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**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

# Agenda

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

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9:30 a.m.	Welcome and introductions
9:45 a.m.	Conflict of Interest declaration
9:50 a.m.	Public comment
10:00 a.m.	5 year forecast
10:30 a.m.	TCPB-Technical Assistance Updates
11:05a.m.	Break
11:15 a.m	Recommendations Discussion
11:55 a.m.	Next steps
12:00 p.m.	Adjourn

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

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## Supportive housing services – Oversight committee

Overview of role and responsibilities

Last updated: September 2024

### Background

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

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

### Oversight committee role and responsibilities

Requirement	Source text
<b>Local implementation plans and Regional Plan</b>	
Evaluate and recommend Local Implementation Plans	<b>SHS Work Plan, section 3.4:</b> The committee will be charged with the following duties...A. Evaluate Local Implementation Plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval.
Approve Regional Plan developed by the Tri-County Planning Body	<b>Tri-county planning body charter:</b> Develop a Regional Plan for <i>approval by the Regional Oversight Committee</i> that incorporates regional strategies, metrics, and goals as identified in Metro SHS Workplan and the counties’ Local Implementation Plans.
Review LIP amendments and recommend approval or denial to Metro Council for: <ul style="list-style-type: none"> <li>• Alignment with Tri-County Plan</li> </ul>	<b>Intergovernmental Agreement, section 5.2.4:</b> Within one year of the adoption of the Tri-County Plan, and as needed thereafter, Partner will bring forward any necessary amendments to its Local Implementation Plan that incorporate relevant regional goals, strategies, and outcomes measures. The ROC will review the amendments and recommend approval or denial of the Plan amendments to the Metro Council.
Request County Partner amend its LIP: <ul style="list-style-type: none"> <li>• Based on one or more SHSOC recommendations;</li> <li>• Based on a significant change in circumstances impacting homelessness in the region;</li> </ul>	<p><b>Intergovernmental Agreement, section 5.2.3:</b> Within 60 days of the date that Partner presents its Annual Program Report to Metro Council, Metro or the ROC may, in consultation with the other, request that Partner amend its Local Implementation Plan based on one or more ROC recommendations or a significant change in circumstances impacting homelessness in the Region.</p> <p><b>SHS work plan, section 5.3:</b> The Regional Oversight Committee will review each Annual Progress Report and may recommend changes to the Local Implementation Plan to achieve regional goals and/or to better align the Local Implementation Plan with the Work Plan.</p>

Requirement	Source text
<ul style="list-style-type: none"> <li>To achieve regional goals; and/or</li> <li>To better align LIP with SHS Work Plan.</li> </ul>	
<b>Annual reporting and work plans</b>	
Review county annual work plans	<b>Intergovernmental Agreement, section 5.3:</b> Beginning in FY 2022-23, Partner must annually submit an Annual Work Plan to Metro and the ROC for their review on or before April 1 for the subsequent Fiscal Year.
Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals	<b>SHS work plan, section 3.4:</b> The committee will be charged with the following duties:...B. Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals.
Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes	<b>SHS work plan, section 3.4:</b> The committee will be charged with the following duties:...D. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.
<b>Fiscal oversight</b>	
Monitor financial aspects of program administration, including review of program expenditures.	<b>SHS work plan, section 3.4:</b> The committee will be charged with the following duties:...C. Monitor financial aspects of program administration, including review of program expenditures.
Annual review and consideration of whether the recommended administrative costs should be reduced or increased. (for Metro, County Partners and service providers)	<b>SHS work plan, section 5.3:</b> As part of the annual review process, the Regional Oversight Committee will evaluate tax collection and administrative costs incurred by Metro, Local Implementation Partners and service providers and consider if any costs should be reduced or increased. The committee will present any such recommendations to the Metro Council.
Review Metro Budget	<b>IGA 5.4.1:</b> At least annually, Metro will prepare a written budget for its SHS program that details its use of Income Taxes and its Administrative Expenses and will present its SHS budget to the ROC [Regional Oversight Committee]. The ROC will consider whether Metro’s SHS budget, its collection costs, and its Administrative Expenses could or should be reduced or increased. The ROC may recommend to the Metro Council how Metro can best limit its collection and Administrative Expenses in the following Fiscal Year.
Review five-year forecast	<b>IGA 7.2.1.1:</b> Metro’s CFO, in consultation with the FRT, must prepare a five-year revenue forecast to support the Counties in developing their annual budgets and revising current year estimates as needed. The forecast will evaluate Income Taxes collection activity, SHS program expenditure activity, cash flows, adequacy of funds in Stabilization Reserves, economic factors impacting tax collections, and the overall financial health of the SHS program. Metro will provide these forecasts to the ROC and TCPB by the first business day in December, and provide timely updates of those projections, as available.



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

## **Supportive housing services regional oversight committee**

### **Meeting guidelines**

Arrive on time and prepared.

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

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

Listen carefully and keep an open mind.

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

Avoid side conversations.

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

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

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

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

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

## **Group agreements**

We aren't looking for perfection.

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

You are the author of your own story.

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

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

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

We are all learners and teachers.

Expertise isn't privileged over lived experience and wisdom.

Liberation and healing are possible.

Expect non-closure.

# Metro's Regional Capacity Work

## Metro's Regional Capacity Team

- Cole Merkel: Regional Capacity Manager
  - [Cole.Merkel@oregonmetro.gov](mailto:Cole.Merkel@oregonmetro.gov)
- Justin Barrieault: Training Program Manager
  - [Justin.Barrieault@oregonmetro.gov](mailto:Justin.Barrieault@oregonmetro.gov)
- Daisy Nguyen: Technical Assistance Program Manager
  - [Daisy.Nguyen@oregonmetro.gov](mailto:Daisy.Nguyen@oregonmetro.gov)

*Supportive Housing Services Oversight Committee*

*December 9, 2024*





# Outline

- I. Background on Metro Housing Department's Regional Capacity Team
- II. Permanent Supportive Housing Technical Assistance Demonstration Project
- III. Overview and feedback: Housing Service Worker Certification and Research Project

# 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:

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

# RFQu 4269: new TA consultants

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

**Total qualified agencies: 67**

**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

# What is technical assistance?

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

Increasing  
staff capacity

Increasing  
funding  
capacity

Developing  
policy and  
procedures

Implementing  
technology

Customized  
trainings

...and more!

# Project guiding values and goals

## Advance Racial Equity

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

## Add value to the system

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

Measure the impact of technical assistance investments

## Avoid duplicating TA counties are already providing

Build a regional technical assistance program

## Support PSH implementation system-wide

Help align local service delivery with national best practices

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

# Project structure

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





# Provider benefits

A customized  
assessment

Tailored technical  
assistance  
services

Customized  
trainings

Build your  
network

Help shape the  
future of PSH in  
our region

Funding for staff  
time (contract  
model)

# Provider commitment

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

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

## **Reports**

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

# Metro's role: project leadership

Contract  
management

Host monthly cohort

Partner in  
provider/consultant  
relationship

Coordinate research

Act on learnings

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

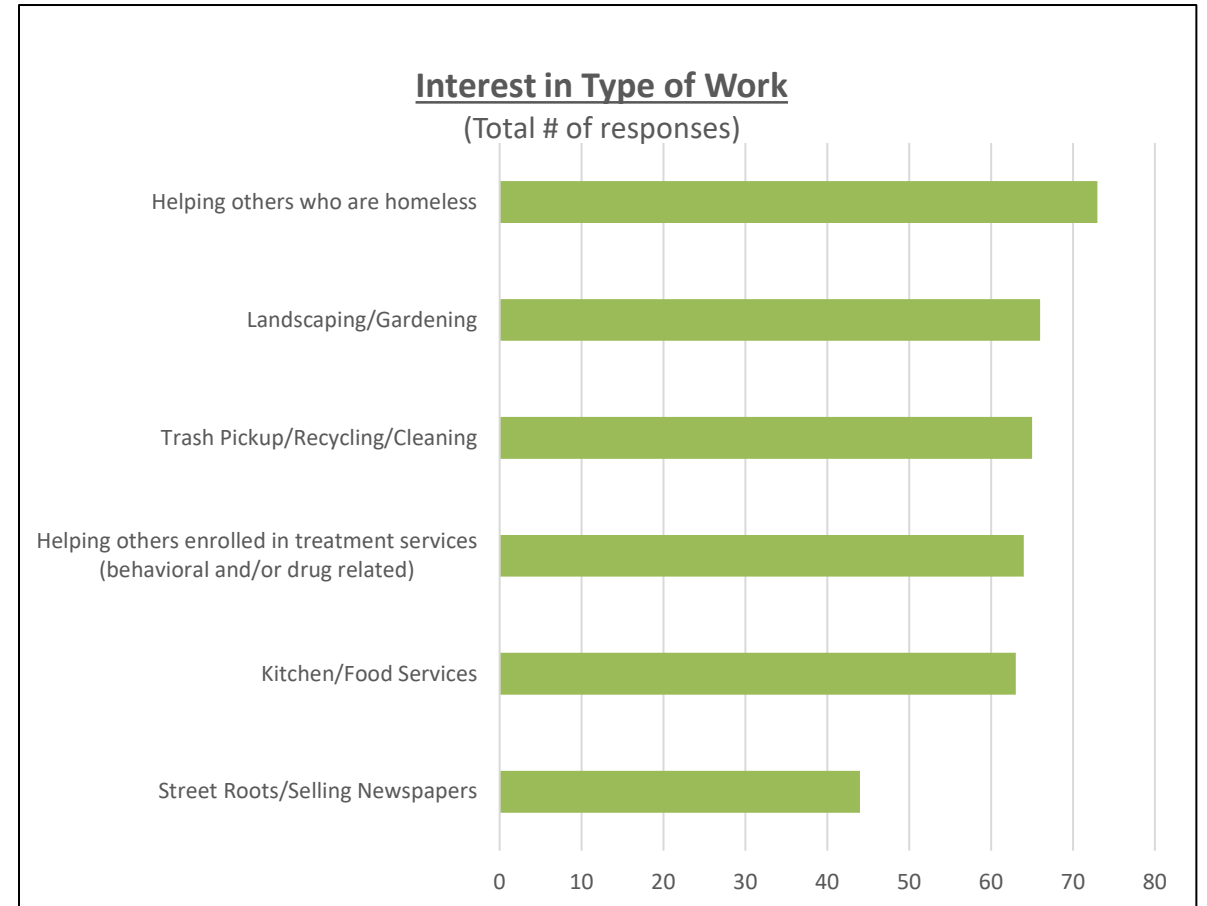
# Guiding values for project

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

# The need and opportunity

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

- Local Service Provider



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

# Defining “housing service worker”

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

# Research question

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

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



# Potential courses

Substance use  
recovery and  
mental health

Basics of  
housing case  
management

Basics of  
housing system  
navigation

Diversity  
equity and  
inclusion

Trauma-  
informed care  
and self-care

# Potential courses

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

# Local research findings

## College programs

Certificates

Degrees

Non-credit options

Associate

Bachelor's

Non-credit  
Training  
Certificate  
(NCTC)

PSU's Center  
for Executive  
and  
Professional  
Development  
(CEPE)

Continuing  
education  
units (CEUs)

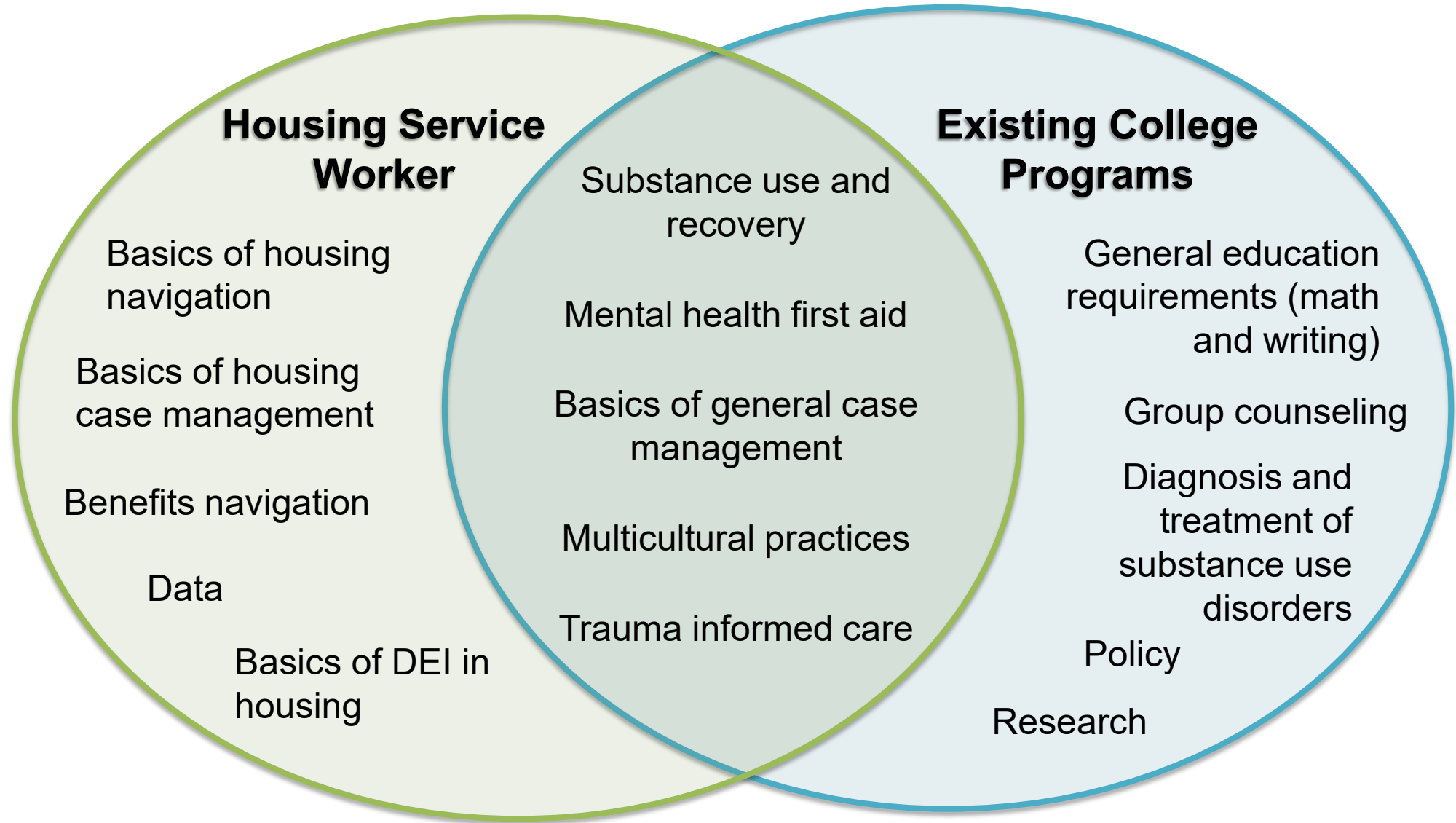
## Other pathways

Scaling up  
existing  
trainings

Workforce  
boards

Peer  
training

# Existing course overview



# National models

## College programs

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

## Advocacy training courses

<ul style="list-style-type: none"><li>• <b>Speak Up!</b> Corporation for Supportive Housing</li><li>• <b>Lived Experience Training Academy (LETA)</b> National Coalition for the Homeless</li><li>• <b>Residents Organizing for Change (ROC)</b> Neighborhood Partnerships Oregon</li><li>• <b>Street Roots Ambassador Program</b> Street Roots Portland</li></ul>
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## Virtual training courses

<ul style="list-style-type: none"><li>• <b>The Alliance Center for Capacity Building (the Center)</b> National Alliance to End Homelessness</li><li>• <b>Homeless and Housing Resource Center (HHRC)</b> Substance Abuse and Mental Health Services Administration (SAMHSA)</li><li>• <b>Supportive Housing Training Center</b> Corporation for Supportive Housing (CSH)</li><li>• <b>C4 Innovations</b></li></ul>
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# Areas for further research

Workforce  
boards

Apprenticeship  
programs

Housing specific  
peer-support  
training

**An Immediate Opportunity**

# On-Demand Training Program Pilot

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

## **How to participate**

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



# Discussion



## Supportive housing services – Oversight committee recommendations

Last updated: December 2024

This document contains updates on the recommendations that the SHS oversight committee developed for the [FY23 annual regional report](#).

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

### Category 1: Regional communication and engagement

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

The regional strategy should include:

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

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

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

## Category 2: Financial and data transparency and accountability

**Optimize financial reporting:** Strengthen strategic oversight and accountability by improving the quality, clarity and consistency of regional financial reporting. Priority areas for Metro’s work include:

- Work with counties to lead the development of tools, definitions and methodologies for measuring and reporting on spending by Populations A and B and release guidance to ensure accurate and reliable data are provided in counties’ year three annual reports
- Support the development of tools and methodologies for tracking future financial obligations such as long-term rental assistance payments
- Align financial reporting categories with programmatic reporting to support analysis and oversight
- Provide clearer information to the oversight committee on allocations of SHS funding to reserves and contingencies
- Expand reporting to the oversight committee on tax collections to include collection challenges

Task	Lead(s)	Timeline and deliverables	Progress to date
Development of tools, definitions and methodologies for measuring and reporting on spending by Populations A and B	Metro staff (oversight and accountability)	<b>April / May 2024</b> – Tools and definitions / methodologies developed  <b>October 2024</b> – FY24 reports due	Metro provided the counties with definitions and methodologies for measuring and reporting on spending by Populations A and B in June 2024.  Updated financial reporting was required by counties for FY24 annual reports. Other improvements, including changes to standardized data collection in HMIS, are underway and will be included in FY25 annual reports.
Release guidance for Populations A and B in FY24 annual reports	Metro staff (oversight and accountability)	<b>May 2024</b> – Fully incorporated into annual reporting templates	The annual report template was updated and shared with the counties at the end of June for use in FY24 annual reports.
Support the development of tools and methodologies for tracking future financial obligations such as long-term rental assistance payments	Metro staff (finance)	<b>Fall 2024</b> – Financial planning tool developed  <b>Spring 2025</b> – Presentation from CSH	Metro has contracted with the Corporation for Supportive Housing (CSH) to support our emerging PSH work, including forecasting costs of PSH more broadly. CSH and staff are currently working to finalize a financial planning tool that will help us scope PSH funding across the region. This information will be presented to the oversight committee in spring FY25.
Align financial reporting categories with programmatic reporting to support analysis and oversight	Metro staff (oversight and accountability)	<b>Summer 2024</b> – Financial workbook is updated	The financial workbook has been updated for FY25.

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

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

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

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

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

Work with the counties to develop systems and technologies for regional data collection	Metro staff (oversight and accountability)	<b>Ongoing</b>	<p>This work has started with providing regional HMIS data collection guidance for counting Population A and B with distinct HMIS data elements. Other work includes continued conversations around reporting specifications for counting ‘households’ regionally and moving away from the ‘Alone or in Combination’ method for Race/Ethnicity counting.</p> <p>The SHS oversight and accountability team has been collaborating with and attending all of the Housing and Health Care integration sessions, with the goal of moving towards a more regional “Coordinated Entry” system. The regionalization of this work includes HMIS Data Elements, HMIS visibility settings, and collecting client characteristics on Population A and B.</p>
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**Evaluate to inform improvement:** Evaluate regional progress and refine strategies and goals as needed to maximize SHS outcomes. Priorities for Metro’s work include:

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

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

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



**Category 3: Workforce and capacity issues**

**Address providers’ workforce and capacity needs:** Develop a regional work plan reflective of community-identified needs with timelines that incorporate short-term and long-term strategies for addressing workforce and capacity issues. The work plan should consider the following:

- Multi-year capacity building investments
- Regional training and capacity building support for providers
- A particular focus on meeting the needs of small, emerging and culturally specific providers
- An assessment of the current guidelines for allocation and use of administrative funds to ensure that providers’ expenses necessary to administer SHS programs are covered
- Regional strategies to support livable wages for direct service staff
- Additional supports for existing staff (e.g. mental health and wellbeing) to increase staff retention
- A framework for regular monitoring and evaluation

Task	Lead(s)	Timeline and deliverables	Progress to date
Develop a regional work plan	Metro staff (regional capacity)	<p><b>July 2024</b> – Regional capacity team fully staffed (6 FTE)</p> <p><b>November 2024</b> – Draft recommendations to TPCB</p> <p><b>December 2024</b> – Informational presentation to SHSOC</p> <p><b>March 2025</b> – Implementation plan presented to SHSOC</p>	<p>The Metro Regional Capacity Team continues to work to scale up and improve systems capacity for the region’s homeless services providers. In July, the qualified vendor list for the tri-county, Metro RFQu was posted and 67 businesses, service providers and consultants qualified to provide services. This list will serve as the basis for regional technical assistance work in the coming years.</p> <p>The team is also developing a baseline of trainings, skill sets and learning outcomes to support incoming frontline housing and homeless service workers. Research is underway that includes meeting with all the region’s local colleges, community colleges, universities and workforce boards to identify potential pathways for an existing or new program, as well as identifying the trainings and skillsets that providers and jurisdictions believe are necessary for incoming workers to have access to.</p> <p>Additionally, the team is launching a technical assistance demonstration project focused on adding capacity to the region’s Permanent Supportive Housing providers and measuring effectiveness of technical assistance interventions with a focus on the needs of residents of</p>

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

**Provide multi-year capacity building funding:** Develop and implement a regional strategy for providing multi-year capacity building investments for service providers:

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

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

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

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

Task	Lead(s)	Timeline and deliverables	Progress to date
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Develop strategies in collaboration with jurisdictions and local and state stakeholders that prioritize the needs of small, emerging and culturally specific providers	Tri-county planning body	<p><b>June/July 2024</b> – Progress Update: Homebase National scan and preliminary concepts presented to TCPB along with County updates</p> <p><b>February/March 2025</b> – Update provided to SHSOC</p> <p><b>Spring/Summer 2025</b> – Implementation plan presented to SHSOC</p>	Metro is working with Homebase, Counties, and partners to develop strategies in support of this TCPB goal: “County contracts for SHS funded agencies and providers will establish standards throughout the region to achieve livable wages for direct service staff.” In September 2024, a tri-county workgroup was launched to draft a regional plan. Metro and the Counties will provide an informational update on this goal area to the oversight committee in February or March 2024. The Employee Recruitment and Retention regional implementation plan is currently scheduled to be written and come to the TCPB for approval in May 2025, followed by review and approval by the oversight committee. Outreach and engagement with providers and local and state workforce entities is ongoing. The workgroup is monitoring other state contracting-related initiatives that would support this goal area.
Work collaboratively with counties to problem-solve strategies to address any administrative hurdles	Tri-county planning body		Pending the development of strategies.
<p><b>Streamline county administrative practices:</b> Work collaboratively with the counties to support the development of systems for managing procurements, contracts and spending that match the urgency of the crisis. This includes:</p> <ul style="list-style-type: none"> <li>• Creating more nimble and responsive administrative practices that are able to leverage the SHS fund’s unprecedented flexibility</li> <li>• Streamlining contract administration practices to better support provider capacity and expedite program implementation</li> <li>• Promoting payment practices that provide up front funding to support program start-up costs and expedited payments during implementation, particularly for small, emerging and culturally specific providers</li> </ul>			
Task	Lead(s)	Timeline and deliverables	Progress to date
Identify needs within current systems	County partners		The counties recognized the needs and improved their contract administration processes. Washington County made improvements in FY24 to streamline the invoice process and reduced the average invoice processing time down to 18 days. Clackamas County reported that in FY 2023-24, Housing and Community Development paid 82%

			<p>of invoices within a 30-day period. For Multnomah County, a recent recognized the Joint Office for leading the County in timely invoice payments; in May 2024, about 94% of invoices were paid within their contract's payment terms. Metro and the counties will continue to evaluate their progress and challenges in this area, and develop additional strategies as needed.</p>
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**Category 4: Program expansions**

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

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

Task	Lead(s)	Timeline and deliverables	Progress to date
Identify regional strategies	Tri-county planning body	<p><b>July 2024</b> – Landscape review complete</p> <p><b>January 2025</b> – Update provided to SHSOC</p> <p><b>February 2025</b> – Implementation plan presented to SHSOC (tentative)</p>	<p>The regional planning workgroup with Health Share, Counties, and Metro, with support from Homebase, has begun drafting a regional implementation plan using a shortlist of potential strategies. The TCPB goal is “Greater alignment and long-term partnerships with healthcare systems that meaningfully benefit people experiencing homelessness and the systems that serve them.” The implementation plan will focus on a few key regional opportunities to support, supplement, and advance existing health and housing system alignment initiatives. The draft implementation plan will be refined over the coming months with regional leadership, providers, and other partners. The plan is currently scheduled to come to the TCPB for approval in January 2025, followed by an update to the oversight committee in January and a vote in February.</p>
Implement regional strategies	Tri-county planning body		<p>Pending the development of strategies.</p>

**Strengthen implementation of new programs:** Monitor implementation of new and expanded program areas to support accountability and effectiveness:

- Monitor program areas that did not meet regional or county-level year-two goals, particularly rapid rehousing, to assess whether they will meet their goals in year three and provide oversight and problem-solving support as needed

<ul style="list-style-type: none"> <li>Monitor cross-sector alignment and programming to assess the need for regional strategies to support integration of wraparound supports such as employment, workforce and education</li> </ul>			
Monitor and assess program areas that did not meet regional or county-level year-two goals	Metro staff (oversight and accountability)	<b>Fall 2024</b> – Monitoring policies finalized <b>Winter 2025</b> – Monitoring to begin	<p>Metro increased its quality improvement and data capacity significantly in FY24. In addition to more thorough analysis of quarterly and annual reports as they relate to county-level and regional goals, Metro will start more in-depth monitoring of the counties in winter 2025.</p>
Monitor and assess cross-sector alignment and programming	Metro staff (oversight and accountability)		<p>In addition to the opportunities for increased assessment of programming through monitoring, Metro staff has already increased our assessment of quarterly progress, challenges, and concerns. Each county receives a performance review letter from Metro each quarter with clarifying questions, requests for additional data, and overall assessment from Metro.</p> <p>Needs for additional quarterly monitoring will be assessed once the updated quarterly reporting template is in place and updated reports are received from the counties in February 2025.</p>

**Category 5: Outreach**

**Promote comprehensive outreach:** Increase the visible impact of SHS investments through outreach strategies that are scaled to match the need:

- Provide information to support the oversight committee’s monitoring of counties’ outreach work, including the scale and scope of outreach efforts, who is being reached and the outcomes
- Work collaboratively with counties to identify opportunities to expand outreach strategies as needed to support a robust regional infrastructure for reaching the unsheltered population and connecting them with services

Task	Lead(s)	Timeline and deliverables	Progress to date
Provide information to support the oversight committee’s monitoring of counties’ outreach work	County partners	<p><b>February 2024</b> – Updated annual work plan template released</p> <p><b>September 2024</b> – FY25 work plans finalized</p> <p><b>October 2024</b> – Updated quarterly reporting template released</p> <p><b>February 2025</b> – Improved outreach data included in quarterly reports</p>	<p>Starting with FY25, the counties all provided outreach goals in their annual work plans. The quarterly reporting template has been updated to include outreach progress, including number of people / households served, demographic data, and funds spent.</p> <p>The oversight committee will begin to see this data in the FY25 Q2 report in February.</p>
Work collaboratively with counties to identify opportunities to expand outreach strategies as needed	County partners		Pending more data and analysis of outreach strategies starting FY25 Q2.