

Table of contents

Agenda

Metro respects civil rights

SHS oversight committee roles and responsibilities

Group agreements

Five year forecast report

TCPB-Technical assistance presentation

SHSOC-FY23 recommendations update tracker

Housing communications monthly snapshot

Clackamas County Pop A/B response letter

Multnomah County Pop A/B response letter

Washington County Pop A/B response letter



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.

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

Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit www.oregonmetro.gov/civilrights or call 503-797-1536. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at www.trimet.org.

Thông báo về sự Metro không kỳ thị của

Metro tôn trọng dân quyền. Muốn biết thêm thông tin về chương trình dân quyền của Metro, hoặc muốn lấy đơn khiếu nại về sự kỳ thị, xin xem trong www.oregonmetro.gov/civilrights. Nếu quý vị cần thông dịch viên ra dấu bằng tay, trợ giúp về tiếp xúc hay ngôn ngữ, xin gọi số 503-797-1700 (từ 8 giờ sáng đến 5 giờ chiều vào những ngày thường) trước buổi họp 5 ngày làm việc.

Повідомлення Metro про заборону дискримінації

Metro з повагою ставиться до громадянських прав. Для отримання інформації про програму Metro із захисту громадянських прав або форми скарги про дискримінацію відвідайте сайт www.oregonmetro.gov/civilrights. або Якщо вам потрібен перекладач на зборах, для задоволення вашого запиту зателефонуйте за номером 503-797-1700 з 8.00 до 17.00 у робочі дні за п'ять робочих днів до зборів.

Metro 的不歧视公告

尊重民權。欲瞭解Metro民權計畫的詳情，或獲取歧視投訴表，請瀏覽網站 www.oregonmetro.gov/civilrights。如果您需要口譯方可參加公共會議，請在會議召開前5個營業日撥打503-797-1700（工作日上午8點至下午5點），以便我們滿足您的要求。

Ogeysiiska takooris la'aanta ee Metro

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

Metro의 차별 금지 관련 통지서

Metro의 시민권 프로그램에 대한 정보 또는 차별 항의서 양식을 얻으려면, 또는 차별에 대한 불만을 신고 할 수 www.oregonmetro.gov/civilrights. 당신의 언어 지원이 필요한 경우, 회의에 앞서 5 영업일 (오후 5시 주중에 오전 8시) 503-797-1700를 호출합니다.

Metro의差別禁止通知

Metroでは公民権を尊重しています。Metroの公民権プログラムに関する情報について、または差別苦情フォームを入手するには、www.oregonmetro.gov/civilrights。までお電話ください。公開会議で言語通訳を必要とされる方は、Metroがご要請に対応できるよう、公開会議の5営業日前までに503-797-1700（平日午前8時～午後5時）までお電話ください。

សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

إشعار بعدم التمييز من Metro

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

Paunawa ng Metro sa kawalan ng diskriminasyon

Iginagalang ng Metro ang mga karapatang sibil. Para sa impormasyon tungkol sa programa ng Metro sa mga karapatang sibil, o upang makakuha ng porma ng reklamo sa diskriminasyon, bisitahin ang www.oregonmetro.gov/civilrights. Kung kailangan ninyo ng interpreter ng wika sa isang pampublikong pulong, tumawag sa 503-797-1700 (8 a.m. hanggang 5 p.m. Lunes hanggang Biyernes) lima araw ng trabaho bago ang pulong upang mapagbigyan ang inyong kahilingan.

Notificación de no discriminación de Metro

Metro respeta los derechos civiles. Para obtener información sobre el programa de derechos civiles de Metro o para obtener un formulario de reclamo por discriminación, ingrese a www.oregonmetro.gov/civilrights. Si necesita asistencia con el idioma, llame al 503-797-1700 (de 8:00 a. m. a 5:00 p. m. los días de semana) 5 días laborales antes de la asamblea.

Уведомление о недопущении дискриминации от Metro

Metro уважает гражданские права. Узнать о программе Metro по соблюдению гражданских прав и получить форму жалобы о дискриминации можно на веб-сайте www.oregonmetro.gov/civilrights. Если вам нужен переводчик на общественном собрании, оставьте свой запрос, позвонив по номеру 503-797-1700 в рабочие дни с 8:00 до 17:00 и за пять рабочих дней до даты собрания.

Avizul Metro privind nediscriminarea

Metro respectă drepturile civile. Pentru informații cu privire la programul Metro pentru drepturi civile sau pentru a obține un formular de reclamație împotriva discriminării, vizitați www.oregonmetro.gov/civilrights. Dacă aveți nevoie de un interpret de limbă la o ședință publică, sunați la 503-797-1700 (între orele 8 și 5, în timpul zilelor lucrătoare) cu cinci zile lucrătoare înainte de ședință, pentru a putea să vă răspunde în mod favorabil la cerere.

Metro txog kev ntxub ntxaug daim ntawv ceeb toom

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

Supportive housing services – Oversight committee

Overview of role and responsibilities

Last updated: September 2024

Background

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

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

Oversight committee role and responsibilities

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

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



600 NE Grand Ave.
Portland, OR 97232-2736
oregonmetro.gov

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

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.



Fall 2024 Supportive Housing Services Revenue Forecast

December 2024
Metro Finance and Regulatory Services
Revenue and Analytics Division (RAD)



Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit oregonmetro.gov/civilrights or call 503-797-1890.

Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at trimet.org.

EXECUTIVE SUMMARY

FY 2023-24 saw weaker Supportive Housing Services (SHS) tax collections than expected, and this forecast revises the near-term outlook to flat to slow tax revenue growth.

In 2023, Metro [provided a forecast](#) with more aggressive revenue estimates based on local tax collections in 2021 and 2022, the growth of the higher-income tax base indicated by state return data, and high revenue numbers early in the FY 2023-24 fiscal year. The year-end actual revenue of \$335.1 million was about 6% lower than the Fall 2023 forecast, which is within the margin of error that should be expected for these taxes.

However, the trend of weaker collections has continued through the first quarter of FY 2024-25. Income data from Tax Year 2022, released in mid-November 2024, suggests that the spike in tri-county income in Tax Year 2021 was more of an anomaly than a baseline. The next two years, at least, will likely result in slow to no growth in revenue. Due to the unstable nature of these taxes, however, collection estimates for the current year may vary by \$50 million.

Please note that the forecast presented here is based on the best available data and current tax law, both of which may change, impacting key assumptions of this analysis. Any law changes, legislative or through referral, may yield significant impacts to revenue and warrant additional analysis.

ROLE OF THE SUPPORTIVE HOUSING SERVICES REVENUE FORECAST

Metro's Supportive Housing Services Revenue Forecast plays a role in managing a complex system of taxes and services. Recognizing the volatility in the tax system and income variability of households with high incomes in particular, as well as the critical services that revenue supports, the forecast helps to manage expectations for future funding. By examining historical data, economic trends, and factors that influence taxable income and taxpayer behaviors, these forecasts project revenue streams, and provide information for partners to manage programs financed by the SHS taxes.

PROGRAM FORECAST

Figure 1 illustrates the best estimate of collections through FY 2029-30 based on current law, economic conditions, and available data.¹ Per intergovernmental agreements, after collection costs and Metro administration, the revenue is distributed in the following proportions: Multnomah County – 45.3%, Washington County – 33.3%, and Clackamas County 21.3%.

FIGURE 1. SHS Five-year Revenue Forecast/Distributions[†]

	FY 25	FY 26	FY 27	FY 28	FY 29	FY 30
Forecasted Tax Revenue	\$323.1	\$328.8	\$349.7	\$383.2	\$408.7	\$427.0
<i>Tax Collection Costs</i>	\$11.1	\$11.4	\$11.8	\$12.1	\$12.5	\$12.8
<i>Net Collections</i>	\$312.0	\$317.4	\$337.9	\$371.1	\$396.2	\$414.2
Metro Admin	\$15.6	\$15.9	\$16.9	\$18.6	\$19.8	\$20.7
Partners	\$296.4	\$301.5	\$321.0	\$352.5	\$376.4	\$393.5
Clackamas	\$63.1	\$64.2	\$68.4	\$75.1	\$80.2	\$83.8
Multnomah	\$134.3	\$136.6	\$145.4	\$159.7	\$170.5	\$178.3
Washington	\$98.7	\$100.4	\$106.9	\$117.4	\$125.3	\$131.0

[†]Columns may not sum due to rounding

Personal Income Tax

Understanding and managing the personal income tax base can be difficult, even when a system has been long established. The progressive structure of personal income taxes adds to their variability, as a significant share of revenue depends on a small group of high-income earners, as shown in Figure 2. This is particularly relevant for the SHS personal income tax, which relies heavily on the highest-income residents within the Metro area.

¹ Data sources include, but are not limited to, the Oregon Department of Revenue, City of Portland Revenue Division, S&P global, U.S. Bureau of Labor Statistics

FIGURE 2. Share of Personal Income Tax Revenue by Income Group and Tax Year



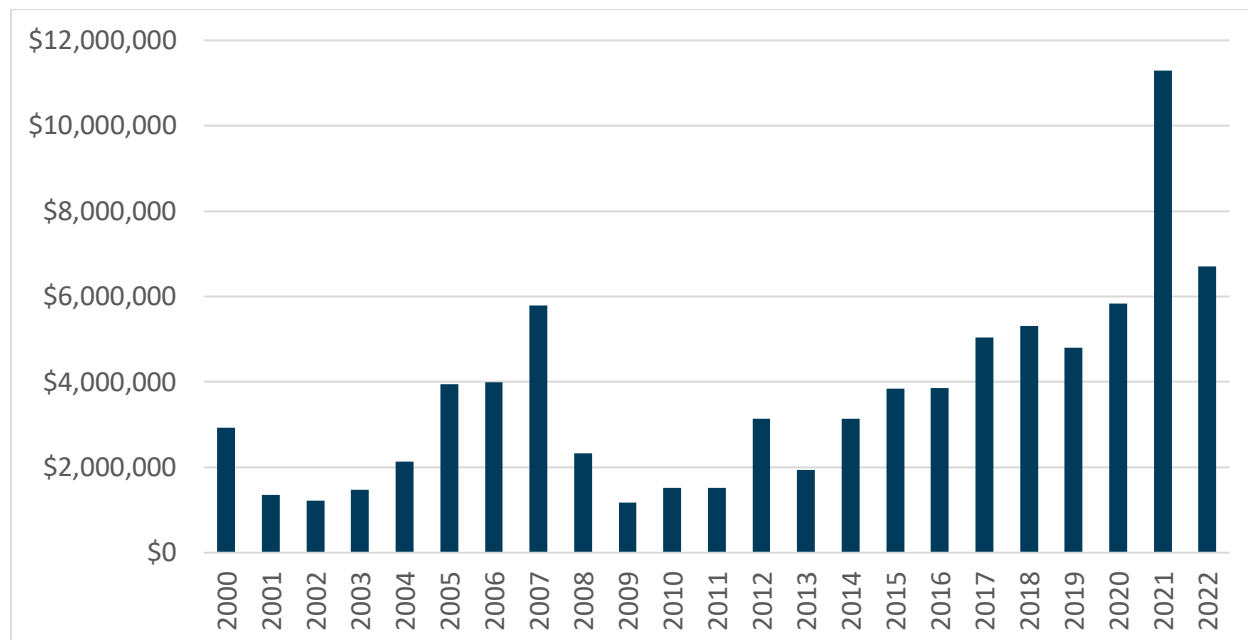
High-income taxpayers often derive a substantial portion of their income from non-wage sources, such as capital gains on investments, which are highly susceptible to market fluctuations and individual taxpayer circumstances and decisions. This sensitivity contributes to the volatility of their tax liability. For instance, at the tri-county level, taxpayers earning over \$500,000 saw a 67% increase in capital gains income between the 2020 and 2021 tax years. Some of these taxpayers may have experienced one-time income spikes from events such as selling a home or business, placing them temporarily above tax thresholds but below in subsequent years. Moreover, these taxpayers often can control the timing of some income realization, adding yet another layer of unpredictability to the tax base.

Capital gains taxation is subject to large swings from one year to the next,² with its impact becoming particularly evident during periods of rapid market expansion, as shown in Figure 3. Notably, historic peaks in capital gains income for both Oregon and the broader U.S. occurred in 2007, largely driven by the housing market boom and financial market highs preceding the Great Recession, and again in 2021. The most recent surge can be attributed to the economic rebound following the COVID-19 lockdowns and a flourishing

² Washington State enacted a capital gain-specific income tax and collections the first year were nearly \$800 million. Second year collections have fallen off dramatically. (<https://washingtonstatestandard.com/2024/05/21/capital-gains-tax-receipts-in-washington-tumble/>)

stock market, as well as unprecedented federal stimulus to both businesses and households.

FIGURE 3. Statewide Capital Gains for Adjusted Gross Incomes over \$500k (thousands)



We continue to see tax payments from the first years of the tax due to enforcement actions but expect that most late payments going forward will come from the most recent tax year. Approximately 14% of revenue collected in FY 2024 for both taxes were late payments for prior tax years 2021 and 2022. At this point, it is not clear to what extent this may be attributed to the nature of the tax and how payers may show up in some years but not others based on major life events or other income fluctuations; if taxpayers may simply be late in paying for 2023 or are on a payment plan; or if this reflects larger demographic shifts and high-income earners moving outside of Metro.

As the tax system matures, we anticipate that some of these fluctuations will stabilize. However, due to the inherent nature of this tax, it will consistently exhibit a greater level of uncertainty compared to other sources of tax revenue.

Business Income Tax

Business income tax collections got a slower start than personal income tax collections because some businesses have fiscal years that do not align with calendar years. For instance, businesses with fiscal years ending in October were not required to start filing until the second fiscal year of the tax.

Forecasting business income tax revenue is challenging when historical data is limited. Without a robust dataset, it is difficult to identify long-term trends and cyclical fluctuations within key sectors that contribute to the tax base. Business income is inherently variable, often influenced by national or global market dynamics, industry-specific developments, and broader economic conditions such as recessions or booms.

Forecasting corporate income tax revenue has always been more complicated compared to other taxes due to the complexity of corporate tax codes as well as the various entity types (e.g., C-corp, LLC, Partnership, etc.). Furthermore, because business taxes are collected on a market-based approach, SHS business tax collections are based not only on the amount of profits but also on the share of a business' sales that occur inside of Metro. This means that changes in a company's profits may not automatically lead to an increase or decrease in the taxes they owe.

LOCAL ECONOMIC CONDITIONS

The Portland Metro Area has seen slower economic growth compared to the rest of Oregon and the nation. While regional unemployment remains low, employment growth in the metro area has lagged behind its historical average. Throughout 2024, Portland has consistently ranked at or near the bottom in job growth among similarly sized metro areas across the country.

The state of the local economy plays a key role in our forecast, as we anticipate limited growth in the types of income that drive the variability of SHS revenue collection. Capital gains represent the largest opportunity for income tax revenue growth, and this source is particularly sensitive to slowed business and economic activity.

FORECAST ASSUMPTIONS AND RISKS

This five-year forecast assumes that the Federal Reserve will continue to adjust interest rates in a way that provides the economy with some flexibility while preventing a recession. However, due to the sensitivity of the tax system to economic shifts and the relative newness of these taxes, even small changes in the economic outlook could lead to significant variations in projected collections.

National and statewide economic trends influence SHS tax revenues. The figure below shows the history and forecast for selected national and statewide model inputs. These inputs call for slow growth but no downturn. Given the volatility in the history of these time series, we can expect that the actual experience will be less “smooth” than the current forecast. **There is not a forecast of a recession, but local conditions are expected to continue to be slightly worse than the nation in terms of economic growth, at least in the near term.**

APPENDIX

This section provides summary statistics for SHS tax collections through October 2024.

Figure A.1: Percent Resident Vs Non-resident Personal Income Tax Filers

This figure shows how many personal income taxpayers filed as full year residents and non-residents. Most filers in each tax year have been full year residents.

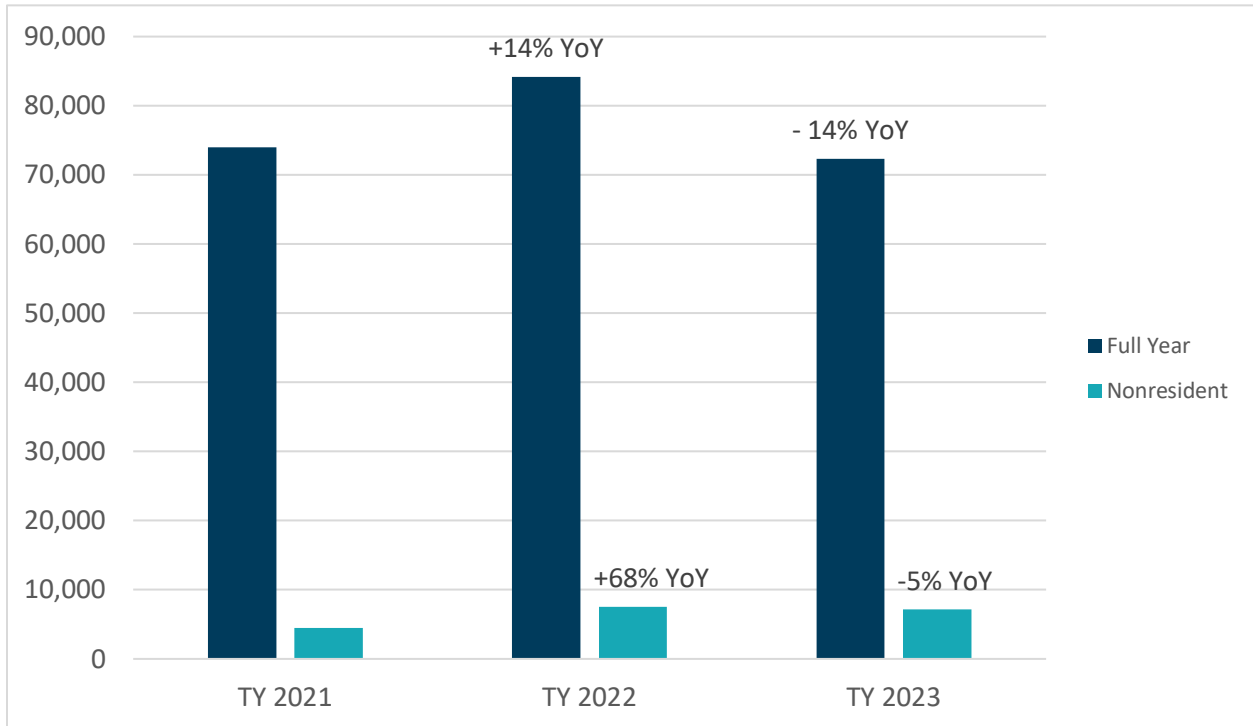


Figure A.2: Number of Personal Income Tax Filers by Taxable Income Group

The majority of filers have taxable incomes between \$125,000 and \$500,000. A sizeable number of filers did not meet the SHS tax threshold but are included in data provided by the Portland Revenue Division. There are likely several reasons for this, among them are the following: 1) These taxpayers did not actually pay any taxes but filed due to overcaution or confusion. 2) These taxpayers did pay taxes and were owed a refund. 3) These taxpayers come from dual income households where the primary filer does not meet the income threshold but withholds taxes for both taxpayers in the household.

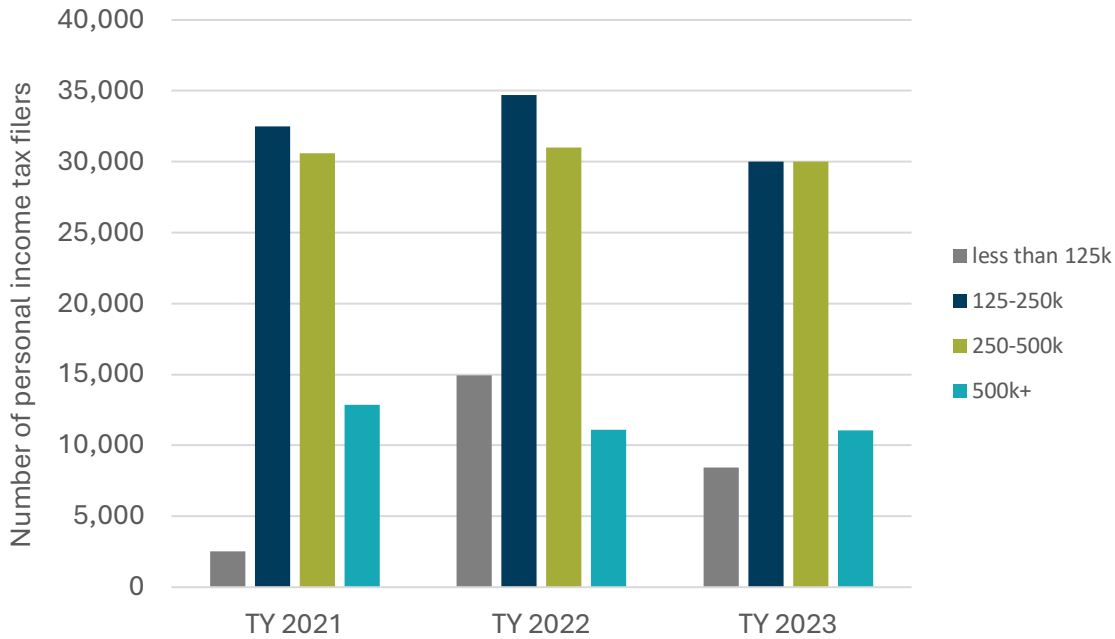


Figure A.3: Number of Business Income Tax Filers by Entity Type

The following bar chart shows the number of business tax filers by business entity. Corporation and S-corporations make up the majority of business tax filers in each tax year.

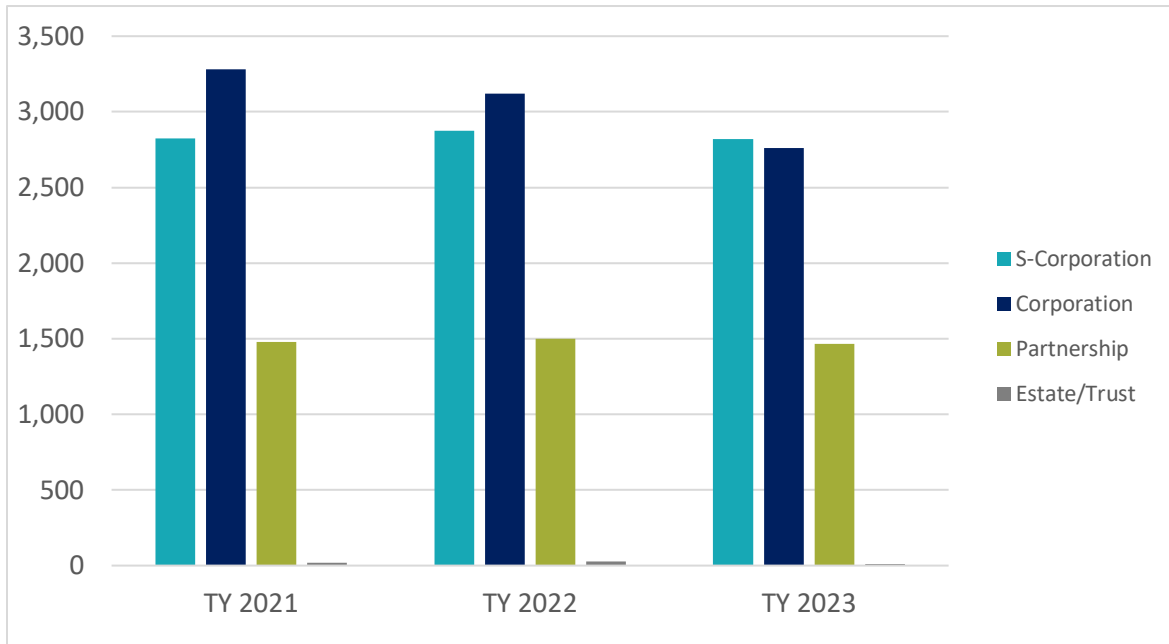


Figure A.4: Percent of Total Revenue Collected by Tax Type

The graph below illustrates the proportion of total revenue collected from each SHS account type (personal or business). For the last two fiscal years, personal income tax has made up 55% of total SHS revenue although there is some overlap between the two account types as those making income through a Non-C Corp (pass through income) may claim it as a deduction on their personal income taxes.

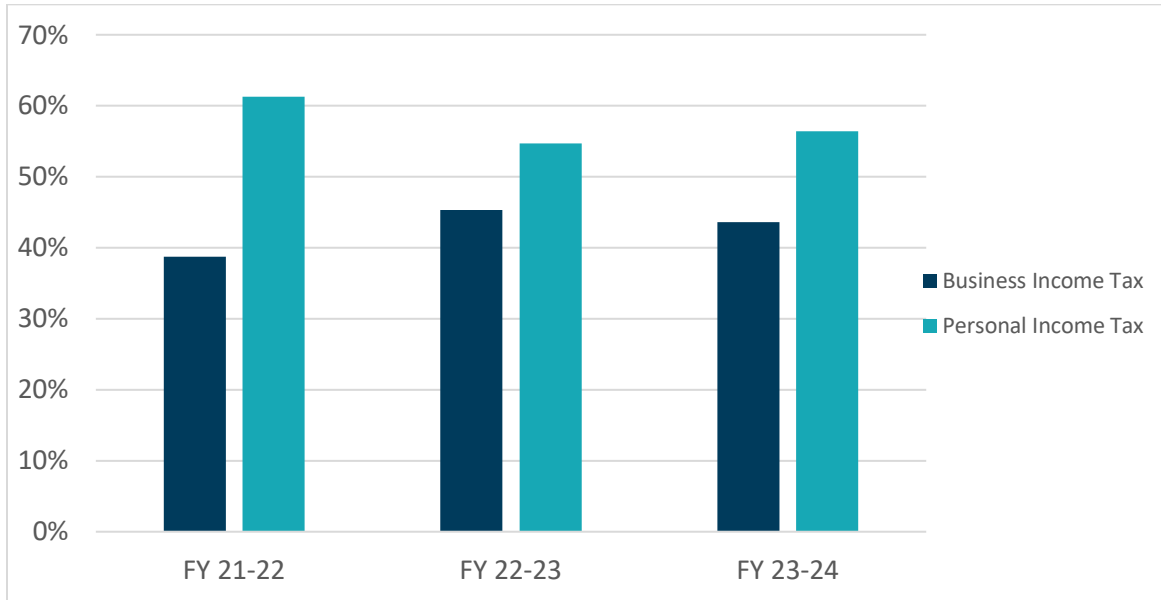
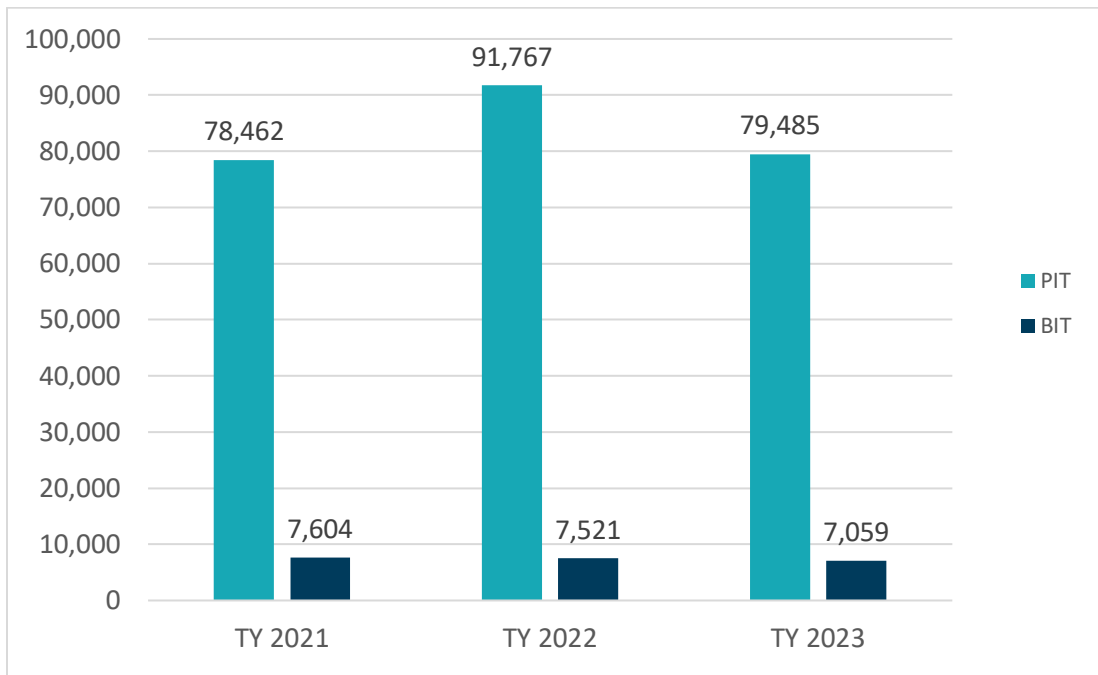


Figure A.5 Total Number of Filers by Tax Year

For the past three tax years the number of SHS personal tax filers has ranged from 78,000 to 92,000 while the number of business tax filers has varied less at 7,000 to 7,500 filers. The jump in number of filers for 2022 has two possible reasons. First, in 2022, heightened taxpayer awareness could have led to a significant rise in PRO filings and e-filing submissions in the City of Portland. Additionally, the City anticipates an increase in 2023 filers due to its noncompliance campaign, bringing the number of filers for the past two tax years closer in alignment.



Metro Regional Capacity Team's PSH Technical Assistance Demonstration and Research Project

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. Discussion

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

Guiding principles: Regional Capacity Team

Collaborate
with county
partners

Avoid
duplication

Add value to
the system

Find
opportunities
to regionalize
TA and
training work

RFQu 4269: new TA consultants

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

Project guiding values and goals

Advance racial equity

- Develop best practices to provide consistent, quality PSH services to clients of color
- Prioritize culturally specific PSH service provision; goal to provide TA services to 3 culturally specific providers and 1 culturally responsive provider to project

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

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 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

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)	Winter 2025 – Strategy created (with consultant – see above)	This is ongoing work in collaboration with the consultant, who will be brought on in winter 2025.
Contract with external communications experts to help design campaign	Metro staff (communications)	Early Winter 2025 – RFQU released	The RFQU is being finalized now. It is expected to be released Winter 2025.

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

Category 2: Financial and data transparency and accountability

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

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

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

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

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

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

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

support clearer tracking on progress			
Strengthen regional methodologies for contextualizing SHS outcomes in relation to overall regional and county-level need	Metro staff (oversight and accountability)	Ongoing	<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>June 2024 – Annual reporting template updated</p> <p>October 2024 – Quarterly reporting template update</p> <p>Fall 2024 – Data use agreement executed</p> <p>February 2025 – 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)	Ongoing	<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)	Ongoing	<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>
---	--	----------------	---

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

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

Task	Lead(s)	Timeline and deliverables	Progress to date
Support the collection and analysis of process and outcome metrics	Metro staff (oversight and accountability)	<p>October 2024 – Template updated</p> <p>February 2025 – 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>May 2024 – IGA executed with PSU</p> <p>Fall 2024 – Monitoring policies finalized</p> <p>Winter 2025 – 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)	Ongoing	The Metro housing department hired an equity manager in February 2024. The department is working to develop a process for utilizing a racial equity lens tool (RELT) for all decision-making across the department and a framework for assessing the department's process toward achieving its equity goals. Once a more detailed timeline is developed, it will be shared.

Category 3: Workforce and capacity issues

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

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

Task	Lead(s)	Timeline and deliverables	Progress to date
Develop a regional work plan	Metro staff (regional capacity)	<p>July 2024 – Regional capacity team fully staffed (6 FTE)</p> <p>November 2024 – Draft recommendations to TPCB</p> <p>December 2024 – Informational presentation to SHSOC</p> <p>March 2025 – 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
------	---------	---------------------------	------------------

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>June/July 2024 – Progress Update: Homebase National scan and preliminary concepts presented to TCPB along with County updates</p> <p>February/March 2025 – Update provided to SHSOC</p> <p>Spring/Summer 2025 – 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>Streamline county administrative practices: Work collaboratively with the counties to support the development of systems for managing procurements, contracts and spending that match the urgency of the crisis. This includes:</p> <ul style="list-style-type: none"> • Creating more nimble and responsive administrative practices that are able to leverage the SHS fund’s unprecedented flexibility • Streamlining contract administration practices to better support provider capacity and expedite program implementation • Promoting payment practices that provide up front funding to support program start-up costs and expedited payments during implementation, particularly for small, emerging and culturally specific providers 			
Task	Lead(s)	Timeline and deliverables	Progress to date
Identify needs within current systems	County partners		The counties recognized the needs and improved their contract administration processes. Washington County made improvements in FY24 to streamline the invoice process and reduced the average invoice processing time down to 18 days. Clackamas County reported that in FY 2023-24, Housing and Community Development paid 82%

			<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>
--	--	--	--

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>July 2024 – Landscape review complete</p> <p>January 2025 – Update provided to SHSOC</p> <p>February 2025 – 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"> Monitor cross-sector alignment and programming to assess the need for regional strategies to support integration of wraparound supports such as employment, workforce and education 			
Monitor and assess program areas that did not meet regional or county-level year-two goals	Metro staff (oversight and accountability)	Fall 2024 – Monitoring policies finalized Winter 2025 – Monitoring to begin	<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>February 2024 – Updated annual work plan template released</p> <p>September 2024 – FY25 work plans finalized</p> <p>October 2024 – Updated quarterly reporting template released</p> <p>February 2025 – 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.



Housing Communications Monthly Report – November 2024

The Housing Department's Communications team is working on several stories across Metro news, social media, paid community media, email marketing and earned media.

Metro News

[“I never thought this would happen to me”: When homelessness happens later in life](#)

Highlight: *“By now, the predicted tsunami has arrived: about 50% of single adults experiencing homelessness are age 50 or older, up from only 11% in the early 90’s. And more people are experiencing homelessness for the first time in their later years than ever before.”*

[Beaverton opens its first year-round homeless shelter](#)

Highlight: *“The new shelter was made possible in part with \$4.8 million from Metro’s supportive housing services fund. The fund will also provide \$1.2 million per year for services, including housing navigation so guests can transition into stable housing. Local nonprofit Open Door HousingWorks — which has 40 years of experience providing services in Washington County — will operate the shelter.”*

[Meridian Gardens offers new beginnings in Southeast Portland](#)

Social media

The communications team published content related to the [2024 supportive housing services annual reports](#), [Veterans Day](#) and [gratitude to voters on Thanksgiving](#), alongside standard social coverage of housing events, including affordable housing and shelter.

Email marketing

Metro Housing’s monthly email newsletter covers recent affordable housing bond and supportive housing services events, Metro News stories, and housing news from the greater Portland region as well as occasional national housing topics. The newsletter is garnering above-average engagement compared to industry standards for email marketing.

[November’s Metro Housing Newsletter](#) included a profile of a peer support specialist Webster, who works with veterans and others at Findley Commons housing community as well as the 2024 SHS annual reports.

[October’s Metro Housing Newsletter](#) focused on Metro’s *Our Big Backyard* magazine and green space in affordable housing developments.

Community voices photo project

Nine residents in the bond-funded Terrace Glen Apartments in Tigard participated in a six-session workshop led by PSU professor and artist Emily Fitzgerald, exploring the meaning of "home." Their final projects will be on display at Blue Sky Oregon Center for the Photographic Arts in December. See [Blue Sky’s website](#) for hours and details.



Earned media

November print/online stories: 8

Print highlight:

[Metro helps fund several newly opened housing and service facilities](#) - Street Roots

This was the result of a pitch made to the reporter suggesting a story that illustrates the volume of investments.

“Metro’s affordable housing bond and SHS funds made all four of these buildings and resources possible. ... Looking to the future, Metro is considering ways to increase affordable housing as the need exceeds availability. The National Low Income Housing Coalition states that the state of Oregon has a shortage of 102,760 rental homes that are affordable and available for extremely low-income renters.”

November TV stories: 6

This represents the number of unique station stories, not the number of times they aired. Many of these stories aired on morning, afternoon, prime time and late-night shows.

Broadcast highlight:

[Portland neighbors, non-profits feeding the homeless on Thanksgiving ‘a good way to love people’](#) - KOIN

This was an exclusive holiday-themed pitch that Metro made to KOIN.

“At Francis and Clare, a new permanent supportive housing program in Portland, residents like Henry Johnson are finding new beginnings.” - Anthony Kustura, reporter

SHS report coverage

In addition to groundbreakings and openings, the release of the SHS annual reports also garnered coverage from The Oregonian/OregonLive and Portland Tribune. Metro put out a press release related to these reports and supplied information to the reporters for these two stories.

- [Homelessness is increasing faster than Portland-area counties are moving people into housing](#) - The Oregonian
- [Reports: Affordable housing crisis and homelessness increasing, despite government efforts](#) - Portland Tribune

Movie theater ads

A set of slides that highlight the affordable housing bond and supportive housing services will continue being displayed in local independent theaters throughout the coming months.



Housing & Community Development

Public Services Building
2051 Kaen Road
Oregon City, OR 97045

Ph. 503-655-8591
Fax 503-655-8563
www.clackamas.us

Date: December 5, 2024

To: Mike Savara and Dr. Mandrill Taylor, Supportive Housing Services Oversight Committee Co-Chairs

RE: Response to letter regarding Population A and B financial expenditures

Clackamas County remains committed to implementing programs to serve the priority populations as identified and defined by the Supportive Housing Services (SHS) Measure. As the county's SHS-funded programs continue to grow, we remain focused on ensuring compliance with the requirement that 75% of funding is designated to serving Population A, through programs to address chronic homelessness, and with 25% of the funding designated to serving Population B, through programs to prevent or rapidly resolve homelessness. We support the action items identified in your letter to work collaboratively in achieving regional alignment, and we are eager to work closely with our regional partners to continue ensuring SHS-funded programs are achieving the intended outcomes.

FY 2023-24 Financial Reporting

In its FY 2023-24 Annual Report, Clackamas County strived to provide a detailed breakdown of Population A and B investments and followed the guidance provided by Metro in the annual report template. While the reported breakdown did not adhere to Metro's specific format, it included the relevant information at a finer level of detail to facilitate a deeper level of analysis.

The format provided by Metro aggregated several program types into single categories, such as shelter and outreach into safety on/off the street, and eviction prevention and rapid rehousing into short-term housing assistance. The data provided in Clackamas County's FY 2023-24 Annual Report breaks these four program types out to provide the public and the Supportive Housing Services Oversight Committee (SHSOC) with a finer level of detail on the spending and populations served by these programs, as each has a distinct role in the homeless services continuum. Clackamas County's FY 2023-24 Annual Report rolled up Regional Long-term Rent Assistance (RLRA) and RLRA Administration into the Permanent Supportive Housing (PSH) category because RLRA is a key component of our PSH model and serves the same population. If RLRA and PSH services had been separated, as requested in the template, it would have inaccurately reported duplicate households across these two services.

The Population A/B financial breakdown provided in the FY 2023-24 Annual Report did not include other program categories that the population split does not apply to, such as Systems Infrastructure or Program Operations, as these were already provided in the financial report. Providing these other figures a second time when a Population A/B split is not applied did not appear to be necessary and risked confusing readers who may be unfamiliar with why a split is not applied to these categories. Readers can locate this information in Attachment I on page 83. The Population A/B Financial Data provided in the Annual Report is presented at a

sufficient level of detail to be rolled up into regional reporting and provides opportunities to regionalize the spending data at an even finer level of detail than requested in the report's template.

We are excited to engage with our regional partners further to streamline all financial reporting and enhance transparency for the public and SHSOC to better assess how SHS funding is serving the priority populations.

Current Barriers to Implementation

- **Workgroup Coordination and Resource Strain:** The lack of coordination, coherence, consistency, and understanding of county programs across the Metro-led workgroups, along with Population A/B reporting expectations, and additional Metro Data Sharing Agreement operational preparation, is placing a heavy strain on our limited resources and staff. Streamlining these efforts and clarifying expectations would help better allocate resources to Metro's compliance requirements and allow staff to also manage their day-to-day workloads that primarily involve service delivery to the community.
- **Lack of Clarity:** On October 18th, Clackamas County sent an email to Metro with the county's Population A/B eligibility form, the housing assessment and vulnerability index, Release of Information form, and the fillable Population A/B form that are used for SHS-funded programs. However, Metro has not provided clear, specific, and actionable feedback on how our current form is non-compliant or different from other jurisdictions. We have not received an account of regional differences in data collection and implementation or the degree of alignment across the regions.
- **Administrative Burden in Implementation:** The counties have all previously expressed that implementing the requested changes to the way Population A/B data is collected and subsequent changes to the Population A/B form would impose a significant administrative burden on county and service provider staff. Any changes need to achieve specific and attainable objectives and be implemented with a realistic timeline that does not place an undue strain on contracted service providers.

Requests for Support

Clackamas County staff have identified a series of requests that, if implemented, would greatly assist with the implementation of regional priority population practices.

- **Standardized Guidance and Detailed Feedback:** Metro should provide clear and consistent guidance for updates that is informed by deep understanding of county programs and practices, including specific details that program, fiscal, and technical staff could use to make changes in templates, eligibility forms, and HMIS. This guidance should be easy to follow, consistent, and measurable to ensure the updates are meaningful, accurate, and transparent, and don't add excessive administrative burden. Additionally, detailed and timely feedback on existing forms and practices will greatly assist our ability to implement changes.
- **Community Training and Technical Support Needs:** While Clackamas County Coordinated Entry system can manage training our in-house and entry point assessors, data collection at all project entry points requires clear and consistently updated training materials, documents, and technical guidance.

Assistance in providing this support would be especially helpful for different program types and ensuring timely updates to Population A and B data.

- **Outcomes Focused Changes:** Efforts should strike the right balance between yielding meaningful value and not creating undue, cumbersome, or unnecessary reporting requirements. When uniform data reporting cannot be obtained, alternative methods—such as attestation, narratives, qualitative assessments, scoring, sampling, or other low-barrier approaches approved by the committee—should be explored.
- **Utilize Existing Resources:** The Homebase Coordinated Entry Workgroup is already doing important work in these areas, particularly in operations and planning. Regional collaboration is key to maximizing resources and scaling successful solutions, while aligning timelines and meetings across stakeholders to lessen the strain on county resources and ensure steady progress on Population A/B initiatives.

Next Steps

We greatly appreciate the opportunity provided by the SHSOC Co-Chairs to share our barriers to implementation and requests for support. Clackamas County is eager and ready to engage with our regional partners on finalizing a consistent regional methodology for how Population A/B data is reported.



To: Mike Savara and Dr. Mandrill Taylor, Supportive Housing Services Oversight Committee co-chairs

Date: November 29th 2024

RE: Response to co-chairs communication "Population A and B Financial Expenditures"

Overview

Following the tri-counties submission of FY 2024 SHS Annual Reports, the SHS Oversight Committee began their official review of the content to identify questions and plan for the upcoming regional SHS report their committee is tasked with generating. After further review, the SHS Oversight Committee co-chairs shared a letter with SHS implementation partners across each jurisdiction highlighting expectations for Population A/B reporting and outlined action items for the tri-counties and Metro to complete together. This memo reflects Multnomah County's responses to the first identified action item which detailed the following next steps.

Action Item #1: Identify Current Barriers by December 2nd

- Each county should submit a brief report by the next SHSOC Meeting on December 2nd, 2024, outlining any active barriers to implementing the updated Population A/B definitions, financial reporting, or data alignment.
- If technical support from Metro remains an issue, specify the areas where assistance is needed. If other challenges have emerged, describe these issues with detail to allow Metro to provide appropriate support.

We appreciate the clear expectations outlined in the letter as this guidance will support us in obtaining further clarification needed to address several barriers we are experiencing in adopting these changes.

Current Barriers & Concerns:

- **Regional Consistency:** We are uncertain about the extent to which the definition of Population A/B differs across the region. A clear understanding of regional variations is crucial for effective coordination and data analysis.
- **Lack of Clarity:** We are unclear how our current Population A/B intake form (sent to Metro on 10/17/24) deviates from the updated definition. Despite our request on 10/17/24, Metro

has not provided specific feedback on our form. This lack of clarity hinders our ability to make necessary revisions.

- **Administrative Burden:** As outlined in the Tri-County Coordination meeting on 10/16/24, and reiterated by our local partners, implementing the change in the way the Population A/B data is collected and any change to our current Population A/B form presents a significant administrative burden. This impacts various aspects of our operations, including HMIS administration, training, assessments, analytics, reporting, and coordination with partner agencies.

Specific Requests & Technical Support Needed:

- **Detailed Feedback:** We request a detailed analysis of our current Population A/B intake form, highlighting specific areas of non-compliance with the updated definition.
- **Implementation Support:** We need support in addressing the administrative challenges associated with this change. This could include:
 - Clear guidance documents and training materials.
 - Technical assistance with HMIS integration and data migration.
 - Financial resources to support staff training and system updates.
- **Regional Alignment:** Please provide a clear overview of how the Population A/B definition is being implemented across the region, including any variations or exceptions.

Additional Considerations:

- **Competing priorities:** We are committed to implementing the updated definitions; however, we are currently managing numerous competing priorities, Metro Monitoring, Metro Data Sharing Agreement, New Metro Quarterly Template and this potential change to the Population A/B definition. All of these efforts have a significant impact on staff who are currently impacted by other bodies of work. Clear guidance and support from Metro are essential to prioritize and effectively implement these changes.

We appreciate your prompt attention to these concerns and look forward to your collaboration in ensuring a smooth transition to the updated Population A/B definitions.



Date: December 2nd, 2024

To: Mike Savara and Dr. Mandrill Taylor, Supportive Housing Services Oversight Committee
co-chairs

From: Nicole Stingh and Jes Larson, Washington County Homeless Services Division

RE: Population A/B Reporting

Washington County's implementation the SHS program remains committed to serving the priority populations as described by the measure. The program seeks to achieve a balance of investing 75% of funding designed to serve Population A through programs that end chronic homelessness, with 25% of funding designed to serve Population B with programs that prevent or resolve homelessness for households who experience housing instability primarily for economic reasons. The proxy of Population A/B is the regionally established process to determine if our work is upholding these commitments. We appreciate your letter and the spirit of collaborative problem solving you bring forward as we collectively work to uphold our commitment to voters and center the people in need.

Reporting Alignment

In the Population A/B reporting included in the Fiscal Year 2023-24 annual report, Washington County provided financial and reporting detail above and beyond requirements to clearly identify how costs of services differ between Population A and B. Our A/B reporting followed the guidance provided by Metro in the annual report template.

The A/B information provided in Washington County's annual report can be rolled-up into the regional categories, however Washington County opted not to share the data this way because of potential errors that it would have created in our reporting. First, we broke apart the shelter and outreach categories, because different percentages of A and B populations were served in these programs which would not have been shown in the rolled-up data. Next, we combined the financial data for households served with our HCMS and RLRA programs because these households are the same. If the data had been separated in the new reporting template, we would have inaccurately shown duplicate households being served. Last, although the System Support and Administrative costs were not shown in our AB reporting, this information is readily available elsewhere in our annual report and could be included in regional AB reporting. However, we think it is important to revisit the merits of attributing these program costs to either A or B households.

It's important to note that a new financial reporting tool was created by Metro's finance team this year in addition to the Annual Report Template guidance created by Metro's program team. Washington County encourages additional discussion about how to overlay financial reporting with the less 'black and white' programmatic reporting assumptions built into that tool. We are confident

that working together, the jurisdictions can effectively and accurately braid our financial reporting with programmatic reporting to better understand A/B outcomes in our county systems and the regional program.

Definition and Data Alignment

After conversations with the counties and Metro that occurred in October, Washington County does not have concerns with the definition of Population A/B. Metro's guidance on Population A/B intake is modeled after the process used in Washington County. Recently, the definition was updated to include rent burden considerations for Population B households. Washington County has begun to operationalize this change in the definition, however we still have some time consuming, implementation work with our partners before the data can be collected to reflect this definitional change.

Next Steps

Washington County is eager to continue conversations on Population A/B in partnership with Metro, the Oversight Committee and our community-based providers to ensure accurate data collection and reporting as we continue to evaluate and improve the community impact of the regional measure.

We have some additional questions to better understand concerns stated in your letter regarding 'alignment in allocation methodology' and 'capturing people served outside of defined program categories'. Nonetheless, we agree that there are areas for improvement in this new excel reporting tool and that further analysis conducted by Metro to understand cost differences in serving Population A and B between programs will be helpful.

In these future conversations, Washington County also invites the region's partners and our oversight committee to revisit the policy objectives for establishing the Population A and B funding split and these reporting proxies that evaluate our implementation. In the fourth year of program implementation, now is the time to recommit to our shared objectives of ending chronic homelessness and advancing racial equity through upstream preventative measures that especially reach communities of color. Let's evaluate how well our Population A and B reporting methods are helping to measure, track, and achieve these goals, and what more we need to do together to uphold our commitments to voters to make homelessness rare and brief through the investment of these SHS resources.