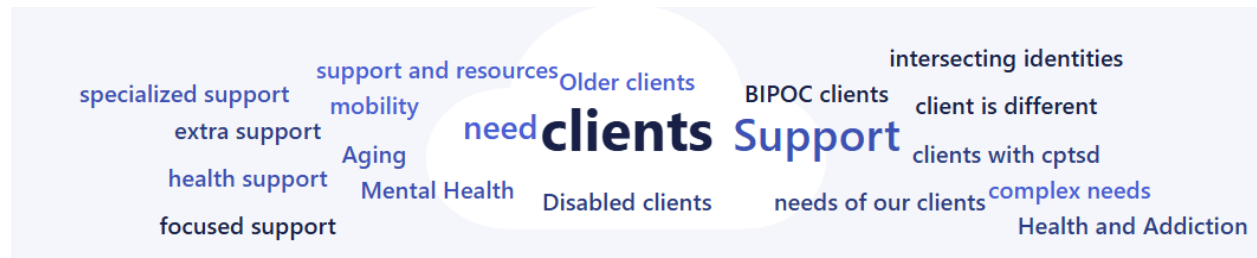
Themes:

- **Culturally specific in nature.** Many of the providers noted that BIPOC clients may need support that is sensitive to their cultural backgrounds and experiences. A few things staff noted were that BIPOC residents need tailored support based on unique needs such as financial literacy, advocacy support, diverse and representative staff, and community partnerships.
- **Recognize systemic issues.** Providers acknowledged the systemic distrust that their BIPOC clients have of government institutions. They also recognize this systemic distrust means they need to have transparency, reassurance and safety. This also goes past housing into their resources, employment, etc.

- **Discrimination** from landlords or neighbors which can look like higher levels of surveillance.
- **Representative staff** that can recognize what clients are feeling/going through on a deeper level or even able to understand their specific language/ can break down jargony language into something more digestible.
- **Culturally responsive training** is necessary for providers across the system, especially dominant culture providers.

Serving clients with diverse needs

Considering the intersectional identities of their clients, the providers noted that some clients may need more intentional attention and support. Many noted that specialized support for older clients, BIPOC clients, and clients with complex needs such as mental health and addiction would be necessary. The image below is a word cloud that shows what providers often mentioned when they thought of their diverse clientele, CLIENTS, being the largest as it was mentioned the most.



Intersectional demographics that providers noted need additional support to succeed in PSH :

- **BIPOC clients**
- **LGBTQIA2S+ clients**
- **Domestic violence survivors**
- **Disabled clients with medical issues**
- **Clients with complex mental health and substance recovery needs**
- **No one size fits all.** This was a consistent theme where providers felt that there is not a program that perfectly fits any client they serve. It really depends on each client's needs and goals for themselves.

Additional considerations

Providers were then asked if there was anything else regarding PSH and their organization that they would like to share. Providers mentioned needing things such as stability in their organization, peer support groups, and increased funding. The image below is a word cloud that shows what providers often mentioned when they thought of their PSH program needs, SUPPORT, being the largest as it was mentioned the most.



Themes:

- **Funding** was mentioned in almost every response. Providers say they need this funding for increased staffing, to bring in experts on behavioral health, and to create a livable wage.
- **Safety** was mentioned for both clients and staff, citing that due to high staff turnover and being chronically understaff clients are sometimes written off by providers and providers are disregarded by clients due to tension in these relationships.
- **Stability in the organization** was mentioned. If providers can pay livable wages, have a reasonable operations budget, and higher staff to resident ratio then providers can be more hands on and drive for better outcomes and stability for clients.

Additional TA needs

Lastly, providers were asked to provide some more details on TA areas or needs that they thought were missing. Providers mentioned needing different formats of training, HMIS/data training, and more provider voices included in leadership and decision making. The image below is a word cloud that shows what providers often mentioned when they thought of the missing pieces for TA, STAFF, being the largest as it was mentioned the most.



Themes:

- **How to use different software** such as Microsoft office, Power BI (data visualization), Tableau, etc.
- **HMIS** is not user friendly, finding a way to make data digestible, attainable, and easier to track.
- **PSH** is more than TA and training. Providers need to be able to put into practice what they believe and were trained to do.
- **Introductory courses** for staff who are new to PSH programs.

METRO SUPPORTIVE HOUSING SERVICES TRI-COUNTY PLANNING BODY

Monthly progress report | February 2025

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

Tri-County Planning Body regional goals*

Goal	Progress
<i>Regional Landlord Recruitment</i>	<i>Metro and county staff are continuing to coordinate on the implementation of strategies in the Regional Landlord Recruitment Regional Implementation Plan adopted by the TCPB, including meeting monthly in the Regional Landlord Recruitment Workgroup. As part of the Plan's Strategy #1: Communication and education plan, Metro have created a webpage on Metro's website with information on county landlord financial incentives. Metro will be working with a consultant on work related to Strategy #2: Align financial incentives and Strategy #5: Investigate needs for property management. TCPB will receive a progress report presentation on this goal area at January's TCPB meeting.</i>
<i>Coordinated Entry</i>	<i>The CE Regional Implementation Plan (CERIP) was approved by the TCPB on 10/9/24 and by Supportive Housing Services Oversight Committee (SHSOC) on 10/28/24. Work on the four strategies outlined in the CERIP (Regionalize visibility of participant data, align assessment questions, regionalize approaches to prioritization for racial equity, regionalize approach to case conferencing) has begun.</i>
<i>Healthcare system alignment</i>	<i>The regional planning workgroup (Health Share, counties, and Metro, with support from Homebase) is close to finalizing the implementation plan with a focus on regional opportunities to support, supplement, and advance existing health and housing system alignment initiatives. The implementation plan presentation has been rescheduled to come to TCPB in March 2025. The team will provide an</i>

update to the SHS OC in January and present the plan for OC approval following approval by the TCPB. A healthcare/housing data integration workgroup continues to meet, learning from existing data sharing agreements (DSAs) across the region to discuss regional health/housing data sharing infrastructure and scope for the regional plan.

Training

Metro and the counties continue to collaborate on the training goal. In early January, the Regional Capacity Team will be launching a pilot project to assess the effectiveness, value and regional scalability of the on-demand trainings available through National Alliance to End Homelessness and Corporation for Supportive Housing. In total, two staff at up to 10 agencies will take seven training courses and share their feedback to inform future implementation for Metro and the counties.

The team is also continuing research into various pathways for centralized training or a certification for frontline housing and homeless service workers to inform potential implementation pathways. We plan to have a final version of that paper ready with our next TCPB presentation in April. We continue to gather provider feedback on this project, specifically the potential course descriptions, through a widely shared survey and one to one conversation, the results of which will be incorporated into the research paper and implementation strategies.

Technical Assistance

The Permanent Supportive Housing Technical Assistance Research and Demonstration project, which aims to learn best practices in PSH delivery from culturally specific providers and identify opportunities for regionalizing technical assistance, continues to move forward. RFP 4406, which will form the basis of technical assistance providers for this project closes next month and in January, the team plans to launch an LOI process to identify the providers who will participate with the intention of

having providers from all three counties, the majority of whom are culturally specific providers. Metro staff is also finalizing the grant process to support providers that participate with staff time and implementation of technical assistance strategies they identify with the consultant.

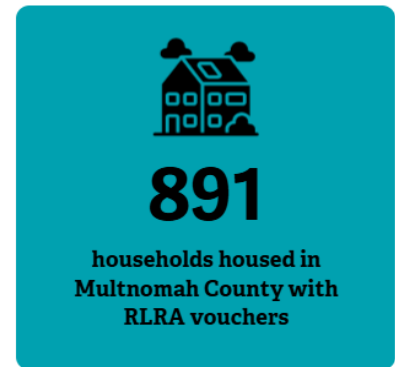
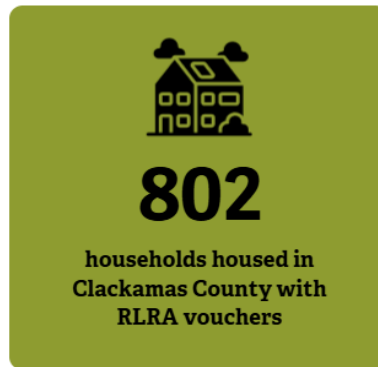
Employee Recruitment and Retention

We are meeting monthly with a tri-county workgroup to draft a regional plan, reviewing concepts discussed in the June/July 2024 progress updates and exploring opportunities to develop regional approaches to contract policies, capacity building, and other areas, building on existing efforts in each county. The Regional Implementation Plan is currently scheduled to come to TCPB in May 2025.

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

Existing REGIONAL PROGRAMS AND COORDINATION EFFORTS

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



The data comes from the SHS quarterly reports, which includes disaggregated data (by race and ethnicity, disability status and gender identity) and can be accessed here:

<https://www.oregonmetro.gov/public-projects/supportive-housing-services/progress>

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

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

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

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

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

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

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

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

TRI-COUNTY PLANNING BODY GOAL AND RECOMMENDATION LANGUAGE

May 10th, 2023

COORDINATED ENTRY

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

REGIONAL LANDLORD RECRUITMENT

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

HEALTHCARE SYSTEM ALIGNMENT

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

TRAINING

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

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

TECHNICAL ASSISTANCE

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

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

EMPLOYEE RECRUITMENT AND RETENTION

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

Recommendations: Map current wage and benefit conditions.

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

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

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

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

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



Supportive Housing Services Oversight Committee Meeting Summary

Meeting: Supportive Housing Services (SHS) Oversight Committee Meeting
Date: December 2, 2024
Time: 9:30 a.m. to 12:00 p.m.
Place: Virtual meeting (Zoom)
Purpose: Metro tax collection and disbursement update, housing funding update, discuss committee reflection and questions on county FY24 annual reports.

Member attendees

Co-chair Mike Savara (he/him), Peter Rosenblatt (he/him), Carter MacNichol (he/him), Felicita Monteblanco (she/her), Jeremiah Rigsby (he/him), Margarita Solis Ruiz (she/her), Dan Fowler (he/him), Mitch Chilcott (he/him), Dr. James (Jim) Bane (he/him)

Absent members

Co-Chair Dr. Mandrill Taylor (he/him), Jenny Lee (she/her), Cara Hash (she/her), Kai Laing (he/him)

Elected delegates

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

Absent elected delegates

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

Metro

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

Kearns & West Facilitator

Josh Mahar (he/him)

Welcome and Introductions

Co-chair Mike Savara provided opening remarks.

Ben Duncan, Kearns & West, shared that he will no longer be facilitating this group, and reflected on the Committee's valuable work and efforts over the past few years.

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

Yesenia Delgado, Metro, stated that there are two meetings this month and that Jeremiah and Mike have agreed to stay on the Committee for another term.

The Committee approved the October 28 and November 4 meeting summaries.

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Conflict of Interest Declaration

Peter Rosenblatt declared that he works at Northwest Housing Alternatives, which receives SHS funding for services and may receive additional SHS funds for housing developments.

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

Margarita Solis Ruiz declared that she works at Bienestar which receives SHS funding.

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

Public Comment

No public comment was received.

Housing Funding Update

Val Galstad, Metro, (they/them) shared that Metro Council has continued to consider reforms and revisions to the SHS program including asking voters to expand allowable uses of SHS funding to include affordable housing production, preservation, and acquisition; governance model reforms; and funding model reforms. They stated that since the last update the Committee received, Metro Council had conversations on a proposed allocation model and that Metro Council will discuss governance models later this week. They reviewed the process timeline, noting that Metro Council will discuss the measure ordinance language on December 15 and that the Council may make decisions in January.

Committee members had the following questions and comments:

- **Question, Dan:** Can we get a copy of the meeting minutes and the proposed allocation models from the Metro Council meeting? Can we get a summary of public comments on this process? I am worried about timing. December is the worst time to push something new. When I hear there will be meetings in December, and the Council may make decisions in January, the process feels rushed and ill-informed. Do you want to rush this, or get this right?
 - **Metro response, Val:** We will share those materials with this Committee. Synthesizing public comments can take time. The Council is moving quickly as they are feeling urgency from their constituents.
- **Comment, Washington County Chair Kathryn Harrington:** The Council has been discussing this through work sessions, so there are no public comments, except for the meeting where they passed the resolution in October. It seems to me that there will be a ballot measure, there will be a tax cut, there will be governance changes, and the revenue level for counties will decrease. Counties are on this journey whether we like it or not. Washington County has sent letters and has not received a response.
- **Question, Carter MacNichol:** I do not understand the urgency, I would like to understand that better. I would mirror everything Dan said. We have been told for the last three years that it takes three to five years to build a program and understand what the long-term goals are, and now we are about to take funds away from services. I think the timing is ill-advised. I would be curious to see the public opinion research and how the questions were asked as the public likely does not understand the nuances.
 - **Metro response, Val:** The original impetus for Metro was thinking about how to address the affordable housing funding cliff. The public opinion research indicated a

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strong desire from voters for affordable housing to be an allowable use and that a bond is not viable. We can share the public opinion research that was completed in June and can share the current research underway once it is complete and analyzed.

- **Question, Peter:** It is clear that Metro is not exploring whether to do this, but how to do this. As a Committee Member, it is frustrating to be told that we will receive information later or we will see it on a slide. We have been asking to see materials in advance constantly and this pattern continues, which is a challenge for oversight. If all we want to do is change oversight, does that require a vote? There has been a huge shift from having housing development as an eligible activity to a mandated activity.
 - **Metro response, Liam Frost:** For the question about whether changing oversight requires a vote, I would have to ask an attorney. The urgency is the same sense of urgency when voters passed the measure in 2020 to serve populations in need.

Brian Kennedy, Metro, reviewed a series of bar charts illustrating scenarios that model potential future allocations (see [12/02/24 meeting packet pages 73-82](#)). He noted that the bar charts are not forecasts, but scenarios that model historical patterns of volatility. Scenario 0 is the current law. Scenarios 1 and 2 include assumptions for a tax sunset extension to 2050, tax indexing beginning in 2026, and inflation at 3%.

Committee members had the following questions and comments:

- **Question, Peter:** Why does there have to be a funding dip for counties in each scenario? Is it possible to see a scenario where counties do not lose money? If the Regional Investment Fund (RIF) goes away, what happens to the Tri-County Planning Body (TCPB) projects that are funded by the RIF? I sit on other oversight committees in Clackamas County, and sometimes I hear two different things. At the last Clackamas County Board of Commissioners meeting, staff projected a \$28 million loss of funding, which is different than what is shown here. It would be nice to have Metro and county staff join us together to discuss this and help us provide oversight.
 - **Metro response, Brian:** The funding dip is to manage volatility and create stability for counties. It is possible to see that scenario, but I am not sure if it would be productive. The difference in numbers is that counties are discussing their budget and current and forecasts for upcoming fiscal years, whereas what we are looking at are numbers that are exercises, not forecasts.
- **Question, Felicita:** Are these charts reflective of funds set aside for built infrastructure? Not only is there less money for the services counties need but there will be even less due to funds set aside for construction.
 - **Metro response, Brian:** I would say that the money is not gone and that these graphs are trying to show the base allocations for stability. The other buckets of money are in the mix.
- **Question, Dan:** I second Peter's request to have Metro and County staff join us and I would like it to be a three-hour work session. Let us all remember this is a vote of the public, and we are the supporters of this work. Why are we allocating funds to cities? They have not historically been social service providers, and this takes money away from existing programs. There are other options to fund work within cities such as grant funding. Who will run the housing program, the counties or Metro?
 - **Metro response, Brian:** Counties hear from city partners that there are intersections with people experiencing homelessness and they are interested in

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accessing some resources. The Affordable Housing Bond is a successful model for implementation partners, where Metro is the funder for partners.

- **Question, Carter:** All these governments are under-resourced, and you are proposing to remove resources from them. What is the goal for housing unit production? There are strategic preserves and contingencies to deal with volatility, it is baked into the system already. Metro had a successful housing bond measure. The impact on these programs from this approach is inexcusable.
 - **Metro response, Brian:** Goals for housing production have not been set, Metro is still looking at scenarios. There is no scenario where all needs are met. Metro is focusing on the volatile tax structure and looking at how to have long-term stability. The political polling has shown that another bond measure will not pass.
- **Comment, Jeremiah Rigsby:** Regarding the intent of this input, Metro Council will vote on this regardless of what we are saying. What is our role as a committee to give input to Metro Council? It does not seem that we have time to do issue spotting, get consensus, and share with Metro Council.
- **Comment, Co-chair Savara:** We can exert influence around where and how oversight happens, and where oversight is and is not functioning. We can also provide feedback unrelated to our role as a Committee, but based on our individual experiences in our jobs, which is also important. We can look at creating a joint letter, or other options, to elevate our perspectives on oversight to the Council.
- **Comment, Carter:** I agree that how oversight works is part of it, but a lot of it is how funds are spent and the commitment to the people we are trying to serve.
- **Comment, Peter:** There is a significant difference between advisory and oversight bodies, yet I do not see oversight happening at the Metro level or Clackamas County level. I am frustrated by the tremendous lack of oversight. I think a decision needs to be made, but I do not know why voters have to make that decision.
- **Comment, Dan:** Back to responsibility, it is the financial management and how it has been spent. I do not feel that we have the right numbers. We do not know what the impacts are because the numbers are different. We cannot tell if we can support the funding reduction or not. Maybe our recommendation could be to support a scenario, modify a scenario, or slow down the process.
- **Comment, Washington County Chair Harrington:** Metro staff is doing a good job representing the Council's direction. The Committee is doing good work, but the Council is dealing with the need for affordable housing, and they feel that they do not have enough control. They feel that there is an element missing for changing the course that the counties have taken. This has come up in the conversations from the stakeholder advisory table. Trying to recognize the delicate nature of how the original measure is put together and the issues the Council is grappling with today. This committee does have great oversight experience and has something to offer back to Metro Council.
- **Comment, Metro Councilor Christine Lewis:** After each meeting, I bring back notes and a summary to my colleagues and will share this discussion with them tomorrow. We are not looking for control but looking for lines of sight. We are two years into negotiating a data agreement, and we still cannot show the data that the taxpayers are asking us for. We cannot show the voters what we are doing. This is not about control, but access and lines of sight.

Yesenia, Metro, reiterated that feedback shared in this meeting will be shared with the Council and that Metro staff will follow up with the Co-chairs to work through some of the action items that arose from this discussion.

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Metro Tax Collections and Disbursement Update

Brian, Metro, shared that through October 2024, there has been \$62.4 million in tax collection and that this year's tax collections are trending below prior fiscal years. He clarified that the calendar year for tax collections is July 2024 through June 2025.

Discussion: FY24 Annual Report Reflection and Questions

Yesenia, Metro, stated that the counties have provided their annual reports, as shared and discussed at the November meeting, and now it is time for the Committee to discuss its priorities for the regional report.

Co-chair Savara reflected that Dr. Taylor and he discussed how Population A and B data was not received. He shared that the Co-chairs developed a letter regarding the ongoing challenges with a regional approach to Populations A and B and stated expectations on resolving that issue.

Peter reflected that the letter the Co-chairs sent was great and reflected the content and spirit of the Committee.

Josh asked for each Committee member to share any initial reflections on the counties' annual reports, including thoughts on overall progress and main successes and challenges.

- **Comment, Peter:** There was a tremendous amount of success in goals and outcomes. Not every goal was met and it is important to note why. The two challenges were Population A and B data, and not having a bigger picture of what the system needs. Additionally, Clackamas County does not have a Local Implementation Plan (LIP) and that is a challenge that should be called out.
- **Comment, Jeremiah:** I echo Peter's comments. I appreciate each county's work, and seeing the amount of people being served was helpful and encouraging. I saw what equity meant in the reports and the successes of culturally-specific organizations.
- **Comment, Jim Bane:** The work the counties have done is amazing, and the significant tax cut is scary. When I reviewed the LIPs, the counties seemed to be short on their PSH goals.
- **Comment, Felicita:** I support everyone's comments so far. Amazing profound work is being done and I appreciate Washington County's training programs.
- **Comment, Dan:** I echo everything that has been said and have questions about training and duplication of efforts. Where are there communication gaps and where have communications worked well? I want to ensure that work is not being duplicated at the Metro or county level. There is an opportunity to be on the same page and spend money wisely. One of the reasons the Committee is concerned about getting the housing reform change right is because we have seen this work be successful. We want to be critical and ensure the next steps are right.
- **Comment, Mitch Chilcott:** There is a lot of great work being done by many. I have enjoyed the elevated, passionate, and honest discussions and hope that continues with the structure of governance conversations.
- **Comment, Margarita Solis Ruiz:** I do not have much to add because of my leave of absence this past year. I appreciate sharing the space and the passion of the Committee. There are many successes and a lot to still do.
- **Comment, Co-chair Savara:** Seeing the results is impressive and incredible. There are challenges around basic contracting and payment, alignment with LIPs to keep priorities and values updated, and having the correct balance of investments between prevention and rehousing abilities.

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- **Comment, Washington County Chair Harrington:** There is a lot to be proud of in the region. For the Year Three annual report, I wonder how this group will go through its work session discussions regarding Population A and B and LIP requests.
- **Comment, Metro Councilor Lewis:** I will take this conversation back to my colleagues. I heard today about how to have these conversations, what is oversight, and the roles of bringing the unknowable and unquantifiable perspective and weaving in stories of success. Now about leveling up to the systems level.

Annual Report Outline

Kris Smock, Kristina Smock Consulting, reviewed the annual report process and her role in supporting the Committee by writing the technical pieces of the report. She stated that the Committee's work will be focused on the transmittal letter, which will include key successes and challenges from the past year. She asked for the Committee to hone in on key elements that it would like to highlight in the letter. She reviewed the draft report outline and asked Committee members to email her for any questions or feedback.

Next Steps

Josh thanked everyone for their contributions.

Next steps include:

- Metro to share Council meeting materials and public comments regarding housing funding.
- Metro to share housing funding public opinion research.
- The Committee to consider having additional work sessions to develop their approach to providing input to Metro on the housing funding conversations.
- The Committee to meet on December 9, 9:30 am-12:00 pm.

Adjourn

The meeting adjourned at 12:00 pm.



Supportive Housing Services Oversight Committee Meeting Summary

Meeting: Supportive Housing Services (SHS) Oversight Committee Meeting
Date: December 9, 2024
Time: 9:30 a.m. to 12:00 p.m.
Place: Virtual meeting (Zoom)
Purpose: Metro five-year forecast presentation, Tri-County Planning Body technical assistance updates, discuss recommendations for annual regional report.

Member attendees

Co-Chair Dr. Mandrill Taylor (he/him), Co-chair Mike Savara (he/him), Peter Rosenblatt (he/him), Kai Laing (he/him), Felicita Montebancho (she/her), Jeremiah Rigsby (he/him), Margarita Solis Ruiz (she/her), Dan Fowler (he/him), Dr. James (Jim) Bane (he/him), Jenny Lee (she/her), Mitch Chilcott (he/him)

Absent members

Carter MacNichol (he/him), Cara Hash (she/her)

Elected delegates

Washington County Chair Kathryn Harrington (she/her)

Absent elected delegates

Clackamas County Chair Tootie Smith (she/her), City of Portland Mayor Ted Wheeler (he/him), Multnomah County Chair Jessica Vega Pederson (she/her), Metro Councilor Christine Lewis (she/her)

Metro

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

Kearns & West Facilitator

Josh Mahar (he/him)

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

Welcome and Introductions

Co-chairs Dr. Mandrill Taylor and Mike Savara provided opening remarks and shared updates regarding the Population A and B letter they shared with Metro and the three counties. They shared that they received response letters from the jurisdictions and the next steps include meeting with the jurisdictional leadership team and identifying ways to move forward. They reflected that the Committee had a clear interest in having a focused discussion on housing funding and they will follow up with the Committee to schedule a work session.

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

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Peter Rosenblatt reminded the Committee that Carter MacNichol was not able to attend but had emailed comments regarding the five-year forecast.

Conflict of Interest Declaration

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

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

Margarita Solis Ruiz declared that she is a Regional Long-term Rent Assistance (RLRA) case manager in Washington County and receives SHS funding.

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

Jenny Lee declared that she works at the Coalition of Communities of Color, which has partnerships with organizations that receive SHS funding.

Public Comment

No public comment was received.

Five-Year Forecast

Josh Hardwood, Metro, stated that he received Carter's comments and that his comments reflected the chicken-and-egg scenario with revenue and expenditure forecasts. Josh Hardwood noted that this forecast was for revenues and reviewed the FY23-24 variability graph, the FY24/25- FY29/30 forecast graph, and the Oregon capital gains graph (see pages 60-65 in the [12/09/24 archived meeting packet](#)). He shared that 2024 ended 6% below forecast, that the local economy is doing worse than the national economy, and that the next two years are expected to be slow to no growth. He reflected that long-term growth in tax collections is dependent on the Metro region attracting investment.

Committee members had the following questions and comments:

- **Question, Peter:** There was information in the meeting packet about how some taxpayers have not paid yet and others, who have paid, are getting refunded. I use H&R Block to pay taxes, and their program does not know this tax exists. It is challenging for me to have siloed discussions without discussing corresponding items like expenditures and cash flows. I hope in the future we can place our discussions into the context that is needed. I would also like to know more about the potential impacts of the volatility of the tax on housing developments.
 - **Metro response, Josh Hardwood:** The tax is available in other programs like TurboTax, and we are working on expanding the programs that incorporate this tax.
 - **Response, Co-chair Savara:** From the last meeting I heard a request to hear from county leadership both regarding the housing funding reform and the five-year forecast. We are working on finding the right time and opportunity to bring in county staff.
- **Comment, Washington County Chair Kathryn Harrington:** I appreciate the clarity about the conditions you foresee and how enforcement of the tax has helped with revenue collections.

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- **Question, Co-chair Taylor:** Can you elaborate on what local investments can drive future incomes?
 - **Metro response, Josh Hardwood:** I am talking about professional investments in the region, like Intel and Nike where the average employee is a high-income earner. Large professional, long-term investments from outside the region can help us.
- **Question, Dan:** I would like to know more about when areas of deficiency occur and when the Committee gets that information to discuss. There are two nebulous areas of expenditure: collection cost and Metro staffing. Are there ways to lower those costs? It would be helpful to get the big picture and numbers related to Metro's full-time employee (FTE) growth, FTE in collections, and administration and personnel costs from each county.
 - **Metro response, Yesenia Delgado:** Each year we get better at trying to have a coherent and strategic way for the Committee to provide feedback and input, and there is still room for improvements. County expenditures and broader financial information will be available in the annual report and the Committee can discuss that as part of that process. As Co-chair Savara stated, we are trying to identify opportunities to hear from the counties sooner.
 - **Metro response, Josh Hardwood:** To clarify, tax collection costs are 100% for our city partners to cover the cost of tax administration and that component is baked in until 2031.
- **Comment, Kai:** Cost is not our group's responsibility. We can fixate on cutting costs, but it is important to focus on capacity as well. We had a lot of revenue, so capacity was ramped up, and it is important to not swing in the other direction. If we cut staff, then there will not be people to do the work. I encourage the group to maintain the mission as its long-term goal.

Tri-County Planning Body (TCPB) Technical Assistance Updates

Yesenia shared that the Committee would receive updates on the technical assistance and training goals from the TCPB and noted that the implementation plan would come later. She reminded the Committee that training and technical assistance were part of their recommendations from last year.

Cole Merkel and Nui Bezaire, Metro introduced themselves and noted that this presentation will only focus on technical assistance (TA) updates. The Committee will tentatively receive a training update in March. They expect to come back and ask for approval on the implementation plan in April. They noted that these goal areas are being funded through Metro's administration funding.

Cole and Nui reviewed the goals of Metro's Regional Capacity Team and noted that there are now 67 technical assistance consultants qualified to provide regional services. They presented Metro's permanent supportive housing (PSH) work to develop a regional framework that includes programmatic policies, regionally consistent definitions, and standards of practice. They reviewed the PSH project's guiding values and goals, including avoiding duplicating efforts and building a regional TA program. They reviewed the project structure, and the benefits providers would receive by being a part of the project.

Committee members had the following questions and comments:

- **Question, Felicita Monteblanco:** Funders love TA. Can you clarify that this PSH exploration is step one of the whole project? If I am a nonprofit, how do I access these resources?
 - **Metro response, Cole:** We want to identify what role Metro can play in supporting providers. We are focusing on services and provider needs related to PSH to inform future work. Counties have set up their own TA doorways.

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- **Question, Co-chair Taylor:** Are there metrics for what success looks like for this demonstration project?
 - **Metro response, Nui:** There are best practices that have been put forward. This project is about using those as a starting place and then learning and developing our regional lens.
- **Comment, Peter:** I appreciate that we will not be voting on the budget, but it would be helpful to see the budget to understand the big picture and what funds and staffing levels at Metro look like.
- **Question, Dan:** I appreciate the comments on measuring success, the feedback loop is critical. Can you explain why it is okay to currently use SHS funding for PSH?
 - **Metro response, Cole:** There are three components to PSH: the unit, rent voucher, and services. We cannot spend SHS funds on the unit, but we can spend on rent vouchers and services. This effort is specifically focused on services.
 - **Comment, Peter:** As a provider, the first time I heard PSH I thought it did not apply to us, but now I understand how expansive PSH is.
 - **Metro response, Patricia Rojas:** Part of our role as funders is to support regionalization of the work and to understand what goes into regionalization and that is also part of why SHS funding is going towards this effort.
- **Comment, Co-chair Savara:** As a state employee it has been great to get outreach from Metro on what has been done, what has worked, and what is challenging. Reflecting on Metro's role as a funder, there is a difference between being a funder and a pass-through agency. As a funder, Metro needs to have an infrastructure of staff to analyze outcomes, reports, and recommendations.

Recommendations Discussion

Yesenia reviewed the Committee's roles and responsibilities for the annual reports and the FY 23 recommendation categories: financial and data transparency and accountability, program expansions, regional communication and engagement, workforce and capacity issues, and outreach.

Yesenia shared updates on the recommendations within the financial and data transparency and accountability category. For the "optimize financial reporting" recommendation, she noted that two components were in progress and three were completed. She mentioned that Metro and two of the counties had reached an impasse regarding a data monitoring framework.

Hunter Belgard, Metro, reviewed the "enhance data integrity" recommendations and provided updates. He noted that three recommendations have been completed and that three are in progress. He noted that Committee members can check the Metro progress tracker website for specific updates. Hunter reviewed the "evaluate to inform improvement" recommendations and provided updates. He noted that one recommendation has been completed and that two are in progress.

Lizzie Cisneros, Metro, reviewed the "strengthen implementation of new programs" recommendations and provided updates. She noted that the two recommendations are in progress.

Israel Bayer, Metro, reviewed the "regional communication strategy" recommendations and provided updates. He highlighted that the RFQU for a consultant to develop a regional communication strategy to be fully implemented in Spring 2025 will be released in Winter 2025.

Ruth Adkins, Metro, reviewed the "institute livable wages" and "expand access to health and behavioral health services" recommendations, and provided updates. She highlighted that these recommendations align with the TCPB's goals and recommendations and shared updates on their progress.

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Yesenia reviewed the remaining workforce and capacity issue recommendations and outreach recommendations and shared updates. She noted the connection of these items to Metro's TA work and the counties' work to provide multi-year contracts.

Yesenia reviewed the Committee's parameters for the FY 24 recommendations, including focusing on the depth of recommendations and limiting the overall number of recommendations.

Committee members had the following questions and comments:

- **Comment, Peter:** I am not sure what organizations Clackamas County is giving multi-year contracts. I would like to hear more at our next meeting about the two counties rejecting the monitoring framework. This reminds me of the Population A and B responses. It seems that counties can opt in and out of what they choose. For healthcare integration, I always hear about HealthShare, but never Trillium. Living wages are a long-term issue and SHS funding is a beneficial way to be able to pay front-line staff an equitable wage.
 - **Metro response, Ruth:** Great point about Trillium, we have done some outreach, but we did start with HealthShare since they are the largest provider in the region.
- **Comment, Co-chair Savara:** One theme this year is how decision-making happens in this space. The intergovernmental agreements (IGAs) lay out how decision-making should happen, but it is not being actualized in the way that it needs to, and that is impacting our ability to have oversight and accountability. For our recommendations this year, we should think about how to set the framework to allow these things to effectively happen.
- **Comment, Felicita:** I agree with Peter's comments on wages. Multnomah County did not give a timeframe for payments, and I would like to know what that is. Regarding Co-chair Savara's comments, I imagine that the upcoming ballot measure is making things complicated and that the IGAs will be wiped clean on July 1.
 - **Metro response, Yesenia:** We can follow up with Multnomah County to get that information.
- **Comment, Washington County Chair Harrington:** I was unaware of the fact that there was a disagreement regarding the monitoring framework. I like to think of myself as a problem solver and if the decision makers are unaware, the process is not working.

Next Steps

Yesenia asked the Committee to share any remaining questions or comments regarding the recommendation update over email.

Next steps include:

- Co-chairs and jurisdictional leadership to discuss next steps regarding Population A and B.
- The Committee to discuss housing funding updates at a work session.
 - Metro and Co-chairs to support scheduling.
 - The Committee to discuss the potential impacts of the volatility of the tax on housing developments.
- Metro to follow up with Multnomah County to get specific timeline payment information.
- The Committee to meet on January 13, 9:30am-12:00pm.

Adjourn

The meeting adjourned at 12:00 pm.