



OFFICE OF COUNTY COUNSEL

PUBLIC SERVICES BUILDING
 2051 KAEN ROAD | OREGON CITY, OR 97045

Stephen L. Madkour
 County Counsel

Kathleen Rastetter
Scott C. Ciecko
Amanda Keller
Nathan K. Boderman
Shawn Lillegren
Jeffrey D. Munns
Andrew R. Naylor
Andrew Narus
Sarah Foreman
 Assistants

January 20, 2022

Board of County Commissioners
 Clackamas County

Members of the Board:

Approval of Metro Supportive Housing Services Intergovernmental Agreement. Total value is based on tax revenue received. No County general funds are involved.

Purpose/Outcomes	Approve execution of an intergovernmental agreement (“IGA”) with Metro Regional Government (“Metro”) for the distribution of funds collected from Metro’s personal and business income tax to fund supportive housing services (“SHS”) programs.
Dollar Amount and Fiscal Impact	Dollar amount is estimated to be \$240 million over the course of the ten year term of the IGA. An exact amount is uncertain and depends on the actual supportive housing services (“SHS”) personal and business income taxes collected by Metro.
Funding Source	Metro’s SHS income tax revenue.
Duration	Upon execution and through June 30, 2031
Previous Board Action	<p>The Board has discussed SHS issues and revenue distributions on numerous occasions.</p> <ul style="list-style-type: none"> • The local implementation plan was approved in policy session on April 13, 2021. • The quarter 1 report was presented at Administrator Issues on December 7, 2021
Strategic Plan Alignment	<p>1. <i>How does this item align with your department’s Strategic Business Plan goals?</i> Assists the County and the Housing Authority of Clackamas County in addressing houseless issues and providing sustainable and affordable housing</p>

	2. <i>How does this item align with the County’s Performance Clackamas goals?</i> Ensure safe, healthy, and secure communities
Counsel Review	Date of Counsel review: 01/10/2022 Initials of County Counsel performing review. ARN
Procurement Review	Not processed through procurement. This is an exempt transaction.
Contact Person	Rod Cook, Vahid Brown, Elizabeth Comfort, Emily Klepper, and Andrew Naylor

Background:

On February 25, 2020, the Metro Council adopted Ordinance No. 20-1442, which imposed business and personal income taxes to fund SHS programs. At the same Metro Council meeting, the Metro Council adopted Resolution 20-5083, which referred Ordinance No. 20-1442 to voters within the Metro jurisdictional boundary for approval. The Multnomah County Elections Division designated Ordinance No. 20-1442 as Ballot Measure 26-210 (the “Measure”), and it was placed on the May 19, 2020, primary election ballot and approved.

The Measure provides that SHS income tax revenue collected by Metro will be distributed to Multnomah, Washington, and Clackamas County, in the amounts set forth in the Measure. The Measure provides a regional opportunity to confront the true scale of the region’s housing crisis.

By making unprecedented investments that center racial equity and provide the flexibility necessary to offer truly participant-centered approaches to meet the needs of our un-housed neighbors, Clackamas County can reduce rates of chronic and short-term homelessness, and racial disparities.

The revenues from the Measure will be used to develop, implement, and fund each county’s SHS program in accordance with each county’s Local Implementation Plan (LIP). The Clackamas County LIP is a guiding document for the SHS program tailored to meet the unique needs of Clackamas County.

Following approval of the Measure, Metro and Multnomah, Washington, and Clackamas counties began negotiation of an IGA that would establish roles, responsibilities, and obligations of the parties in the collection, distribution, use, and oversight of the SHS funds.

During the negotiations, the parties entered into an interim funding agreement that allowed for SHS funds collected by Metro to be distributed to the counties for use in accordance with the Measure.

The interim funding agreement expires on January 31, 2022. The attached IGA will serve as the long-term, final agreement governing the collection, distribution, and use of the SHS income tax revenue collected by Metro and distributed to Clackamas County.

The attached IGA was the result of extensive negotiations between Metro and the three counties. While each county will execute a separate IGA with Metro for use of the SHS funds, those IGAs will be substantially the same and contain the same substantive terms and conditions. In general terms, the IGA includes the following:

- Identification of the roles and responsibilities of Metro and Clackamas County with respect to collection, distribution, planning, budgeting, use, reporting, and accounting of the SHS funds;
- Establishment of committees to aid in the implementation of the SHS program, including an executive committee and a financial review team that will provide analysis and advice to the parties with respect to use of the SHS funds;
- Establishment of detailed processes for addressing and resolving potential disputes;
- Clarification of roles and responsibilities with respect SHS regional implementation including the Regional Oversight Committee and the Tri-County Planning Body.

Execution of the IGA will ensure the necessary detail, clarification, and coordination to achieve the goals of the Measure and support Clackamas County's SHS programs.

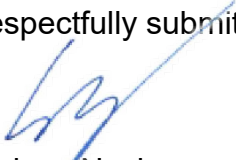
Recommendation:

Staff requests this Board approve the IGA in a form substantially similar to the attached.

However, because each of the aforementioned counties has a different review and approval schedule, non-substantive and non-material changes could occur prior to finalization of each county's IGA.

Because of these differing schedules, staff further requests that the Chair of the Board of Clackamas County Commissioners be delegated authority to sign the IGA provided it is in substantially the same form as attached. This will provide necessary flexibility in the event non-substantive, non-material changes are identified following this Board's approval of the IGA. It will further ensure that the IGA signed by Clackamas County matches the ones executed by the other two counties. Staff does not anticipate any changes will occur.

Respectfully submitted,



Andrew Naylor
Assistant County Counsel, Senior

**SUPPORTIVE HOUSING SERVICES
INTERGOVERNMENTAL AGREEMENT**

This SUPPORTIVE HOUSING SERVICES INTERGOVERNMENTAL AGREEMENT (“Agreement”) is made by and between Clackamas County, a political subdivision of the state of Oregon (“Partner”), and Metro Regional Government, a municipal corporation of the state of Oregon (“Metro”), each a “Party” and collectively as “Parties”. Capitalized terms used in the Agreement are defined in **Section 1**.

RECITALS

- A. On February 25, 2020, the Metro Council adopted Ordinance No. 20-1442, which imposed business and personal income taxes to fund a supportive housing services program based on its finding that areas within Metro’s jurisdictional boundary (generally, the urbanized areas of Multnomah, Washington, and Clackamas counties) face a severe housing affordability and homelessness crisis that endangers the health and safety of thousands of Metro’s unhoused neighbors;
- B. Also at the Metro Council meeting on February 25, 2020, the Metro Council adopted Resolution 20-5083, which referred the business and personal income taxes in Ordinance No. 20-1442 to voters within the Metro jurisdictional boundary for approval. The Multnomah County Elections Division designated Ordinance No. 20-1442 as Ballot Measure 26-210, and it was placed on the May 19, 2020, primary election ballot;
- C. On May 19, 2020, the Metro area voters approved the Measure, thereby approving the business and personal income taxes in Ordinance No. 20-1442;
- D. The ballot title to the Measure “direct[s] regional funding to local services agencies, require[s] community engagement to develop localized implementation plans[, and] ... [a]llocate[s] funds to counties by estimated revenue collected [from the Income Taxes] within each county ...”;
- E. On December 17, 2020, Metro codified the Income Taxes in new Metro Code Chapters 7.05, 7.06, and 7.07, the programmatic elements of the Measure in Metro Code Chapter 11.01, and the Regional Oversight Committee elements in the new Metro Code Section 2.19.280; provided, however, that nothing herein will be construed as an admission that the Counties are subject to Metro Code;
- F. The Measure at Section 6 provides that each County in the Region will work with Services Providers and community partners to develop and implement programs that respond to the unique needs in their communities, as outlined in their Local Implementation Plan, and that Counties will invest SHS Revenue to achieve program goals and demonstrate outcomes (also as defined by its Local Implementation Plan), and to achieve goals and metrics for the Region once they are established by the TCPB;
- G. On June 17, 2021, the Metro Council approved Partner’s Local Implementation Plan, which was enacted in accordance with the requirements of the Measure;

- H. The Income Taxes became effective on January 1, 2021. Metro began receiving initial tax revenue in Spring of 2021;
- I. The Measure contemplates that Metro will receive SHS Revenue and then disburse it to the Counties throughout the tax year, not including the amounts reasonably needed by Metro for the cost of tax collection and administration;
- J. The Parties both interpret the reference to “funds provided for Supportive Housing Services by [a] local government” found in the Measure at Section 9 to refer to “unrestricted” funds, such as revenue collected by a County from local option taxes and budgeted by that County for SHS, and to not refer to “restricted” funds, such as funds provided under federal or state grant programs, borrowed funds, or funds received from one or more third-parties under contract;
- K. Before the Parties executed this Agreement, Metro and the Counties executed a Revenue Sharing Agreement, and four extensions to that agreement, under which Metro began allocating funds from the Income Taxes to the Counties to pay for Supportive Housing Services consistent with each of the County’s Metro-approved Local Implementation Plan to allow them more time to negotiate this Agreement;
- L. The Revenue Sharing Agreement will be terminated on the earlier of this Agreement’s Effective Date or January 31, 2022;
- M. As of the Effective Date, Metro is party to a validation action in the Oregon Court of Appeals (Case No. A176666), which was appealed from a ruling in Multnomah County Circuit Court (Case No. 20CV46617) (the “Validation Action”), in which Metro prevailed. In this Validation Action, certain respondents have challenged Metro’s home rule authority to administer the Income Taxes in a particular manner, primarily how income is sourced. If the respondents are ultimately successful, a court may require Metro to administer the Income Taxes in a different manner, which could affect the individuals and businesses required to pay the taxes and the amounts received by Metro from the Income Taxes. Although any such ruling should not affect the obligations of Partner or the validity of the SHS taxes, the Parties understand that there may be some disbursement disruptions if Metro is required to change the way it administers the Income Taxes, which could include refunds of previously paid Income Taxes. The Parties will work collaboratively to mitigate any disruption; and
- N. As more specifically set forth below, the Agreement sets forth the Parties’ understandings and agreements regarding the use by the Counties of the Income Taxes to pay for supportive housing services consistent with Partner’s Local Implementation Plan.

NOW, THEREFORE, the Parties agree as follows:

AGREEMENT

1. DEFINITIONS.

- 1.1. “Administrative Costs” means those costs for goods or services that benefit Partner’s delivery of SHS as a whole and cannot be attributed specifically to a particular program, as further described in **Section 3.4.2**.
- 1.2. “Administrative Expenses” means Metro’s costs to administer and oversee the SHS program, as more specifically described in **Section 3.4.1**.
- 1.3. “Agreement” means this Supportive Housing Services Intergovernmental Agreement.
- 1.4. “Annual Program Report” means the annual report prepared and presented by Partner as set forth in **Section 7.1.1**.
- 1.5. “Annual Program Budget” means the annually-prepared budget detailing Partner’s Budgeted Program Funds for a designated Fiscal Year, as set forth in **Section 5.5.2**.
- 1.6. “Annual Work Plan” means the annually-prepared plan detailing Partner’s plans for SHS programming in a designated Fiscal Year, as set forth in **Section 5.3**.
- 1.7. “Budgeted Program Funds” means Program Funds anticipated to be received by Partner in a Fiscal Year, as forecast by the Metro CFO in consultation with FRT members, off which Partner’s Annual Program Budget is based. These may include funds budgeted for Partner’s Regional Strategy Implementation Fund, a contingency reserve described in **Section 5.5.4**, and its Administrative Costs, in addition to funds budgeted for programmatic purposes.
- 1.8. “CFO” means a Party’s Chief Financial Officer.
- 1.9. “Corrective Action Plan” or “CAP” means the process and document developed by the Parties to achieve desired SHS program outcomes after it is determined that Partner is not meeting its programming or financial obligations, as set forth in **Section 6.3.5**.
- 1.10. “Counties” means, collectively, the state of Oregon municipal subdivisions of Clackamas, Multnomah, and Washington counties.
- 1.11. “County” means any one of the state of Oregon municipal subdivisions of Clackamas, Multnomah, and Washington counties.
- 1.12. “Effective Date” means the date the Agreement is executed by the Parties.
- 1.13. “Executive Committee” means the body comprised of representatives from the Counties and Metro and tasked with addressing ongoing and specific SHS program implementation improvement needs, as further provided in **Section 8.1**.
- 1.14. “Financial Review Team” or “FRT” means the CFOs for the Counties and Metro, as more specifically described in **Section 6.2**.
- 1.15. “Fiscal Year” or “FY” means the twelve-month period beginning July 1 and continuing through June 30.

- 1.16. “Income Taxes” mean the personal and business income taxes levied by Metro under Metro Code Chapters 7.06 and 7.07, which were approved by the voters in the Measure.
- 1.17. “Local Implementation Plan” or “Plan” means the Partner document that establishes the proposed use of Program Funds and how these uses align with the purposes of the SHS program and Measure, approved by Metro Council and attached as **Exhibit 2**.
- 1.18. “Material Plan Amendment” means a revision to a Metro Council-approved Local Implementation Plan that changes its guiding values, or significantly changes its goals, practices, or investment priorities.
- 1.19. “Measure” is Ballot Measure 26-210, which was approved by voters on May 19, 2020. A copy of the Measure is attached to the Agreement as **Exhibit 1**.
- 1.20. “Metro SHS Work Plan” means Metro’s SHS Work Plan adopted by the Metro Council by Resolution 20-5148 on December 17, 2020, and as amended from time to time. A copy of the Metro SHS Work Plan is attached to the Agreement as **Exhibit 3**.
- 1.21. “Program Funds” means funds available to a Local Implementation Partner, which generally consists of the SHS Revenue minus Metro’s Administrative Expenses.
- 1.22. “Quarterly Progress Report” means the report prepared and presented by Partner as set forth in **Section 7.1.2**.
- 1.23. “Records” means information prepared, owned, used, or retained by a Party, and pertaining to their respective operations and business related to the Agreement that is inscribed on a tangible medium commonly a document, or that is stored in an electronic or other medium and is retrievable in perceivable form.
- 1.24. “Region” means the territory within the Metro jurisdictional boundary as it exists on the Effective Date and any territory later annexed or subjected to Metro governance under state law.
- 1.25. “Regional Strategy Implementation Fund” means a fund created and held by each County for investment in regional goals, strategies, and outcomes identified by the TCPB and as described in **Section 8.3.3**.
- 1.26. “Regional Oversight Committee” or “ROC” means the committee that provides programmatic guidance, monitors programmatic expenditures and evaluates outcomes of the SHS program.
 - 1.26.1. “ROC Charter” means the document, initially attached to the Metro SHS Work Plan as Addendum B, as may be subsequently amended.
- 1.27. “Services Providers” are local housing authorities, cities, and the Counties, to the extent that they provide SHS, and those third-party organizations that Partner contracts with to provide SHS.
- 1.28. “SHS Revenue” means all funds received from the taxes imposed by Metro Code Chapters 7.06 and 7.07 (including delinquent interest and penalties) collected in a given tax year.

- 1.29. “Stabilization Reserve” means a fund created under **Section 5.5.3** to provide funding for Budgeted Program Funds in future years if actual Program Funds fall below budgeted estimates.
- 1.30. “Supportive Housing Services” or “SHS” means homeless prevention, support services and rent assistance that stabilize people experiencing homelessness and housing instability, as further described in the Metro SHS Work Plan and the Measure at Section 4.
- 1.31. “Tri-County Planning Body” or “TCPB” means a body of stakeholders and technical experts convened to develop and implement the Tri-County Plan that will be responsible for identifying regional goals, strategies, and outcome metrics related to addressing homelessness in the Region.
- 1.31.1. “TCPB Charter” means the document agreed to between Metro and the Counties that sets forth the Parties’ performances, rights, and obligations, with respect to the TCPB; the functions of the TCPB; and the manner and practices that describe how the TCPB will operate and be governed.
- 1.32. “Tri-County Plan” is the regional plan prepared by the TCPB that will identify regional goals, strategies, and outcome metrics related to addressing homelessness in the Region.
2. EFFECTIVE DATE, TERM, EXTENSION, TERMINATION. The Agreement is effective as of the Effective Date and continues through June 30, 2031 (“Term”). The Parties may by mutual agreement extend the term of this Agreement beyond June 30, 2031.
- 2.1. TERMINATION. The Parties may jointly terminate this Agreement if they determine that such action is in the public interest. Termination under this provision is effective only upon the mutual, written termination agreement signed by both the Parties. Subject to any negotiated and agreed upon wind down provisions, including those in **Section 2.2**, this Agreement is automatically terminated within 90 days of any of the following:
- 2.1.1. The effective date of any repeal of the Measure by Metro voters;
- 2.1.2. The effective date of any amendment to the Measure by Metro voters, if the amendment invalidates or is otherwise in conflict with a material term of the Agreement and where the conflict effectively invalidates the Parties’ agreement; or
- 2.1.3. A final ruling by a court of last resort that the imposition or collection of the Income Taxes is invalid. This subsection does not apply to any lower court ruling or any ruling that does not invalidate the entire SHS program, including the Income Taxes.
- 2.1.4. If this Agreement is terminated, the Parties will collaboratively develop a plan for an orderly wind-down of the SHS program as set forth in **Section 2.2**. Unless otherwise agreed between the Parties, Partner must deliver to Metro within 60 days

of the termination date all unobligated Program Funds, required reports, and financial data.

The obligations set forth in **Section 9**, and the right in **Section 5.5.4**, survive the expiration or earlier termination of this Agreement, as does Partner's ability to spend down Program Funds where: (a) Partner committed to spend the funds under a contract signed prior to termination; (b) the contract's SHS-related performances extend beyond Agreement termination; and (c) Partner has budgeted to meet the payment requirement(s) with SHS funds.

2.2. WIND-DOWN. The Parties expressly acknowledge and agree that even after a termination or expiration of the Term of the Agreement, Metro may collect Income Taxes and allocate Program Funds to Partner. As a result, the Parties agree to the following wind-down process following termination or expiration of the Term of the Agreement:

2.2.1. PROCESS. The Parties will collaboratively develop a plan for an orderly wind-down of the SHS program with the goal of mitigating the impact that Agreement termination could have on the individuals served by the SHS program and on the Services Providers reliant on Program Funds. Each Party shall bear its respective costs associated with wind-down planning and each will work cooperatively with the other Party in the coordination of efforts. The planning will also identify and address any ongoing program reserve needs (such as for contractual, project-based rent assistance requirements), return of unobligated funds, personnel, capital equipment, workload and any other issues related to winding-down the SHS program.

2.2.2. REASONABLE EFFORTS TO AVOID PROGRAM DISRUPTION. If the Agreement terminates, regardless of the reason, the Parties will make reasonable efforts to prevent undue harm to the Regional homeless services systems, structures, and to those receiving SHS at the time of the termination. The Parties will make reasonable efforts to ensure that such Partner obligations are met in the event the Agreement is terminated.

2.3. SUSPENSION. In the event Metro receives notice of an actual or threatened lawsuit challenging the validity of the Income Taxes, the Parties will work in good faith to minimize the impacts of that lawsuit on current SHS programs. In the event a court of competent jurisdiction issues a judgment that the Income Taxes are invalid, Metro may suspend disbursements of Program Funds to the minimum amount necessary to comply with the applicable court order and, to the maximum extent practicable, avoid SHS program disruption as set forth in **Section 2.2.2**.

3. INCOME TAX COLLECTIONS, ALLOCATIONS, ADMINISTRATION.

3.1. LEVY, COLLECT INCOME TAXES. Except as otherwise provided in **Section 2.2**, for so long as there are uncollected Income Taxes, Metro will collect, or contract with a third-

party to collect, the Income Taxes unless Metro determines that collection is not financially prudent.

3.2. PROGRAM FUNDS DISBURSEMENTS. After the Effective Date Metro will disburse Program Funds to Partner on a monthly basis. Partner recognizes that Metro cannot guarantee any specific disbursement amount given the uncertainties regarding the amount of revenue that Metro will ultimately collect in any given year from the Income Taxes. Unless adjusted according to **Section 3.3** or **Section 3.5**, Metro will allocate Program Funds to the Counties as follows: 21 1/3% to Clackamas County, 45 1/3% to Multnomah County, and 33 1/3% to Washington County.

3.3. PROGRAM FUNDS ALLOCATIONS ADJUSTMENT. After FY 2022-23, the Counties and Metro will work cooperatively to establish a process for a review of the allocation percentages in **Section 3.2**.

3.4. ADMINISTRATION.

3.4.1. ADMINISTRATIVE EXPENSES. After Metro's Income Tax collection expenses are paid, Metro may retain up to 5% of the remaining funds to pay the expenses to disburse the funds and administer and oversee the program. This includes the expenses to convene and support the ROC and TCPB; establish a regional homeless data collection and reporting program; support tri-county regional collaboration; and fund audit expenses. The Parties also agree that Metro cannot use Administrative Expenses to deliver SHS.

3.4.2. ADMINISTRATIVE COSTS. Partner may use Program Funds to pay for its Administrative Costs. Metro recommends, but does not require, that in a given Fiscal Year Administrative Costs should not exceed: for SHS, 5% of annual Program Funds allocated to Partner, consistent with guidelines for similar programs funded by the state of Oregon; and, for administering long-term rent assistance programs, 10% of annual Program Funds allocated by Partner for long-term rent assistance, consistent with guidelines for similar programs funded by the U.S. Department of Housing and Urban Development and the state of Oregon. Partner will support all amounts billed as Administrative Costs by actual costs. Administrative Costs include, but are not limited to:

3.4.2.1. Senior management personnel salaries and benefits (unless they are directly involved in SHS program operations);

3.4.2.2. Administrative staff travel costs;

3.4.2.3. General services such as human resources, accounting, budget development, procurement, marketing, agency audit, and agency insurance;

3.4.2.4. Partner-wide membership fees and dues specific to homeless systems and programs;

3.4.2.5. General Partner facilities costs (including those associated with executive positions), such as rent, depreciation expenses, and operation and maintenance (as part of Partner's direct or indirect cost allocation plan);

3.4.2.6. Equipment rental/purchase, insurance, utilities, and information technology costs that are not program specific but relate to Partner administration as a whole; and

3.4.2.7. Any other costs not specifically attributed to a particular SHS program or program delivery.

3.5. RE-ALLOCATION OF PROGRAM FUNDS AFTER REPUDIATION. Notwithstanding **Section 3.2**, Metro may re-allocate Program Funds withheld from one County and disburse those Program Funds to one or more different Counties in the event that the County whose Program Funds are being re-allocated has anticipatorily repudiated the Agreement, as further described in **Section 10.2.3.6**.

4. USE OF INCOME TAXES.

4.1. PROGRAM FUNDS USE. Partner will use Program Funds to develop and implement its SHS program in accordance with this Agreement and its Plan. Although some portion of each of the Counties are outside of the Region, Partner may only spend Program Funds for SHS provided within the Region. The temporary provision of services outside the Region for a duration less than 90 days for a client who has been living in the Region is permitted after May 1, 2022, if SHS in the Region are not otherwise available to the client. Payments to individuals or businesses located outside the Region are allowed, provided the SHS are delivered within the Region. Recognizing that other unusual situations may arise where expending Program Funds outside the Region may be necessary and appropriate after May 1, 2022, Metro will establish an exception process through which the Counties may seek pre-approval for such expenditures. Partner will reasonably monitor the performances of its third-party Services Providers to ensure their performances under contracts funded, in whole or in part, with Program Funds meet the requirements of this section.

Examples of permitted payments include: rent assistance for housing located in the Region that is paid to a landlord in Seattle; hiring a technical assistant that is located in Ohio, but delivering a service or product to a person or program in the Region; assisting an individual who presents as homeless in Beaverton, but who just got off a bus from New York, and needs help getting back to New York to achieve stable housing.

Examples of prohibited uses of Program Funds include: rent assistance to a person who formerly lived in Beaverton, but has moved to Seattle (even if the landlord is located in Gresham); mental health services delivered at a clinic in North Plains for a client who lives in Tualatin; assisting an individual who presents as homeless in New York to return to Beaverton.

4.2. SPENDING ON INITIAL SHS COSTS. Anticipating receipt of Program Funds, Partner incurred certain expenses and costs associated with providing SHS, building administrative and staffing capacity to provide SHS, and supporting its SHS programs. Partner may pay for these initial SHS costs through transfers of funds, loans, or other forms of financing until sufficient Program Funds are received by Partner, after which

point Partner may use Program Funds to reimburse its initial SHS costs. Metro further agrees that initial SHS costs are not considered a part of Partner's existing SHS program for purposes of the Measure's prohibition against displacement of funds set forth in **Section 5.5.1**.

4.3. DEBT SERVICE COSTS. Metro recognizes that Partner may incur internal or external debt to implement its SHS program. The costs of debt, including debt interest and issuance costs, in which Partner used the debt proceeds solely on SHS program implementation beginning January 1, 2021, or later, are an allowable use of Program Funds and an allowable SHS program cost, provided such debt costs are included in the Annual Program Budget for the Fiscal Years in which the costs are incurred.

5. SHS PLANNING, BUDGETING.

5.1. METRO SHS WORK PLAN. Metro will implement its SHS program in a manner that is consistent with the Metro SHS Work Plan. To avoid ambiguity, and except where a specific portion of the plan is clearly identified and referenced in the Agreement, Partner is not required to comply with any performances, rights, or obligations set forth in the Metro SHS Work Plan.

5.2. LOCAL IMPLEMENTATION PLAN. A Local Implementation Plan is required to describe the priorities and strategies that will shape Partner's use of Program Funds and how these uses align with the purposes provided for in the Measure at Section 3 and the Metro SHS Work Plan. Partner's approved Plan is attached as **Exhibit 2**. Partner agrees to use Program Funds as set forth in its Local Implementation Plan.

5.2.1. MATERIAL PLAN AMENDMENT APPROVAL PROCESS. The approval process for Material Plan Amendments is as follows:

5.2.1.1. Partner develops the Material Plan Amendment using a locally convened community engagement process, as described in the Measure at Section 6, and submits the Material Plan Amendment to its advisory body (i.e., its board of county commissioners) for review and approval;

5.2.1.2. Partner submits the County-approved Material Plan Amendment to the ROC for its review and recommendation;

5.2.1.3. The ROC either recommends to Metro approval or denial of the Material Plan Amendment; and

5.2.1.4. Metro Council then approves or denies the Material Plan Amendment. If denied, Partner must submit a new Material Plan Amendment or initiate the dispute resolution process in **Section 10.1**.

5.2.2. PLAN AMENDMENTS. If Partner seeks a Material Plan Amendment, it must follow the approval process set forth in **Section 5.2.1**. Partner may request that Metro waive the process to implement a temporary Material Plan Amendment upon a Metro finding that a delay would seriously impact Partner's ability to implement the current Plan or adequately address an ongoing service need. A waiver of the

approval process requirement for a Material Plan Amendment is effective for no more than nine months from the date Metro granted the waiver. Partner is not required to amend the goals described in its Plan for the first year of SHS programming. After that first year, changes based on insufficient Income Tax revenue will be reflected in changes to relevant Annual Work Plans.

5.2.2.1. Partner will notify the ROC and Metro of changes to its Plan that are not Material Plan Amendments by submitting a copy of the approved amended Plan. If, after consultation with the ROC, Metro determines the amendment is a Material Plan Amendment, Metro must notify Partner of its finding within 60 days of the submittal. Partner may initiate the dispute resolution process in **Section 10.1** if it disagrees with Metro's determination. If Partner does not, within 30 days of receiving Metro's notification, dispute Metro's determination that an amendment to a Plan is a Material Plan Amendment, then the amendment will not be effective unless Partner obtains approval for the amendment as set forth in **Section 5.2.1**.

5.2.2.2. The Parties acknowledge and agree that, given the nature of Local Implementation Plans, an amendment request under **Section 5.2.2** or **5.2.2.1** should be rare; and, given the very time intensive nature of approving amendments, the Parties will rely on the Annual Work Plan process to make Plan adjustments whenever feasible.

5.2.3. AMENDMENTS TO PLAN SOUGHT BY ROC, METRO. 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. The request must be in writing and otherwise comply with the notice requirements in **Section 11.4** and describe in sufficient detail the purpose for the proposed amendment.

5.2.3.1. Partner will timely respond to a request for an amendment to its Local Implementation Plan and either: (a) agree to draft an amendment to its Plan that is responsive to the request; (b) decline the request for an amendment and explain why the amendment is not needed; or (c) propose an alternative approach that Partner feels is responsive to the purpose described by the ROC or Metro in its proposal. Plan amendments under this **Section 5.2.3** must follow the process set forth in **Section 5.2.2**. If Partner declines the request for an amendment, Metro may initiate the dispute resolution process in **Section 10.1**.

5.2.3.2. The Parties acknowledge and agree that, given the nature of Local Implementation Plans, an amendment request under **Section 5.2.3** should be rare; and, given the very time intensive nature of approving amendments, the Parties will rely on the Annual Work Plan process to make Plan adjustments whenever feasible.

- 5.2.3.3. If Partner fails to timely or adequately respond to a Plan amendment request, Metro may seek dispute resolution.
- 5.2.4. AMENDMENT TO LOCAL IMPLEMENTATION PLAN REQUIRED AFTER TRI-COUNTY PLAN ADOPTED. 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. The Parties recognize and agree that, given the nature of Local Implementation Plans, amendments to the Local Implementation Plan may not be necessary, or should be rare, and that Tri-County Plan directives may more appropriately be incorporated into Partner's Annual Work Plan.
- 5.3. ANNUAL WORK PLAN. 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. Partner will prepare the Annual Work Plan using a template jointly created and approved by Metro and the Counties. In lieu of an Annual Work Plan describing implementation plans for the first Fiscal Year of the Term, Partner will provide, as part of its first Quarterly Progress Report detailed in **Section 7.1.2**, a summary of SHS implementation efforts underway and planned for the balance of that Fiscal Year. Metro will receive and review the Annual Work Plan for consistency with Partner's Local Implementation Plan, and Partner agrees to provide SHS as described in the Annual Work Plan.
- 5.4. METRO BUDGETING.
- 5.4.1. ADMINISTRATIVE EXPENSES. 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. 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.
- 5.4.1.1. SUPPORT FOR OVERSIGHT GROUPS. Metro will annually allocate a sufficient portion of resources to provide the staffing and logistical support required by the Executive Committee, FRT, ROC, and TCPB.
- 5.5. PARTNER BUDGETING.
- 5.5.1. NON-DISPLACEMENT. Partner may not Displace Current Partner-provided SHS Funds with Program Funds received by Metro under this Agreement absent Partner receiving a written waiver from Metro that good-cause exists to permit the requested Displacement. Metro will not unreasonably withhold a waiver. As part of its Annual Program Report, Partner will include a certification as to whether there was a Displacement of Current Partner-provided SHS Funds.

5.5.1.1. OTHER FUNDS. Partner has previously used other funds for the provision of SHS. Some of the funding is County general fund. However, other funds include, but are not limited to, various state or federal grants and other non-general fund sources. Partner will attempt, in good faith, to maintain such funding at the same levels set forth in Partner's FY 2018-19 budget. However, because the amount and availability of these other funds are outside of Partner's control, they do not constitute Partner's Current Partner-provided SHS Funds for purposes of Displacement. Partner will provide Metro with information on the amount of other funds Partner has allocated to SHS, as well as the change, if any, of those funds from the prior Fiscal Year in its Annual Program Budget.

5.5.1.2. TERMS. As used in **Section 5.5.1**:

- a. "Current Partner-provided SHS Funds" means Partner's general funds currently provided as of FY 2019-20 towards SHS programs within Partner's jurisdictional limits including, but not limited to, within the Region. "Current Partner-provided SHS Funds" expressly excludes all other sources of funds Partner may use to fund SHS programs as of FY 2019-20 including, but not limited to, state or federal grants. Apart from such general fund dollars already budgeted and used for SHS purposes as described in **Section 5.5.1**, this Agreement does not require Partner to expend or risk its own funds (other than the Program Funds it receives) or otherwise incur any financial liability in the performance of any of its duties, or in the exercise of its rights or powers hereunder.
- b. "Displace" or "Displacement" means to reduce Partner's overall, county-wide Current Partner-provided SHS Funds. Partner's reduction of funds provided towards a particular SHS program, type of SHS, or a reduction of SHS funds in a particular geographic area including, but not limited to, within the Region, is not a Displacement, provided Partner's overall Current Partner-provided SHS Funds are not reduced. The Parties agree that Partner may reduce current SHS programs currently being provided within the Region, but that reduction is not a "Displacement" and does not violate **Section 5.5.1** of this Agreement or Section 9 of the Measure, provided Partner's overall Current Partner-provided SHS Funds are not reduced.

5.5.2. ANNUAL PROGRAM BUDGET. As part of its Annual Program Report, Partner must submit to Metro for review an Annual Program Budget for the current Fiscal Year. In FY 2021-22, Partner will present the SHS Program Budget in a form reasonably designed to identify Budgeted Program Funds for that Fiscal Year. Starting in FY 2022-2023, Partner must submit Annual Program Budgets using a template jointly created and approved by Metro and the Counties and must include in its Annual Program Budget its "spend-down plan" for that year, as described below, and information on the amount of other funds Partner has allocated to SHS, and changes, if any, to that funding level from the prior Fiscal Year, as described in **Section 5.5.1.1**. If the Annual Program Budget is amended by Partner's governing

body, Partner must submit to Metro the amended Program Budget within 60 days of the governing body's approval. Partner agrees to provide funding for SHS as described in the Program Budget; provided, however, that Partner is only obligated to provide funding for SHS in the amounts actually received from Metro. A failure to submit an Annual Program Budget to Metro by the end of the first quarter and any material deviation from the Annual Program Budget without prior notice and explanation to Metro may be cause for Metro to initiate the dispute resolution process in **Section 10.1**.

5.5.2.1. SPEND-DOWN PLAN. Partner's "spend-down plan" should describe the nature and timing of planned spending of Program Funds it expects to receive in the Fiscal Year based on the FRT's forecast. In addition, the description will document existing and contemplated reserves, any program reserves, funds anticipated to be carried over for SHS programming into the following Fiscal Year(s) with the anticipated timeline for spending of those funds, and such other information as the Parties agree to in writing. Partner will report on, and explain any material deviations from, the plan reflected in its Budgeted Program Funds as part of its Quarterly Progress Report. A "material deviation" from a spend-down plan described under this section, or a CAP, arises where the Program Funds spent in a given Fiscal Year cannot be reconciled against the spend-down plan or CAP in the relevant Annual Program Budget to the degree that no reasonable person would conclude that Partner's spending was guided by or in conformance with the applicable spend-down plan or CAP.

5.5.3. PARTNER STABILIZATION RESERVE. Partner will establish and hold a Stabilization Reserve to protect against financial instability within the SHS program and to insulate continuing program objectives from significant revenue fluctuations. The target minimum reserve level will be equal to 10% of Partner's Budgeted Program Funds in a given Fiscal Year. Stabilization Reserve funds may be used when the Program Funds allocated to Partner fall below the budgeted estimate for that time period and based on Partner's decision, informed by the FRT's assessment under **Section 6.2.5.2**, that release of such funds is needed to prevent significant program reductions. The Stabilization Reserve for each County will be fully funded within the first three years of the Term.

5.5.4. CONTINGENCY. Partner may establish and hold a contingency account in addition to a Stabilization Reserve. The contingency account will provide resources for emergency situations or unplanned SHS program expenditures that, if left unattended, could negatively impact service delivery. The contingency account will not exceed 5% of Budgeted Program Funds in a given Fiscal Year.

6. PERFORMANCE AND FINANCIAL GOVERNANCE.

6.1. RECORDKEEPING, CONTROLS. Each Party must:

6.1.1. maintain Records of payments made and funds received under this Agreement;

- 6.1.2. make an annual accounting of their use of Income Taxes and provide that accounting to their respective CFOs, Metro, and the ROC, and make that accounting available for review by the Partner Auditor and the Metro Auditor, as well as by any public accounting or auditing firms retained by a Party;
 - 6.1.3. exercise the rights and powers vested in it by this Agreement and use the same degree of care and skill as a prudent person would exercise or use under the circumstances; and
 - 6.1.4. ensure that any Income Taxes (including general tax receipts or reserves) held for more than one Fiscal Year are retained in accordance with state finance law and administered according to its investment policy. All proceeds of such investments will be added to Program Funds and otherwise must be spent on SHS programs or Administrative Expenses and Administrative Costs, as appropriate.
- 6.2. FINANCIAL REVIEW TEAM. The FRT is a technical committee charged with assessing Income Tax collections and the Region's overall financial health at regular intervals and on an as needed basis in order to support Metro, the Counties, and the ROC. FRT members may consult with the Metro Economist, any County economist, or other financial professionals as they deem appropriate. The role, membership, and responsibilities of the FRT are set forth below.
- 6.2.1. ROLE. The FRT's role is to provide financial analysis and advice to Metro, the Counties, and the ROC regarding the current and prospective adequacy of Program Funds to fund SHS programs. In addition, the FRT may provide periodic advice and reporting to any County, or other Party representative, as needed, including to County elected officials and elected members of the Metro Council.
 - 6.2.2. MEMBERSHIP. The FRT is composed of four members – the CFOs, or their designees, for the Counties, and the CFO, or their designee, for Metro. FRT members will provide Metro with their contact information.
 - 6.2.3. MEETINGS. The FRT will meet quarterly, or as often as needed as agreed between the CFOs, to review Income Tax collections, revenue projections, Program Funds disbursements, partner spending activity, any requests for disbursements from Stabilization Reserves, and to meet timelines specified between the FRT members. The Metro CFO will provide notice to the members at least five business days in advance of a meeting. Meetings may be held in person or by means of telephonic or electronic communications.
 - 6.2.4. REPORTS. The FRT and its members, in making their recommendations and reports on any task, do not have to reach consensus or vote on a single recommendation and may, instead, make as many recommendations as are needed to fully describe the members' opinions or the range of options being recommended by the members. If multiple FRT written recommendations or reports are made for a task, the document memorializing their deliberations will: (a) include all recommendations and reports submitted by FRT members, with each

recommendation including a full description of the recommended action(s); and (b) indicate which member(s) support each recommendation.

6.2.5. TASKS, REVIEWS. The tasks to be performed by the FRT, the criteria to evaluate, the timing and/or frequency of tasks, and the deliverable(s) for each task, are described below. Notice, reports, or advice described in the tasks below that are required to be in writing must be transmitted via email to the appropriate individuals using the contact information in **Exhibit 4**.

6.2.5.1. TASK 1. Develop a five-year revenue and expenditure forecast and advise the ROC, Counties, and Metro, as needed.

- a. TIMING/FREQUENCY. The forecast prepared under this Task 1 will be completed and made available annually by the first business day in the month of December. The FRT may revise and or enhance the forecast on a more frequent basis as needed.
- b. FRT ACTION. The revenue and expenditure forecast prepared by the FRT under this Task 1 will support the Counties in developing annual budgets or enhancing current year estimates. The FRT will assess tax collection activity, program expenditure activity, cash flows, adequacy of their respective Stabilization Reserves, and assess the overall financial health of the SHS program. Information to be reviewed in preparing annual forecast will include but is not limited to:
 - i. Local and national key economic indicators;
 - ii. Tri-County tax collection activity (current and historical) and collection rates;
 - iii. Historical spending trends by the Counties against their respective budgets;
 - iv. Review adequacy of Stabilization Reserve funds for each County; and
 - v. Review and assess County-held SHS contingency accounts.
- c. FRT DELIVERABLES. The FRT will prepare a written summary report based on the forecast of SHS Revenues and SHS expenditures created and provided by the Metro CFO under **Section 7.2.1.1**. The FRT's report will contain a five-year revenue/expenditure forecast, current SHS Revenue collection activity, economic factors impacting tax collections, spending activity by any County subject to a CAP (as described in **Section 6.3.5**), and adequacy of each County's Stabilization Reserve.

6.2.5.2. TASK 2. The FRT will develop a policy to establish and manage Stabilization Reserve funds. The policy will be completed no later than May 2, 2022. In addition, the FRT will review the adequacy of each County's Stabilization Reserve, review and recommend policies for establishment and usage of

reserves, use of reserves, and monitor timely restoration of required reserve levels.

- a. TIMING/FREQUENCY. At least annually, the FRT will assess adequacy of reserves and review instances of reserve usage.
- b. FRT ACTION. Make recommendations, as appropriate, regarding the usage of moneys from Stabilization Reserve funds. Set plan and timeline for reserve restoration.
- c. FRT DELIVERABLE. For instances when Stabilization Reserve usage is recommended, the FRT will prepare a report detailing the recommended amount to be used, description of the economic conditions that caused revenue shortfalls, planned program usages of reserves, and timeline to restore reserve.

6.3. OBLIGATIONS OF THE PARTIES.

- 6.3.1. DUTY TO RESPOND TO REGIONAL OVERSIGHT COMMITTEE. Each Party agrees to respond to any recommendations of the ROC reasonably related to carrying out the ROC's responsibilities. The Parties may respond by providing an explanation for why it disagrees with the recommendation, or any portion of a recommendation, or by identifying proposed strategies to address the recommendation(s). The Parties will submit written responses to the ROC.
- 6.3.2. DATA SHARING AGREEMENT. The Parties will enter into a data sharing agreement no later than May 31, 2022. The purpose of the data sharing agreement is to provide the Parties, and the oversight groups described in **Section 8**, with access to disaggregated, de-identified data, or as otherwise agreed to between the Parties, that allows for meaningful review of whether the Parties are achieving progress towards measurable goals, and to further aid in certain research, planning, and program evaluation.
- 6.3.3. PERIODIC REVIEW OF AGREEMENT. The Parties agree to convene to review this Agreement periodically. Beginning on July 1, 2023, either Party may request that the Parties and other Counties meet to consider amendments to this Agreement. If a request to consider amendments is made, the Parties agree to convene and, in a timely manner, assign adequate staff resources, establish a schedule for negotiations and participate in the negotiations in good faith.
- 6.3.4. GOOD FAITH PERFORMANCE. The Parties will execute their duties to each other and the ROC and TCPB in good faith.
- 6.3.5. CORRECTIVE ACTION PLAN. If 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. In determining whether a CAP is necessary, Metro may rely upon Partner's last Annual Program

Report, Quarterly Progress Reports, its Annual Program Budget, its Local Implementation Plan, and any other relevant document. The CAP will outline the actions needed by both Parties to achieve desired program outcomes and the timeline for completion. The Metro Chief Operating Officer and a leader identified by Partner's chief executive must approve a CAP for it to become effective. If either Party fails to timely or adequately perform the actions in the CAP, or if the Parties are unable to agree on a CAP, either Party may initiate dispute resolution.

6.4. PARTNER OBLIGATIONS.

6.4.1. CONSISTENCY BETWEEN BUDGETING, FUNDING. Partner agrees to use Budgeted Program Funds for SHS substantially as described in its Annual Program Budget. Partner may reallocate Budgeted Program Funds across SHS budget categories as needed to achieve program goals, provided that the reallocation does not materially and adversely affect performance of Partner's Annual Work Plan. Partner must report on, and justify, any material reallocations of Budgeted Program Funds in its next Quarterly Report.

6.4.2. SERVICES PROVIDERS MONITORING. Partner must monitor the activities of Services Providers as is reasonable to ensure compliance with this Agreement.

6.4.3. FORECASTING ASSISTANCE. Partner's CFO, as part of their work on the FRT, will consult with Metro's CFO and the CFOs for the other Counties on the annual forecasts of Income Tax collections described in **Section 7.2.1.1.**

6.4.4. DATA COLLECTION. Partner must maintain, individually or jointly by implementation of the Counties, a Homeless Management Information System (HMIS) that satisfies relevant federal regulatory requirements and that collects participant level data on programs funded by Program Funds. Metro's access and use of this data is the subject of the data sharing agreement described in **Section 6.3.2.**

6.5. METRO OBLIGATIONS.

6.5.1. SUPPORT REGIONAL COMMITTEES. In order for the Counties to meet their commitments under this Agreement and achieve the objectives of the Measure, Metro will ensure that the ROC and TCPB are convened, staffed, funded, and operating.

6.5.2. REVIEW OF PARTNER SHS SPENDING. Metro will annually review Partner's Annual Program Report for the previous Fiscal Year to evaluate how Program Fund expenditures impacted established SHS program metrics and whether Partner's spending was consistent with its Annual Program Budget.

6.5.3. PARTNER MONITORING. Upon reasonable written notice to Partner, Metro may reasonably monitor up to once per Fiscal Year, or for cause, not more than 25% of the SHS program activities described in a given Fiscal Year's Annual Work Plan, including Partner's associated Records and the Records of its Services Providers for that Fiscal Year. This monitoring will be to review Partner's and its Services

Providers' compliance with the terms of this Agreement. Ahead of any monitoring event under this section, the Parties must develop a written plan describing how Metro will conduct its review. Metro may use third-parties in its monitoring activities. Partner consents to reasonable monitoring by Metro, as set forth in this section, and agrees to reasonably cooperate with reasonable requests, and to require that its Services Providers also cooperate with reasonable requests.

6.5.4. DATA REPORTING PROGRAM. As more specifically described in the data sharing agreement identified in **Section 6.3.2**, Metro will establish a regional SHS program data collection and reporting program that supports tri-county regional collaboration.

7. REPORTING REQUIREMENTS.

7.1. PARTNER REPORTING REQUIREMENTS.

7.1.1. ANNUAL PROGRAM REPORT. No later than October 31 of each year, Partner will provide an Annual Program Report for the previous Fiscal Year to the ROC and Metro Council. The report will describe how Partner spent Program Funds in the previous Fiscal Year and how those expenditures contributed to outcomes as defined by Partner's Local Implementation Plan and, once established, regional outcome metrics. Partner will prepare the Annual Program Report using a template jointly created and approved by Metro and the Counties and will include the following:

7.1.1.1. Partner's Annual Program Budget and spend-down plan for the given Fiscal Year;

7.1.1.2. A certification consistent with **Section 5.5.1** that Partner did not reduce funding commitments for SHS in the Fiscal Year;

7.1.1.3. Reporting on all required outcome and equity metrics for the Region for the Fiscal Year, regional measurable goals, and any applicable performance evaluation metrics;

7.1.1.4. A summary of SHS program investments over the Fiscal Year (if not identified in the Annual Program Budget);

7.1.1.5. An analysis of how SHS program investments have contributed to the values and goals of the SHS program;

7.1.1.6. Any strategies to adjust or augment SHS programming to improve performance and outcomes in future years; and

7.1.1.7. A list of all the Services Providers under contract with Partner that received Program Funds, and the amount of funds received by each contractor.

7.1.2. QUARTERLY PROGRESS REPORT. Beginning at the end of the first Fiscal Year quarter after the Effective Date, and no later than 45 days after the end of each Fiscal Year quarter, Partner will prepare a Quarterly Progress Report and provide

that report to the ROC and Metro. Partner will prepare the Quarterly Report using a template jointly created and approved by Metro and the Counties that will include information on progress toward local and regional metrics, budgeted spending, transfers of Program Funds between Counties, and any material changes in programming or strategy from those set out in the Annual Work Plan. For reports created before the template is available, the information to be included in the reports will be as agreed to by the Parties.

7.2. METRO REPORTING REQUIREMENTS.

7.2.1. ANNUALLY. Each Fiscal Year, Metro must prepare and submit the reports provided for below.

7.2.1.1. FIVE-YEAR FORECAST. 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.

7.2.1.2. PROGRAM FUNDS REPORT. Metro will provide an annual report to the Counties of all Income Taxes not distributed to the Counties, and a breakdown of the use of those funds, including Income Taxes used to pay for collection and Administrative Expenses.

7.2.2. MONTHLY. Monthly each Fiscal Year, Metro must provide to the Counties a report on actual Income Tax collections for the reported month, and other readily available reports. If a requested report is not readily available, Metro will make a reasonable attempt to obtain that report.

8. SHS PROGRAM GROUPS.

8.1. EXECUTIVE COMMITTEE.

8.1.1. ROLE, FUNCTIONS. The Executive Committee addresses ongoing and specific SHS program implementation improvement needs as follows:

8.1.1.1. Regularly convene meetings between representatives from the Counties and Metro with the appropriate subject matter training and SHS background to learn about and respond to matters impacting SHS program implementation as they arise. At their meetings, members may work to understand strong criticisms of the SHS program or its implementation; connect issues brought to the committee to performances, rights, and obligations in the Agreement or Measure; and otherwise discuss and provide feedback regarding SHS program matters to promote ongoing cooperative efforts between all SHS program partners.

- 8.1.1.2. As needed and described in **Section 10.1**, convene as an informal problem solving body prior to the initiation of mediation or other remedies provided for under the Agreement.
- 8.1.1.3. As described in **Section 8.2.4**, convene to assess Metro-proposed changes to the ROC after a review by Metro of the ROC's role and effectiveness.
- 8.1.1.4. As described in **Section 10.2.3.6**, convene to consider whether a County has anticipatorily repudiated the Agreement.
- 8.1.2. **MEMBERSHIP**. Each County and Metro will appoint four individuals to serve as their respective representatives on the Executive Committee. Each party's delegation should be comprised of at least one individual each with program, policy, legal, and finance expertise, as well as familiarity with the terms of the Agreement and with the SHS program, generally. Each Executive Committee member serves until they are replaced by the public body that they represent.
- 8.1.3. **MEETINGS**. Any County or Metro may call for an Executive Committee meeting, and the committee may meet as often as needed to respond to issues arising under the Agreement and meet relevant timelines or requirements in this Agreement. Not all Executive Committee members need to attend each meeting if the Counties and Metro agree on limiting attendance to certain members based on the agenda for a meeting (e.g., to members with particular expertise, such as SHS program implementation). Metro will send written notice to members, including an agenda, at least five business days before a meeting. Meetings may be held in person or by means of telephonic or electronic communications.
- 8.1.4. **ACTIONS**. Executive Committee actions are by delegation, rather than based on individual members. Unless otherwise provided in the Agreement, the Executive Committee and each Party's delegation in making their recommendations on any matter do not have to reach consensus or vote on a single recommendation but may instead make as many recommendations as are needed to fully describe the opinions or the range of options being recommended by the committee and its delegations. If multiple written recommendations are made for a matter, the document memorializing their deliberations will: (a) include all recommendations submitted, with each recommendation including a full description of the recommended action(s); and (b) indicate which delegation(s) support each recommendation. If the Agreement calls for the Executive Committee to assess a specific matter and asks for the committee's delegations to "find" or vote regarding an outcome and based on a majority view, a "majority" of the Executive Committee delegations means at least three of the four delegations support the outcome.
- 8.2. **REGIONAL OVERSIGHT COMMITTEE**.
 - 8.2.1. **PURPOSE AND AUTHORITY**. The ROC is charged with the SHS program oversight functions set forth in the Measure at Sections 5(2) and 14(2).

- 8.2.2. MEMBERSHIP. Metro will work cooperatively with the Counties to select ROC members.
- 8.2.3. MEETINGS. The ROC will convene in a manner that is consistent with the ROC Charter and as frequently as needed to meet its obligations under the Measure and Agreement.
- 8.2.4. PERIODIC REVIEW. Metro may conduct a review of the ROC's role and effectiveness as appropriate. If after its review Metro concludes, in good faith, that revisions to the ROC, including to the ROC Charter, are necessary then it will provide the Executive Committee with written findings detailing the issues it believes warrant changes to the ROC, and a description of the change(s) it proposes. The Executive Committee will review Metro's proposal(s) and determine whether the proposed change(s) alter the purpose or authority of the ROC, as set forth in the Measure at Section 5(2). If a majority of the Executive Committee's delegations find that the proposed changes do not alter the purpose or authority of the ROC, then Metro may implement its proposed changes 30 days after the Executive Committee's finding. If a majority of the committee's delegations find that Metro's proposed changes alter the purpose or authority of the ROC, then the following process applies:
- 8.2.4.1. Metro and the Counties may execute an amendment to the Agreement to implement Metro's proposed changes to the purpose, or authority of the ROC;
or
- 8.2.4.2. Metro may implement its proposed change(s) to the purpose, or authority of the ROC with the majority written approval of the elected officials of the Counties, as follows:
- a. Metro will incorporate its proposed change(s) to the ROC into a revised ROC Charter and then circulate a redline of its proposed revisions to the charter to the Counties for their review and approval.
 - b. Any County that is amenable to the change(s) incorporated into the revised ROC Charter circulated by Metro may agree to the change(s) by sending a letter, signed with the approval of the County's board of commissioners, that describes the approved change(s) to the ROC Charter and confirms the County's approval of such change(s).
 - c. Metro may implement its proposed change(s) to the purpose, or authority of the ROC, as set forth in the revised ROC Charter, with the written approval of two of the three Counties as set forth above.

A Party that determines that a change to the ROC, implemented by Metro without approval through the above process, is outside the purpose or authority of the ROC, or otherwise violates the Agreement, may seek dispute resolution of that matter. Disputes arising under this **Section 8.2.4** may skip the review provided for in **Section 10.1.3**.

8.3. TRI-COUNTY PLANNING BODY.

8.3.1. PURPOSE. Metro will convene the TCPB to strengthen coordination among the Counties and Metro in addressing homelessness in the Region. The TCPB will identify Regional goals, strategies, and outcome metrics that support Regional SHS coordination and alignment. The TCPB will approve and incorporate strategies developed and investments made by each County that reasonably accomplish the Regional goals, strategies, and outcome metrics identified by the TCPB for the Tri-County Plan, and that the Tri-County Plan’s purpose will be to support the successful implementation of each County’s locally developed Plan.

8.3.2. TCPB CHARTER. Within 120 days of the Effective Date, Metro and the Counties will finalize the TCPB Charter which will describe a proposed structure, roles, and procedures for the TCPB, to be presented to the Parties’ governing bodies for approval.

8.3.3. REGIONAL STRATEGY IMPLEMENTATION FUND. Each County must contribute not less than 5% of its share of Program Funds each Fiscal Year to a Regional Strategy Implementation Fund to achieve regional investment strategies. Partner may use the 5% for expenses that are consistent with the “measurable goals” described in the Metro SHS Work Plan at Section 5.2 until such time as the TCPB has developed new or different regional goals and provided the Parties with the Tri-County Plan detailing those goals. Each Fiscal Year, Partner must describe in its Annual Program Budget its investments in regional strategies during the reporting year. Partner may reimburse itself from its Regional Strategy Implementation Fund for its investments in regional strategies. Partner may collaborate with and pay other Counties from its Regional Strategy Implementation Fund to implement regional investment strategies in the Tri-County Plan.

8.4. METRO.

8.4.1. FUNCTIONS. Metro provides oversight and accountability for how Program Funds are spent by Partner under the SHS program through:

8.4.1.1. Adoption of Metro’s SHS Work Plan and any amendments thereto;

8.4.1.2. Approval of Local Implementation Plans and any Material Plan Amendments, as set forth in the Agreement and consistent with the mandate of providing Partner sufficient flexibility to best serve the needs of its residents, communities, and those receiving SHS;

8.4.1.3. Appointing ROC members as set forth in **Section 8.2.2**; and

8.4.1.4. Monitoring of program outcomes and metrics, with guidance from the ROC and, when formed, the TCPB.

9. RISK-SHARING.

9.1. NOTICE. If any third-party makes any claim or brings any action, suit or proceeding alleging a tort as now or hereafter defined in ORS 30.260 (a “Third-Party Claim”) against a Party that one or more of the Parties may have liability, the Party against whom the Third-Party Claim was directed shall promptly notify the other Party in writing of the Third-Party Claim and provide the other Party with a copy of the claim, process and all legal pleadings with respect to the Third-Party Claim that have been received.

9.2. INDEMNIFICATION BY THE PARTIES.

9.2.1. PARTNER. Subject to the limits of the Oregon Tort Claims Act (OTCA) and the Oregon Constitution, Partner shall indemnify and hold harmless Metro and its officers, agents, and employees, or any of them from any and all liability, loss, costs, expenses, and damages of any nature whatsoever, by any reason of or arising out of any act or omission of Partner, its officers, agents, and employees, or any of them relating to or arising from Partner’s performances under the Agreement. In the event that any suit based upon such a Third-Party Claim is brought against Metro, Partner shall defend the same at its sole cost and expense; provided that Metro reserves the right to participate in said suit if any principle of governmental or public law is involved; and if final judgment be rendered against Metro, and its officers, agents, and employees, or any of them, or jointly against Metro and Partner and their respective officers, agents, and employees, or any of them, Partner shall satisfy the same.

9.2.2. METRO. Subject to the limits of the OTCA and the Oregon Constitution, Metro shall indemnify and hold harmless Partner and its officers, agents, and employees, or any of them from any and all liability, loss, costs, expenses, and damages of any nature whatsoever, by any reason of or arising out of any act or omission of Metro, its officers, agents, and employees, or any of them relating to or arising from Metro’s performances under the Agreement. In the event that any suit based upon such a Third-Party Claim is brought against Partner, Metro shall defend the same at its sole cost and expense; provided that Partner reserves the right to participate in said suit if any principle of governmental or public law is involved; and if final judgment be rendered against Partner, and its officers, agents, and employees, or any of them, or jointly against Metro and Partner and their respective officers, agents, and employees, or any of them, Metro shall satisfy the same.

9.3. INDEMNIFICATION BY SERVICES PROVIDERS. After the Effective Date, Partner will take reasonable steps to cause its Services Providers that are not units of local government as defined in ORS 190.003, if any, to indemnify, defend, save and hold harmless Metro and its officers, employees and agents from and against any and all claims and losses arising from a tort (as now or hereafter defined in ORS 30.260) caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of Partner’s Services Provider or any of the officers, agents, employees or subcontractors of the Services Provider.

10. DISPUTES, REMEDIES.

10.1. DISPUTE RESOLUTION. In the event a dispute arises between the Parties regarding this Agreement, including where a Party determines that the other is not complying with the Agreement, the Parties will use the following process to attempt to resolve the dispute.

10.1.1. A Party will provide the other with written notice of the dispute. The notice will describe the dispute, or if the notice arises from non-compliance with the Agreement, describe evidence of non-compliance and the steps the Party believes are needed to restore compliance with the Agreement. Unless otherwise provided for in the Agreement, the Party receiving notice will have 30 days from the date it receives the notice to restore compliance with the Agreement. If the non-compliance issue is of such a nature that it cannot reasonably be cured within 30 days, the Party on notice of its non-compliance will have such additional time as required to restore its compliance with the applicable terms of the Agreement, as long as it is acting in a reasonable manner and in good faith.

10.1.2. If the non-compliant Party does not reasonably correct the non-compliance concern or if the dispute is not otherwise resolved between the Parties within the time allowed, the Parties will attempt to settle the issue through good faith negotiation. This may be done at any management level, including at a level higher than persons directly responsible for administration of the Agreement.

10.1.3. If the Parties are unable to resolve the issue through such negotiation, or such negotiations have not resolved the dispute or non-compliance concern within 30 days from the date a Party first issues written notice as provided in **Section 10.1.1** and the Parties have not agreed to an extension of time to negotiate, the Parties will submit the issue to the Executive Committee as provided in **Section 8.1**. The Executive Committee will attempt to resolve the dispute or non-compliance concern on terms acceptable to both Parties.

10.1.4. If the Executive Committee is unable to resolve the dispute or non-compliance concern within 30 days of their first meeting regarding the issue, and the Parties have not agreed to an extension of time for the Executive Committee to resolve the dispute, the Parties will then attempt in good faith to resolve the issue by facilitated mediation. The Parties agree to attend at least four hours of mediation before resorting to arbitration, litigation, or some other dispute resolution procedure. The Parties agree to schedule the mediation within 60 days of written notice from the Executive Committee that it is unable to resolve the dispute or non-compliance concern.

10.1.5. The Parties will attempt to use the services of a mutually agreed upon mediator, with a preference for a mediator with experience in mediating disputes between local governments. If the Parties cannot mutually agree on a mediator within 14

business days of having submitted a possible mediator candidate, or the mediation is unsuccessful, either party may proceed to arbitration or litigation.

10.1.6. Each Party is responsible for its own dispute-related costs. The Parties will each pay for half of any mutually retained mediator or arbitrator's services and costs.

10.1.7. Nothing prevents a Party from resorting to a court of competent jurisdiction in those instances where injunctive relief may be appropriate; or, if the Parties agree, seek arbitration to resolve the dispute or non-compliance concern. Any dispute submitted for arbitration will be settled in accordance with the commercial arbitration rules of the Arbitration Services of Portland, Inc., then in effect, and judgment on the award may be entered in any court having jurisdiction.

10.2. REMEDIES.

10.2.1. BREACH BY PARTNER. Subject to the dispute resolution process set forth in **Section 10.1** and the limits of the OTCA and the Oregon Constitution, if Metro reasonably believes that Partner (a) has failed to comply timely with any material obligation under this Agreement or its Local Implementation Plan, or (b) is not spending its Program Funds according to the terms of this Agreement, then Metro may exercise any remedy available to it under this Agreement or applicable law, including but not limited to injunctive relief and termination of the Agreement.

10.2.2. BREACH BY METRO. Subject to the dispute resolution process set forth in **Section 10.1** and the limits of the OTCA and the Oregon Constitution, if Partner believes that Metro (a) has failed to comply timely with any material obligations under this Agreement, the Metro SHS Work Plan, or applicable law, or (b) is not disbursing funds timely or in the amount required under this Agreement, then Partner may exercise any remedy available to it under this Agreement or applicable law, including but not limited to injunctive relief and termination of the Agreement.

10.2.3. WITHHOLDING PROGRAM FUNDS. If Metro in good faith determines that Partner has Misused, as defined below, Program Funds, and after engaging in any relevant responsive process set forth in the Agreement, then Metro may withhold from future Program Fund allocations to Partner an amount equal to the Misuse, as provided below, until Partner corrects the Misuse as set forth below.

10.2.3.1. "Misuse" means Partner: (a) used Program Funds for non-SHS purposes; (b) except as provided for in **Section 4.1**, spending Program Funds outside the Region; or (c) failed to comply with a CAP.

10.2.3.2. NOTICE AND DISPUTE RESOLUTION. Prior to withholding future Program Funds, Metro will provide Partner written notice of the alleged Misuse and immediately begin the dispute resolution process set forth in **Section 10**. If the Parties have not resolved the dispute within 90 days of Partner receiving written notice of the Misuse, Metro may withhold future Program Funds in an amount equal to the alleged Misuse. Notwithstanding the 90-day period provided herein, Metro will not withhold future Program Funds if Metro reasonably determines

the Parties are attempting, in good faith, to resolve the dispute through the dispute resolution process set forth in **Section 10**.

- 10.2.3.3. TERMINATION OF WITHHOLDING. Metro's right to withhold future Program Funds terminates upon the occurrence of one of the following:
- a. APPROPRIATE SPENDING. Partner either, as appropriate: (i) provides funding towards an eligible Partner SHS program, through non-Program Funds dollars, in an amount equal to Partner's Misuse; or (ii) spends Program Funds in a manner consistent with a CAP.
 - b. COURT ORDER. A tribunal (i.e., a court of competent jurisdiction or an arbitrator) determines that Partner's use of Program Funds was permissible under this Agreement.
- 10.2.3.4. EXAMPLES OF MISUSE AND NON-MISUSE. The following are examples of expenditures that constitute Misuse under this subsection: using Program Funds to repair roads, hire corrections or parole officers, or to pay for public improvements unrelated to the provision of SHS. The following examples do not constitute Misuse: spending Program Funds on eligible SHS programs but differently than as described in the Plan or Annual Work Plan, provided the spending does not materially deviate from the approved Local Implementation Plan or Material Plan Amendment; spending less than provided for in an applicable Annual Program Budget because of insufficient Program Funds received from Metro; reserving Program Funds over multiple Fiscal Years to pay contractual, project-based rent assistance requirements; spending Program Funds on SHS programming but through other departments or agencies, such as on behavioral health services for people experiencing homelessness, and spending on juvenile homelessness; spending Program Funds on capacity building; and spending Program Funds on debt service for loans benefitting a SHS program.
- 10.2.3.5. CORRECTIVE ACTION PLAN-BASED WITHHOLDING. Upon completion of the dispute resolution process set forth in **Section 10**, if Partner fails to comply with a CAP, then Metro may temporarily withhold an amount equal to the under-expenditure until Partner corrects the under-expenditure by spending Program Funds in accordance with its CAP.
- 10.2.3.6. PROGRAM FUNDS RE-ALLOCATION FOR BREACH. Metro may re-allocate Program Funds withheld from one County (the "Repudiating County") and disburse those Program Funds to one or more other Counties to be used within the boundaries of the Repudiating County if a majority of the Counties' delegations to the Executive Committee find that the Repudiating County has anticipatorily repudiated the Agreement. If a majority of the Counties' delegations find that an anticipatory repudiation has occurred, then the following process applies:

- a. Metro and the County or Counties receiving re-allocated Program Funds may execute an amendment to the Agreement to describe the relevant terms for and to implement the re-allocation; or
- b. Metro and the County or Counties receiving re-allocated Program Funds may implement the re-allocation with the signed, written approval of their chief elected officials on a document describing the relevant terms governing the re-allocation and use of Program Funds.

The Repudiating County may seek dispute resolution of that matter in accordance with **Section 10.1** or, at the Repudiating County's discretion, may immediately file suit with a court of competent jurisdiction (or commence arbitration, if agreed to by all parties) challenging the determination that the Repudiating County anticipatorily repudiated the Agreement.

11. GENERAL PROVISIONS.

- 11.1. COOPERATION OF GOVERNMENT UNITS. This Agreement is an intergovernmental agreement subject to Chapter 190 of the Oregon Revised Statutes. The Agreement is an authorization by a public body under ORS 190.010 for a Party to perform one or more inherent governmental responsibilities for another Party.
- 11.2. ACCESS TO, MAINTENANCE OF RECORDS. Each Party is allowed access to the books, documents and other Records of the other Party that are related to this Agreement for the purpose of examination, copying and audit, unless otherwise limited by law. The Parties will retain, maintain, and keep accessible all Records for a minimum of seven years following Agreement termination, unless a longer period of time is required under law. The Parties will maintain financial Records in accordance with generally accepted accounting principles.
- 11.3. MEDIA RELEASES, PUBLIC ACKNOWLEDGMENT. The Parties acknowledge the value in coordinating public communications about the SHS program and will make reasonable efforts to provide notice to each other prior to issuing press releases, holding press conferences, or engaging in other pre-planned public communications about the program. The Parties will use reasonable efforts to notify each other prior to releasing communications between the Parties to the public. Similarly, each Party will make reasonable efforts to publicly recognize the other and the SHS program in any publications, media presentations, or other presentations relating to or describing SHS programs and services supported by Income Taxes, including and as applicable by providing a speaking opportunity for the elected official(s) for the district in which a Party-organized event occurs.
- 11.4. NOTICE. A notice or communication under this Agreement by a Party to another Party is sufficiently delivered if sent with all applicable postage or delivery charges prepaid by: (a) personal delivery; (b) sending a confirmed email copy (either by automatic electronic confirmation or by affidavit of the sender) directed to the email address of the Party set forth below; (c) registered or certified U.S. mail, return receipt

requested; or (d) delivery service or “overnight delivery” service that provides a written confirmation of delivery, each addressed to a Party as set forth in **Exhibit 4**.

Each Party may specify a different address for subsequent notice purposes. Notice is deemed effective on the earlier of actual delivery or refusal of a Party to accept delivery, provided that notices delivered by email are not deemed effective unless the individual to whom an email is sent confirms receipt of the email.

- 11.5. SUCCESSORS; NO ASSIGNMENT, THIRD-PARTY BENEFICIARIES. This Agreement binds each Party, its successors, assigns and legal representatives. No Party may voluntarily assign or transfer its obligations to any third-party. Nothing in this Agreement provides any benefit or right to any non-party unless such third-person is individually identified by name in this Agreement and expressly described as an “intended third-party beneficiary” of this Agreement.
- 11.6. ADHERENCE TO LAW. The Parties will adhere to all applicable federal and state laws in all activities under this Agreement.
- 11.7. WAIVERS. No waiver made by a Party with respect to performance, or the manner or time of performance, of any obligation of another Party or any condition under this Agreement will be considered a waiver of any other rights of the Party making the waiver or a waiver by any other Party. No waiver by a Party of any provision of this Agreement will be of any force or effect unless in writing and no waiver may be construed to be a continuing waiver.
- 11.8. TIME OF THE ESSENCE. Time is of the essence of this Agreement.
- 11.9. CHOICE OF LAW AND FORUM. This Agreement will be construed in accordance with the laws of the state of Oregon and any action brought under this Agreement will be brought in Multnomah County, Oregon, if in state court, and in the United States District Court for the District of Oregon in Portland, if brought in federal court.
- 11.10. MODIFICATION OR AMENDMENT. This Agreement may only be modified or amended by a writing signed by each of the Parties. No modification or amendment to any provision of this Agreement may be implied from any course of performance, any acquiescence by any Party, any failure of any Party to object to another Party’s performance or failure to perform, or any failure or delay by any Party to enforce its rights.
- 11.11. HEADINGS. Any titles of the sections of this Agreement are inserted for convenience of reference only and will be disregarded in construing or interpreting its provisions.
- 11.12. COUNTERPARTS; ELECTRONIC TRANSACTION. This Agreement may be executed in counterparts, each treated as an original, and the counterparts will constitute one document. The Parties agree that they may conduct this transaction, including any amendments or extension, by electronic means including the use of electronic signatures and facsimiles.

- 11.13. SEVERABILITY. If any term or provision of this Agreement is held invalid or unenforceable by any court of competent jurisdiction, that holding does not invalidate or render unenforceable any other provision of this Agreement.
- 11.14. CONSTRUCTION AND INTERPRETATION. To the extent consistent with the context, words in the singular include the plural, words in the masculine gender include the feminine gender and the neuter, and vice versa. All provisions of this Agreement have been negotiated at arm's length, and this Agreement may not be construed for or against any Party by reason of the authorship or alleged authorship of any provision of this Agreement.
- 11.15. IMPLEMENTATION. The Parties agree to take all actions and execute all documents necessary to effect the terms of this Agreement.
- 11.16. NO ATTORNEY FEES. Each Party is responsible for its own attorneys' fees and expenses to enforce any term of this Agreement in the event any arbitration, action or proceeding (including any bankruptcy proceeding) is instituted.
- 11.17. RELATIONSHIP OF PARTIES. Nothing in this Agreement nor any acts of the Parties under this Agreement may be deemed or construed by the Parties, or by any third person, to create the relationship of principal and agent, or of partnership, or of joint venture or any association between any County and Metro.
- 11.18. FORCE MAJEURE. Neither Party shall be in default of the Agreement by reason of any failure or delay in the performance of its obligations where such failure or delay is caused by circumstances or causes beyond a Party's reasonable control including, but not limited to, civil disturbances, riot, rebellion, invasion, epidemic, hostilities, war, terrorist attack, embargo, natural disaster, acts of God, flood, fire, sabotage, fluctuations or non-availability of electrical power, heat, light, air conditioning or equipment, loss and destruction of property.

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SUPPORTIVE HOUSING SERVICES INTERGOVERNMENTAL AGREEMENT
Signatures

Metro Regional Government

Approved as to form

Marissa Madrigal, Chief Operating Officer

Date: _____

Carrie MacLaren, Metro Attorney

Date: _____

Clackamas County

Approved as to form

Tootie Smith, Chair

Date: _____

Stephen Madkour, County Attorney

Date: _____

EXHIBIT 1
Ballot Measure 26-210

The People of Metro ordain as follows:

SUPPORTIVE HOUSING SERVICES OVERVIEW

SECTION 1. Title

The provisions contained herein are to administer the Metro Supportive Housing Services Revenue, referred to as the “Supportive Housing Services Revenue.”

SECTION 2. Finding of Metropolitan Concern

Homeless and housing services is a matter of metropolitan concern over which Metro may exercise jurisdiction.

SECTION 3. Purpose

The Supportive Housing Services Revenue will fund services for people experiencing homelessness and housing instability.

PROGRAM IMPLEMENTATION

SECTION 4. Services and Priorities

Supportive Housing Services Revenue will fund Supportive Housing Services, including: street outreach services; transition and placement services; in-reach, basic survival support, and mental health services; interventions and addiction services (crisis and recovery); physical health services; interventions for people with physical impairments and disabilities; short and long-term rent assistance; eviction prevention; financial literacy, employment, job training and retention education; peer support services; workplace supports; benefits, navigation and attainment (veteran benefits, SSI, SSDI, other benefits); landlord tenant education and legal services; fair housing advocacy; shelter services; bridge/transitional housing placement; discharge interventions; permanent supportive housing services; affordable housing and rental assistance and other supportive services. Supportive Housing Services Revenue and Supportive Housing Services will first address the unmet needs of people who are experiencing or at risk of experiencing long-term or frequent episodes of homelessness. Supportive Housing Services Revenue and Supportive Housing Services will be prioritized in a manner that provides equitable access to people of color and other historically marginalized communities.

SECTION 5. Oversight Committee

1. **Committee Established.** A 20-member regional oversight committee (hereafter, “Supportive Housing Services Regional Oversight Committee” or “Regional Oversight Committee”) will oversee the Supportive Housing Services Program.
2. **Purpose and Authority.** The purpose and authority of the Supportive Housing Services Regional Oversight Committee is to:
 - a. Evaluate local implementation plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
 - b. Accept and review annual reports for consistency with approved local implementation plans;
 - c. Monitor financial aspects of program administration, including review of program expenditures; and
 - d. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah, and Washington County Boards of Commissioners assessing performance, challenges, and outcomes.
3. **Membership.** The Supportive Housing Services Community Oversight Committee is composed of 20 members, as follows:
 - a. Five members from Clackamas County.
 - b. Five members from Multnomah County.
 - c. Five members from Washington County.
 - d. One representative from each of the Clackamas, Washington, and Multnomah County Board of Commissioners and the Portland City Council to serve as ex officio members.
 - e. One member of the Metro Council to serve as a non-voting delegate.
4. **Membership Representation.** The membership must be composed of persons who represent the following experiences, organizations and qualities:
 - a. Has experience overseeing, providing, or delivering Supportive Housing Services;
 - b. Has lived experience of homelessness or severe housing instability;
 - c. Has experience in the development and implementation of supportive housing and other services;
 - d. Has experience in the delivery of culturally-specific services;
 - e. Represents the private-for-profit sector;
 - f. Represents the philanthropic sector;
 - g. Represents communities of color, Indigenous communities, people with low incomes, immigrants and refugees, the LGBTQ+ community, people with disabilities, and other underserved and/or marginalized communities; and

- h. Represents a continuum of care organization.

A person may represent more than one of the subsections above. The membership must have broad representation and geographical diversity.

- 5. Terms. Nine of the initial Committee members will serve a one year term, and the Council may reappoint those nine members for up to two additional two-year terms.
- 6. Oversight Committee Review. Metro may conduct a review of the regional oversight committee's role and effectiveness as appropriate.

SECTION 6. Local Implementation Plans

- 1. Local implementation plans are intended to document the proposed use of funds and how these uses align with the purposes of the Supportive Housing Services Measure. A plan must be submitted to the Oversight Committee for review and approval before the Metro Council approves it.
- 2. Local implementation plans must be developed using locally convened and comprehensive engagement processes that prioritize the voices of people with lived experience and from communities of color.
- 3. The locally convened body that develops the local implementation plan must include a broad array of stakeholders to develop the plan. Each county may convene a new committee or use a standing committee if the standing committee can demonstrate a track record of achieving equitable outcomes in service provisions to regional oversight committee.
- 4. Members of the convened body that develops the local implementation plan must include:
 - a. People with lived experience of homelessness and/or extreme poverty;
 - b. People from communities of color and other marginalized communities;
 - c. Culturally responsive and culturally specific service providers;
 - d. Elected officials, or their representatives, from the county and cities participating in the regional affordable housing bond;
 - e. Representatives from the business, faith, and philanthropic sectors;
 - f. Representatives of the county/city agencies responsible for implementing homelessness and housing services, and that routinely engage with the unsheltered population;
 - g. Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use disorder from culturally responsive and culturally specific service providers; and
 - h. Representation ensuring geographical diversity.

5. Local implementation plans must include the following:
 - a. A strategy for equitable geographic distribution of services within the respective jurisdictional boundary and the Metro district boundary.
 - b. A description of how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion have been incorporated. This should include a thorough racial equity analysis and strategy that includes: (1) an analysis of the racial disparities among people experiencing homelessness and the priority service population; (2) disparities in access and outcomes in current services for people experiencing homelessness and the priority service population; (3) clearly defined service strategies and resource allocations intended to remedy existing disparities and ensure equitable access to funds; and (4) an articulation of how perspectives of communities of color and culturally specific groups were considered and incorporated.
 - c. A review of current system investments or capacity serving priority populations, an analysis of the nature and extent of gaps in services to meet the needs of the priority population, broken down by service type, household types, and demographic groups.
 - d. A description of the planned investments that includes: (1) the types of services, and how they remedy the service gap analysis; (2) the scale of the investments proposed; (3) the outcomes anticipated; and (4) the service delivery models that will be used in each area of service.
 - e. A plan for coordinating access to services with partnering jurisdictions and service providers across the region.
 - f. A plan for tracking and reporting outcomes annually and as defined through regional coordination.
 - g. A plan to evaluate funded services and programs.
 - h. A description of how funds will be allocated to public and non-profit service providers, including transparent procurement processes, and a description of the workforce equity procurement standards.
 - i. A commitment that funding will be allocated as follows: (a) 75 percent for people who have extremely low incomes and one or more disabling conditions, who are experiencing long-term or frequent episodes of literal homelessness or are at imminent risk of experiencing homelessness; and (b) 25 percent for people who are experiencing homelessness or face/have substantial risk of homelessness.
 - j. A description of how the plan will remove barriers to full participation for organizations and communities by providing stipends, scheduling events at accessible times and locations, and other supportive engagement tactics.
 - k. A description of how the plan will prioritize funding to providers who demonstrate a commitment and delivery to under-served and over-represented populations, with culturally specific and/or linguistically specific services, as well as those programs that have the lowest barriers to entry and actively reach out to communities often screened out of other programs.

6. Each county must provide a report annually on its progress under the local implementation plan to the regional services oversight committee that will discuss progress towards outcomes in each of the service areas identified in the local implementation plan and a separate analysis of progress toward the implementation of the county's racial equity strategy. Reports will also include municipal investments from cities within Metro who have either increased or decreased contributions to homeless services for the priority population. Existing reports may be used.
7. Metro recognizes that each county may approach program implementation differently depending on the unique needs of its residents and communities. Therefore, it is the policy of the Metro Council that there be sufficient flexibility in implementation to best serve the needs of residents, communities, and those receiving Supportive Housing Services from program funding.

SECTION 7. Allocation of Revenue

1. After Metro has first retained funds necessary to pay for collection of the taxes, Metro may retain up to five percent of the remaining collected funds for administration and oversight as more fully described in Section 14(1).
2. After the funds have been allocated for collection, administration and oversight as set forth in subsection (1), Metro will then allocate the remaining Supportive Housing Services Revenue within each county using the following percentages: 21 1/3 percent to Clackamas County, 45 1/3 percent to Multnomah County and 33 1/3 percent to Washington County.
3. The percentages set forth in subsection (2) apply to revenue for the first two tax years. Thereafter, the percentages may be adjusted to reflect the portion of Supportive Housing Services Revenue actually collected in each county.

SECTION 8. Equity and Community Engagement

1. Metro has adopted a Strategic Plan to Advance Racial Equity, Diversity, and Inclusion which includes specific goals and objectives to ensure that all people who live, work and recreate in the greater Portland region have the opportunity to share in and help define a thriving, livable and prosperous region. A key objective throughout the strategy is a commitment to advance equity related to stable and affordable housing.
2. In implementing the Supporting Housing Services Measure, Metro will rely on the goals and objectives within the Strategic Plan to:
 - Convene regional partners to advance racial equity outcomes in supportive housing services.

- Meaningfully engage with communities of color, Indigenous communities, people with low incomes and other historically marginalized communities in establishing outcomes and implementing the Supportive Housing Services Program.
 - Produce and provide research and information to support regional jurisdictions in advancing equity efforts.
 - Increase accountability by ensuring involvement of communities of color in establishing goals, outcomes, and implementation and evaluation efforts.
 - Increase participation of communities of color in decision-making.
 - Use equity criteria in resource allocation for the Supportive Housing Services Program.
3. Metro will actively work to remove barriers for organizations and communities to ensure full participation by providing stipends, scheduling events at accessible times and locations, and other supportive engagement tactics.

SECTION 9. Prohibition on Displacement of Funds Currently Provided

1. The purpose of the Supportive Housing Services tax is to provide revenue for Supportive Housing Services in addition to revenues provided for those services by the local governments within Metro.
2. In the event that any local government within Metro reduces the funds provided for Supportive Housing Services by that local government, Supportive Housing Services Revenue may not be provided to that local government or be used to provide Supportive Housing Services within the boundaries of that local government. This section is intended to prevent any local government from using Supportive Housing Services Revenue to replace funds currently provided by that local government.
3. A local government may seek a temporary waiver from this section for good cause, including but not limited to a broad economic downturn.

TAX COLLECTION REQUIREMENTS

SECTION 10. Voter Approval Ordinance No. 20-1442; Rates; Exemptions

Metro Council Ordinance No. 20-1442 is approved as follows.

1. Personal Income Tax; Rate. Beginning tax year 2021, a tax of one percent is imposed on the entire taxable income over \$200,000 if filing jointly and \$125,000 if filing singly on every resident of the district subject to tax under ORS chapter 316 and upon the taxable income over \$200,000 if filing jointly and \$125,000 if filing singly of every nonresident that is derived from sources within the district which income is subject to tax under ORS chapter 316.

2. Business Profits Tax; Rate. Beginning tax year 2021, a tax of one percent is imposed on the net income of each person doing business within Metro.
3. Exception for Small Businesses. Persons whose gross receipts from all business income, both within and without Metro, amount to less than or equal to \$5 million are exempt from payment of the business profits tax.
4. Exemptions Required by Law. Persons whom Metro is prohibited from taxing under the Constitution or laws of the United States or the Constitution or laws of the State of Oregon, or the Metro Charter are exempt from payment of the taxes set forth in this section.

SECTION 11. Tax Must be Re-Authorized or Discontinued After Ten Years

1. Metro may assess the taxes imposed by section 10 through the tax year ending December 31, 2030.
2. After December 31, 2030, the tax will expire unless reauthorized by the voters on or before that date. After the tax expires, Metro or the entity authorized to collect the tax may continue to take all reasonable and necessary actions to ensure that taxes still owing are paid in full.

SECTION 12. Collection of Funds

1. It is Metro's intent to enter into an intergovernmental agreement with an Oregon taxing agency to collect Supportive Housing Services Revenues.
2. If Metro is unable to enter into an intergovernmental agreement for the collection of Supportive Housing Services Revenues after good faith efforts to do so, Metro may collect the funds.

SECTION 13. Use of Revenues

Unless expressly stated otherwise in this measure, Supportive Housing Services Revenues may only be used for the purposes set forth in Sections 3, 4, 12, and 14. Metro may establish a separate fund or funds for the purpose of receiving and distributing Supportive Housing Services Revenues.

SECTION 14. Administrative Cost Recovery

1. After Metro's tax collection costs are paid, Metro may retain up to five percent of the remaining funds to pay for the costs to disburse the funds and administer and oversee the program. This includes convening and supporting the regional oversight committee;

establishing a regional homelessness data collection and reporting program; and supporting tri-county regional collaboration.

2. At least annually the Regional Oversight Committee will consider whether Metro's collection and administrative costs and each county's administrative costs could or should be reduced or increased. The Regional Oversight Committee will recommend to the Metro Council at least once a year as to how Metro can best limit its collection and administrative costs.
3. In establishing a new Supportive Housing Services Revenue fund, it is the policy of the Metro Council to ensure public transparency and accountability regarding the funding, creation and implementation of this program. It is further the policy of the Metro Council to maintain low administrative costs to ensure that the maximum amount possible of the tax revenue is used to achieve the purposes of Supportive Housing Services.

SECTION 15. Use of Funds in Metro Jurisdictional Boundary Only

Although some portion of each of the three recipient counties (Multnomah, Washington and Clackamas) are outside of the Metro jurisdictional boundary, Supportive Housing Services Revenues collected may be spent only for Supportive Housing Services provided within the Metro jurisdictional boundary.

SECTION 16. Accountability of Funds; Audits

1. Each county or local government receiving funds must make an annual report to the Metro Council and the oversight committee on how funds from the taxes have been spent and how those expenditures have affected established homelessness metrics.
2. Every year a public accounting firm must conduct a financial audit of the revenue generated by the taxes and the distribution of that revenue. Metro will make public the audit and any report to the Metro Council regarding the results of the audit. Metro may use the revenue generated by the taxes to pay for the costs of the audit required under this subsection.
3. The revenue and expenditures from the taxes are subject to performance audits conducted by the Office of the Metro Auditor.

SECTION 17. Ownership of Taxpayer Information

Metro is the sole owner of all taxpayer information under the authority of this measure. The Chief Financial Officer has the right to access all taxpayer information for purposes of administration.

SECTION 18. Confidentiality

1. Except as provided in this measure or otherwise required by law, it is unlawful for the Chief Financial Officer, or any elected official, employee, or agent of Metro, or for any person who has acquired information pursuant to this measure to divulge, release, or make known in any manner any financial information or social security numbers submitted or disclosed to Metro under the provisions of this measure and any applicable administrative rules.
2. Nothing in this section prohibits the disclosure of general statistics in a form that would prevent the identification of financial information or social security numbers regarding an individual taxpayer.

SECTION 19. Examination of Books, Records or Persons

The Chief Operating Officer or its designee may examine any books, papers, records, or memoranda, including state and federal income tax returns, to ascertain the correctness of any tax return or to make an estimate of any tax. The Chief Operating Officer or its designee has the authority, after notice, to require verification of taxpayer information in order to carry out the provisions of this measure.

SECTION 20. Conformity to State Laws

1. For the personal income tax, it is Metro's policy to follow the state of Oregon laws and regulations adopted by the Department of Revenue relating to personal income tax. The Supportive Housing Services Revenue will be construed in conformity with laws and regulations imposing taxes on or measured by net income.
2. For the business profits tax, it is Metro's policy to utilize, as guidance, the Multnomah County Business Income Tax rules and procedures.
3. If a question arises regarding the tax on which this measure is silent, the Chief Operating Officer may look to state law for guidance in resolving the question, provided that the determination under state law is not in conflict with any provision of this measure or the state law is otherwise inapplicable.

SECTION 21. Tax as a Debt; Collection Authority

1. The tax imposed by this measure, as well as any penalties and interest, becomes a personal debt due to Metro at the time such liability for the tax is incurred.
2. Metro is authorized to collect any deficient taxes, interest and penalties owed. This includes initiating and defending any civil actions and other legal proceedings.

FURTHER IMPLEMENTATION

SECTION 22. Administrative Rules

The Chief Operating Officer or designee may adopt administrative rules, forms, guides and policies to further implement the provisions of this measure. Any rule adopted by the Chief Operating Officer has the same force and effect as any Metro Code provision. In adopting administrative rules, the Chief Operating Officer or designee may seek guidance from the Oregon Department of Revenue's rules and procedures and Multnomah County's business income tax's rules and procedures.

SECTION 23. Tri-County Planning

1. Metro will annually allocate a portion of resources from its administrative costs to provide the staffing and logistical support to convene and maintain a tri-county homeless services planning body. This body will develop and implement a tri-county initiative that will be responsible for identifying regional goals, strategies, and outcome metrics related to addressing homelessness in the region.
2. The counties must present to the regional services oversight committee for its approval a proposal to implement the tri-county planning requirement.
3. Each county must annually contribute no less than five percent of each of the counties' share of the Supportive Housing Services Revenue to a regional strategy implementation fund.
4. The proposed governance structure of the tri-county planning body must be inclusive of people representing at least the perspectives required in Section 6(4).
5. Within one year of the adoption of the tri-county initiative plan, and as needed thereafter, each county will bring forward amendments to its Local Implementation Plan that incorporate relevant regional goals, strategies, and outcomes measures.

DEFINITIONS

SECTION 24. Definitions

For the purpose of this measure, the terms used are defined as provided in this section unless the context requires otherwise.

Nonresident means an individual who is not a resident within the Metro jurisdictional boundary.

Person means, but is not limited to an individual, a natural person, proprietorship, partnership, limited partnership, family limited partnerships, joint venture (including tenants-in-common arrangements), association, cooperative, trust, estate, corporation, personal holding company, limited liability company, limited liability partnership or any other form of organization for doing business.

Resident means a taxpayer domiciled within the Metro jurisdictional boundary for any portion of the taxable year.

Supportive Housing Services means homeless prevention, support services and rent assistance that stabilize people experiencing homelessness and housing instability, including those specific services described in Section 4.

Supportive Housing Services Revenue means all funds received from the taxes imposed by Section 10.

Tax Year means the taxable year of a person for federal or state income tax purposes.

Taxpayer means any natural person, or married couple or head of household filing a joint return, whose income in whole or in part is subject to the tax imposed by this measure.

SECTION 25. Severability

If a court of competent jurisdiction finds any part, section or provision of this measure to be unconstitutional, illegal or invalid, that finding affects only that part, section or provision of the measure and the remaining parts, sections or provisions remain in full force and effect.

EXHIBIT 2
Local Implementation Plan

EXHIBIT 3
Metro SHS Work Plan

EXHIBIT 4
Contact Information for Notices

If to Metro:

Metro
Office of the Council President
600 N.E. Grand Avenue.
Portland, Oregon 97232
Email: lynn.peterson@oregonmetro.gov
Phone No.: 503-797-1700

and:

Metro
600 N.E. Grand Avenue.
Portland, Oregon 97232
Attn: Chief Operating Officer
Email: marissa.madrigal@oregonmetro.gov
Phone No.: 503-797-1700

With copies to:

Office of Metro Attorney
Metro
600 N.E. Grand Avenue
Portland, Oregon 97232
Attn: Carrie MacLaren
Email: Carrie.MacLaren@oregonmetro.gov
Phone No.: 503-797-1511

If to Clackamas County:

Clackamas County
Office of the County Chair
2051 Kaen Rd.
Oregon City, Oregon 97045
Email: bcc@clackamas.us
Phone No.: 503-655-8581

and:

Clackamas County
Finance Department
2051 Kaen Rd.
Oregon City, Oregon 97045
Attn: Finance Director
Email: EComfort@clackamas.us
Phone No.: 503-936-5345

With copies to:

County Attorney
2051 Kaen Rd.
Oregon City, Oregon 97045
Attn: Stephen Madkour
Email: smadkour@clackamas.us
Phone No.: 503-742-4623

If to Multnomah County:

Multnomah County
Office of the County Chair
501 N.E. Hawthorne Blvd., Suite 600
Portland, Oregon 97214
Email: mult.chair@multco.us
Phone No.: 503-988-3308

and:

Multnomah County
Finance and Risk Management Division
501 N.E. Hawthorne Blvd.
Portland, Oregon 97214
Attn: Chief Financial Officer
Email: eric.j.arellano@multco.us
Phone No.: 503-988-6229

With copies to:

County Attorney
501 N.E. Hawthorne Blvd.
Portland, Oregon 97214
Attn: Jenny Madkour
Email: jenny.m.madkour@multco.us
Phone No.: 503-988-3138

If to Washington County:

Washington County
Office of the County Chair
155 N First Avenue, Suite 300
Hillsboro, Oregon 97124
Email:
kathryn_harrington@co.washington.or.us
Phone No.: 503-846-8681

and:

Washington County
Finance and Risk Management Division
155 N First Avenue, Suite 300
Hillsboro, Oregon 97124
Attn: Chief Financial Officer
Email: ethel_gallares@co.washington.or.us
Phone No.: 503-846-8004

With copies to:

County Attorney
155 N First Avenue, Suite 300
Hillsboro, Oregon 97124
Attn: Tom Carr
Email: Tom_Carr@co.washington.or.us
Phone No.: 503-742-4623



CLACKAMAS COUNTY
LOCAL IMPLEMENTATION PLAN
METRO SUPPORTIVE HOUSING SERVICES
PROGRAM
April 2021

Approved by HACC Board April 13th, 2021
Amended with explanatory notes May 10th, 2021

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We take this opportunity to thank the original caretakers of this land, members of the Confederated Tribes of the Grand Ronde including the Kalapuya, Molalla, Clackamas, and Chinook, as well as other bands and tribes. We are on this land because of the forced removal of its traditional peoples by colonists and settlers. As settlers and/or guests, we recognize the strong and diverse Native communities in our region today, from Tribes both local and distant, and offer respect and gratitude for their stewardship of these lands—past, present and future.

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Contracted partners

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Corporation for Supportive Housing (CSH) -
Heather Lyons, Brooke Page, Margaret Kilman
Haven Consulting - John Miller

LIP Steering Committee

Jill Smith – H3S representative
Commissioner Sonya Fischer – Board
Representative
Kenzie (MacKenzie) Wige – YAB Representative
Jeff Gage – Housing Authority Resident
Representative
Peter Rosenblatt – Continuum of Care
Representative
Tabitha Alajmi – Member at Large
Jana Hak – Member at Large
Katrina Holland – Member at Large
Rose Ojeda – Member at Large
Bridget Dazey – Member at Large
Tony Venzia – Member at Large
Awaz Muhamad – Member at Large
LIP Meeting Facilitators - Vahid Brown (county
staff) & Brooke Page (CSH)
Staff support - Abby Ahern (CD), Beth Byrne
(PGA), Erin Fernald (HACC)
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Kilman

County Staff

SHS Ongoing Measure Workgroup – Jill Smith,
Vahid Brown, Abby Ahern, Beth Byrne, Erin
Fernald
HACC – Jill Smith, Vahid Brown, Erin Fernald,
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Inclusion – Martine Coblentz and Csea Leonard

Local jurisdictions – SHS presentations

Oregon City
West Linn
Sandy
Wilsonville
Lake Oswego

Clackamas County Community Groups, Advisory Boards, Committees, Provider Groups & general public engagement

Clackamas County Business Alliance
Clackamas County Outreach Connections
North Clackamas Community Connect
Emergency Medical Services Council
(EMSC)
Clackamas County Early Childhood
Community Council (CCECC)
Mental Health and Addiction Council
Continuum of Care (CoC)
Family Violence Coordinating Council
Clackamas County Youth Action Board
(YAB)
Youth Homelessness Demonstration
Program (YHDP) Planning Group
Community Action Board (CAB)
Clackamas County Weatherization and
Energy Education Program
Prescription Opioid Task Force
Aging and People with Disabilities
Public Health Advisory Council
Law Enforcement (CCSO, DA, Community
Corrections, LEAD)
Clackamas County Community Health
Council

Here Together Event Providers

Two Foxes Singing (Nunpa), Ant Farm
Mellani Calvin, ASSIST Program Social
Security program assistance
Michael Nomina, Cascadia Behavioral
Health
Debra Mason, Clackamas Service Center
Tabitha Alajmi, Clackamas Service Center
Angie Drake, Clackamas Women’s
Services

Here Together Event Providers

Diana Camarillo, Clackamas Women’s Services
Melissa Erlbaum, Clackamas Women’s Services
Scott Davis, Clackamas Women’s Services
Bridget Dazey, Clackamas Workforce
Partnership
John Miller, Clackamas County Service
Improvement Consultant
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Organization (IRCO)
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Jana Hak, Impact Northwest
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Corina Daugherty Calhoun, Lifeworks
Northwest
Brandi Johnson, Love One
Andrew Brown, Metro Home Share
Sean Suib, New Avenues for Youth
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Peter Rosenblatt, Northwest Housing
Alternatives
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Services
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Executive Summary

Right now, **thousands of our neighbors throughout the Metro region are experiencing, or at risk of, homelessness.**

A large and growing percentage of these neighbors are considered chronically homeless. That means they have one or more disabling conditions, extremely low incomes, and have been living unsheltered or in emergency shelter for long periods of time.

At the same time, many other neighbors experience what's known as episodic homelessness, meaning they experience shorter periods of homelessness. They may be living involuntarily doubled or tripled up, or they are paying such a high percentage of their limited income on rent and utilities that they continually face a substantial risk of becoming homeless.

Every aspect of **this crisis disproportionately and increasingly impacts Communities of Color** due to persistent structural, institutional and individual racism.

In recent years, Clackamas County has stepped up its housing and services efforts and investments to address our growing homeless population. But without the resources necessary to increase those responses, the social and economic forces that put so many people on our streets — and then keep them there — have continued to outpace our efforts.

With the passage of Metro Ballot Measure 26-210, the Tri-County region has a rare opportunity to confront the true scale of this crisis. By making unprecedented investments that center racial equity, leverage existing systems, and provide the flexibility necessary to offer truly participant-centered approaches to meeting the needs of our un-housed neighbors, **we can reduce rates of chronic and short-term homelessness, and racial disparities.**

Measure 26-210¹, also known as the Supportive Housing Services Measure, adds a regional income tax on high-earning households and a regional profit tax on businesses grossing more than \$5 million. The Measure is projected to generate as much as \$248 million a year across the Metro region, once fully implemented. **Of that, approximately \$51 million a year is expected to come to Clackamas County.**

With that new funding, governments across the Tri-County region will be able to grow and sustain the **critical interventions that actually end homelessness**, including rent assistance and other support services vital to helping keep people housed, while also investing in emergency options like shelter.

The largest share of funding raised by the Measure will address chronic homelessness. The measure prioritizes 75% of funds for extremely low-income households (0-30% Median Family

¹ [Exhibit A](#) to Metro Ordinance 20-1442 provides additional details.

Income [MFI]) with at least one disabling condition who are experiencing or at imminent risk of experiencing long-term literal homelessness.

The remaining 25% will be devoted to services for very low-income households (up to 50% MFI) who are either experiencing or are at substantial risk of experiencing homelessness.

Within both of those groups, the Measure also prioritizes Communities of Color.

As part of its responsibility for implementing the Measure, Metro requires each of the three counties to develop a high-level Local Implementation Plan that centers racial equity, is informed by a comprehensive community engagement process, and identifies investment priorities for rent assistance and supportive services. Metro also requires that each plan include detailed accountability metrics.

Clackamas County developed its Local Implementation Plan (hereafter “this Plan” or “the Plan”) with guidance from the Plan’s advisory body, the newly formed Supportive Housing Services Steering Committee (the Committee). The Committee includes voices from local government, service providers, people with lived experience, faith organizations, Communities of Color, and business groups.

An extensive community engagement process that prioritized Communities of Color and included a series of focus groups and a survey of more than 116 community members and stakeholders also shaped the Plan.

Metro has outlined what must be addressed in each County’s Local Implementation Plan. Among the most critical sections of this Plan are:

- (1) **An Analysis of Inequitable Outcomes:** Rooted in an understanding of the role that historical and current racism play in causing overrepresentation of Communities of Color among people experiencing homelessness, this section reviews quantitative and qualitative data demonstrating disparities in rates of homelessness, as well as disparate rates of access to, and successful outcomes from, current homeless services. The analysis provides a foundation for the Plan’s specific strategies to reduce disparities and improve outcomes for People of Color experiencing chronic and episodic homelessness.
- (2) **Investment and Gaps Analysis:** This section reviews the best available data on the level of regional unmet need for housing and support services among those experiencing homelessness, including an estimate of just under 5000 people who experience chronic homelessness each year. Following a review of current investments in the continuum of homeless services, the Plan details the results from community engagement that identified the critical gaps in supportive housing, rental assistance, behavioral and other support services, shelter, and the capacity of our community-based organizations to expand to meet the objectives of the Measure.

(3) **Investment Priorities:** Building upon the racial equity analysis and the identified needs and gaps, this section lays out the important values that will guide how services are delivered, including offering culturally specific and responsive services that are participant centered, trauma-informed, low-barrier, and continuously evaluated to improve outcomes.

This Plan commits Clackamas County to work with Metro, Multnomah and Washington Counties to create a truly regional system of care and to ensure an equitable geographic distribution of services.

This Plan also commits Clackamas County to meet agreed outcomes. Those include Metro’s identified regional outcome metrics related to how many people achieve housing stability (disaggregated by race). They also include metrics set by Metro meant to measure whether services are delivered equitably, and whether people with lived experience of homelessness and People of Color have had a prioritized role in the planning and oversight of all aspects of this Measure.

This Plan will be the foundation for Clackamas County’s ongoing implementation planning efforts. Through this framework and those efforts, we will deliver on the promise of the Metro Supportive Housing Services Measure to finally provide a scaled, comprehensive, and equitable regional response to the homelessness crisis.

Background

Our region faces a homelessness and housing crisis. In 2017, at least **24,260** households experienced homelessness across the Tri-County region.² Among those most severely impacted by the crisis are a subset of an estimated 4,936 people, disproportionately People of Color, who have acutely disabling conditions, extremely low-incomes³, and are experiencing long periods of street and shelter homelessness. Many thousands more, also disproportionately People of Color, are experiencing shorter periods of homelessness, are involuntarily doubled or tripled up living with friends and family, or are paying such a high percentage of their limited income on rent and utilities that they are always at substantial risk of becoming homeless.

On May 19, 2020, voters in Multnomah, Washington, and Clackamas Counties took an unprecedented step toward meeting the needs of these two populations, with a particular focus on addressing the housing and support service needs of those extremely low-income individuals with disabilities who are experiencing long periods of street and shelter homelessness. Voters passed Metro ballot Measure 26-210⁴, imposing a regional income tax on high-earning households and a regional business profit tax on businesses grossing over \$5 million.

The Metro Supportive Housing Services (SHS) Measure was intentionally brought forward to work in concert with recent large-scale regional and local housing-focused investments and initiatives, and in particular the needs of Black, Indigenous, People of Color, and immigrants and refugees. Although expected to make a sizable impact in addressing the housing and services needs for these populations, this program cannot meet its potential without continued and expanded investments from the federal and state governments, full participation from health care systems, and continued support from the private and philanthropic sectors.

Homelessness in the Tri-County region

Estimates of homelessness in the region range between 6,000 and 12,000 people. In January 2019, the Point in Time count identified 5,711 people experiencing homelessness in Clackamas, Multnomah and Washington counties. Additionally, the Oregon Department of Education counted more than 7,000 students who experienced homelessness in the 2018 school year in Metro-area school districts. These reports undercount people experiencing homelessness while staying with a friend or family, or living in vehicles. In recent years, more people are experiencing ‘chronic’ or prolonged homelessness. Approximately 3,123 to 4,936 people in the region experience homelessness related to complex and disabling conditions.

² Zapata M, Liu J, Everett L, Hulseman P, Potiowsky T, & Willingham E. (2019). *Governance, Costs, and Revenue Raising to Address and Prevent Homelessness in the Portland Tri-County Region*. Portland State University. Retrieved from: <https://www.pdx.edu/homelessness/faculty-and-staff-research>.

³ Extremely low-income is defined as a household that makes 0-30% of the Median Family Income for that area.

⁴ [Exhibit A](#) to Metro Ordinance 20-1442 provides additional details.

The January 2019 count found that the majority of those surveyed are longtime Oregonians who lost access to housing because of rent increases. A quarter of people experiencing homelessness in greater Portland were born in the region; more than half had lived in the region for more than two years. Thirty-six percent were People of Color, including 14 percent of indigenous ancestry. More than three-quarters had a disability. Nearly half had experienced domestic violence.

The prevalence of unsheltered homelessness, when unaddressed, produces enormous costs across multiple public systems. In 2019 Clackamas County commissioned Portland State University to study frequent utilization of public services and its associated costs. The study found that the top 100 people with the highest utilization of emergency medical services and jail bookings cost these systems an estimated \$4.2 million per year in Clackamas County. Most of them were experiencing homelessness or housing instability and had behavioral health conditions. This cost is significantly higher than the annual cost to provide 100 households with housing and supportive services.⁵

There are many factors that have led to this disturbing reality. Some prominent drivers of the current state include the very high cost of housing, stagnant wages, a long history of housing discrimination towards communities of color, and an intentional disinvestment in our Mental Health system.

Racist housing policies in Oregon

The Fair Housing Council of Oregon provides the following brief history of racist housing policies in Oregon, summarized here⁶:

The unfolding of housing discrimination in Oregon parallels events and circumstances in American history. People perceived to be different have always been subject to bias in housing in the state and throughout the country. Discrimination in Oregon has been more than personal prejudice. State and federal laws have historically provided institutional sanction. In the mid-1800s the U.S. Bureau of Indian Affairs confined Indians in Oregon to 12 reservations, segregating them from white communities.

Most immigrants to the Oregon Territory shared a white Protestant heritage and held conflicting values regarding African Americans. Immigrants from Northern free soil states generally opposed slavery. Immigrants from Southern and Border slave states often had strong prejudices. Small farmers from both regions viewed African Americans as a threat to their livelihood, fearing competition from slave-holding farmers. As a result of opposing perspectives between settlers, a series of exclusion laws passed between 1844 and 1857 declared Oregon a free state, but made it “unlawful for any Negro or mulatto to come in or reside” in Oregon.

⁵ *FUSE: People with Frequent Utilization of Public Services in Clackamas County, Oregon.* Karen Cellarius et al., Portland State University Homelessness Research and Action Collaborative, 2019.

https://pdxscholar.library.pdx.edu/hrac_pub/17/

⁶ <http://fhco.org/images/displaypanels8.pdf>

Oregon joined the Union in 1859, the only free state with an exclusion clause in its constitution. “No free Negro, or mulatto, not residing in this State at the time of the adoption of the constitution shall come, reside or be within this State, or hold any real estate.”

In the 1920s Oregon had clearly segregated housing patterns. African Americans and Asian Americans seeking homes or apartments in white neighborhoods were repeatedly turned away. Real estate appraisers evaluated homes based on the neighborhood’s racial or ethnic composition. Oregon’s racial climate became so uninviting by the 1930s that many African Americans left the state.

Real estate agents, looking to protect their investments, wrote restrictive covenants into property deeds. The covenants prevented ethnic, racial and religious minorities from living in certain residential areas. They proved an effective tool to deprive minorities free choice in housing. A 1926 US Supreme Court ruled covenants legally enforceable.

In 1968, following the assassination of the Rev. Dr. Martin Luther King Jr., Congress enacted Title VIII of the Civil Rights Act, also known as the “Federal Fair Housing Act.” The law prohibited discrimination in the sale, rental or financing of housing based on race, color, religion, or national origin. Real estate agents and landlords could no longer discriminate openly. Unfortunately, discriminatory practices persisted. Although the 1968 act committed the government to the goals of fair housing, enforcement was difficult.

To this day, many subtle discriminatory practices persist, and have led to decreased access to opportunities and the creation of wealth. As a direct result of these discriminatory practices, Communities of Color continue to be affected by housing instability and experience a disproportionately high rate of homelessness.

Disinvestment in mental health services

Since 1981, the US Federal Government has steadily disinvested in institutional mental health programs. The Reagan Administration initiated an effort to defund mental health programs and left it up to the states to develop new strategies to assist community members with long-term chronic mental health issues, with limited federal funding to support the efforts.⁷

Under the new federal limits, states had incentives to close their mental health institutions. Decisions in both the state and federal courts also changed how funding for mental health services was distributed, further shrinking state hospitals. A 1975 Supreme Court decision (*O’Connor v. Donaldson*) held that people not deemed to be a threat to themselves could not be hospitalized against their will. After that decision, hospitals became forensic institutions for the most part, housing criminal offenders or individuals awaiting trial. As a result, from 1970 to

⁷ <https://origins.osu.edu/article/americas-long-suffering-mental-health-system/page/0/1>

2016, the number of inpatient psychiatric beds in the United States declined from 413,000 to 37,679. Oregon’s Dammasch Hospital, located in Wilsonville, closed in 1995.

Once people exited hospitals, their destinations varied. Backers of this strategy hoped that former residents would go home to families, but in many cases, they had no family connections. Without family to support them, and often having never lived independently, people with mental illness often turned to local programs for support, but that support was inadequate to meet the overwhelming need. With no options, many people were forced into homelessness and an overwhelmed service delivery system.

The disinvestment in mental health services is only one contributing factor in the current homelessness crisis, and mental health conditions represent one of many of factors that may lead to homelessness.

A regional approach

The SHS Program attempts to correct years of discriminatory practices and disinvestment and focuses on addressing housing instability for people experiencing homelessness across the Tri-County region, with a call to share responsibility and strengthen coordination between the three counties. Clackamas, Multnomah and Washington counties recognize that a regional approach is required to effectively address services and resource gaps to meet the needs of these priority populations. The counties cannot design responses based on local data alone, which are reflections of traditionally siloed systems developed when homelessness and housing crises were more localized and less severe. We know that people accessing homeless system services “often travel to meet their housing, service and employment needs, and the data show the impact on communities in the region⁸” The Corporation for Supportive Housing (CSH) found that at least 2,600 people experiencing homelessness were served in more than one of the counties in the region between 2014 and 2016.

The three counties have agreed that enhancing and expanding local systems of care to more equitably address unmet needs across the region, particularly in supportive and affordable housing, is of the utmost importance. The SHS Measure initially divides program funds between the three counties as follows: Multnomah County (45.3%), Washington County (33.3%) and Clackamas County (21.3%). The counties will develop and enhance local homeless systems of care that address the need of priority populations in a similarly proportionate manner.

Regional Guiding Principles

Clackamas County’s Local Implementation Plan and its implementation are guided by regional principles developed by the Metro Supportive Housing Services Program Stakeholder Advisory Group (see Appendix D).

⁸ Corporation for Supportive Housing [CSH]. (2019). *Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness*. Retrieved from: <https://www.csh.org/resources/tri-county-equitable-housing-strategy-to-expand-supportive-housing-for-people-experiencing-chronic-homelessness/>

Program oversight and Plan approval process

A regional Oversight Committee that includes five appointed representatives from each of the three counties, and five elected delegates (one from the City of Portland, Clackamas County, Multnomah County, Washington County, and Metro) provides oversight for the SHS Program. The Housing Authority of Clackamas County's Board of Commissioners, and, eventually, a newly formed SHS Advisory Board comprised of members of the community, will oversee Clackamas County's program.

Housing Authority staff will recommend this Plan for approval locally in the following order:

- The Supportive Housing Services Steering Committee
- Housing Authority of Clackamas County's Board
- SHS Regional Oversight Committee
- Metro Council

Once approved, this plan will be included in the Inter-Governmental Agreement between Metro and Clackamas County.

The Housing Authority of Clackamas County

The Housing Authority of Clackamas County (hereafter "HACC") is the lead entity responsible for SHS Program implementation for Clackamas County. HACC is a separate legal entity organized under State Statute ORS 456, and is a Division within the Health Housing and Human Services Department. The Housing Authority Board consists of the 5 elected County Commissioners and one Resident Commissioner.

With an annual operating budget of approximately \$27 million, HACC maintains 445 public housing units, ~1,800 Housing Choice Vouchers, and 357 units of affordable and special needs housing. Clackamas County's Continuum of Care (CoC) and Coordinated Housing Access systems will also play an integral role in the execution of this plan.

Clackamas County's Local Implementation Plan is intentionally broad and will continue to evolve through additional community engagement. The following sections of this Plan contain Clackamas County's best efforts to identify population needs, system and services gaps, and initial investment priorities to address the identified unmet needs. As we implement initial strategies and work with stakeholders to plan implementation details, additional opportunities will arise for adjustment and improvement, and we will make amendments to this Plan as needed.

Plan development

This Plan identifies and outlines unmet needs and investment priorities for rental assistance and supportive services programs across Clackamas County for extremely and very low-income households experiencing/at substantial risk of experiencing homelessness. The program prioritizes Communities of Color, and 75% of funds are prioritized for extremely low-income households (0-30% MFI) with at least one disabling condition that are experiencing or at imminent risk of experiencing long-term literal homelessness.

Clackamas County is firmly committed to centering racial equity at every stage of SHS planning and program development, and is working to identify and eliminate barriers that prevent participation from Communities of Color in stakeholder engagements and in accessing services. This Plan is informed by the best-available data, which has been disaggregated by race, as well as by the rich stakeholder input gained through an extensive and inclusive community engagement process that centered the voices of Communities of Color. Clackamas County staff, the Corporation for Supportive Housing ([CSH](#)), [UNITE Oregon](#) and the [Coalition of Communities of Color](#) (CCC) conducted extensive external engagement, particularly among Communities of Color, to inform the development of this plan.

To guide and assist the development this Plan, HACC established the Clackamas County Supportive Housing Services Steering Committee (hereafter referred to as “the Committee”). This Committee, which included 11 members and a County Commissioner, worked with and advised HACC staff to create and unanimously approve this Plan. The Committee charter specifies that at least half of the at-large members are People of Color.

Committee membership includes a:

- Youth Action Board representative
- Member representing the Continuum of Care (CoC) Steering Committee
- Resident of a Housing Authority property
- Staff member from the Clackamas County Health, Housing and Human Services department
- Member with lived experience
- Member with experience from a culturally specific/ responsive provider
- Member from the faith, business or philanthropic sector
- Member from the physical and/or behavioral health sector
- County Commissioner serving in a non-voting capacity

Information about the Committee charter, members and the work timeline is available in Appendix B.

Commitment to racial equity

Racism is a primary driver of homelessness. Through historical policies such as slavery, the Indian Removal Act of 1830, redlining, and Federal Housing Administration (FHA) loan discrimination, Communities of Color have been systematically excluded from land and property ownership. This legacy shapes the current configuration of housing and homelessness within our community. Additionally, systemic racism is infused within all social systems; housing, criminal justice, education, healthcare, and social services, which shape opportunities for individuals and communities. The confluence of these systems generates an ongoing channel to homelessness that disproportionately impacts Communities of Color, and makes it significantly more challenging for People of Color to escape homelessness. People of Color are also subjected to the ongoing indignities of interpersonal racism — both implicit and explicit — as they navigate services and community. These different dynamics create a constellation of factors that must be eliminated.

To counter the ongoing mechanisms of racism and create systems that prioritize Communities of Color, HACC and Clackamas County are firmly committed to implementing racial equity into all organizational functions and SHS service strategies, in accordance with our adopted racial equity lens.⁹

Organizational equity plans and the prioritization of culturally specific organizations will be two components of the ongoing system expansion efforts through the Metro Supportive Housing Services Measure. All new and expanded programs and services offered by service providers will be required to develop and submit an organizational equity plan that centers racial equity and incorporates culturally responsive practices into their service delivery model. The centering of racial equity will also be a core component of all procurement processes throughout the life of these investments. Furthermore, HACC will collaborate with Multnomah and Washington counties toward forming an advisory group composed of culturally specific organizations to inform the homeless system of care's expansion.

Centering the perspectives and experiences of Communities of Color and culturally specific organizations was foundational to the development of this Plan. This occurred through multiple strategies that manifested through facilitated dialogues, a survey for individuals currently experiencing unsheltered homelessness, and engagements with culturally specific organizations. An equity lens was utilized in the design and actualization of all community engagement functions (see appendix C). All facilitated dialogues were oriented around racial equity, with a specific emphasis on identifying the needs of Communities of Color, and surveys asked specific questions to identify the particular experiences of individuals of color.

Inclusive community engagement

Inclusive community engagement played a major role in the development of the Clackamas County Plan. HACC staff, along with staff from the Corporation for Supportive Housing (CSH), conducted a series of virtual community engagement opportunities with various community and stakeholder groups to solicit feedback, experience and ideas to identify gaps in the homeless system of care, barriers experienced by Communities of Color, and to inform investment priorities for the SHS program. From October 2020 – January 2021, HACC and CSH rotated facilitating 20 stakeholder community engagement meetings with groups such as the Social Services Community Action Board, the Youth Action Board, the CoC, the Emergency Medical Services Council, and the Health Centers Community Health Council. A full list of engagement meetings and the common themes can be found in the *Housing Authority of Clackamas County and Corporation for Supportive Housing Outreach and Engagement Report* (Appendix H).

We also conducted a general public survey to capture feedback and perspectives, and 116 people responded. A majority of respondents identify as white or Western European women, who are primarily English speakers between the ages of 35 and 64. The results of this survey

⁹ See Appendix C, *Housing and Affordability Homelessness Task Force Equity Lens*

were distilled and synthesized to highlight the most common themes. Survey responses generally aligned with the priorities and gaps identified by the Committee and SHS Community Engagement meetings. These priorities include: adding emergency shelter opportunities; increasing services including housing support; and including mental health services and substance use treatment. The full survey results are included in Appendix H.

Additionally, to gather feedback and elevate the voices of people highly impacted by housing and service insecurity, Clackamas County contracted with the Coalition of Communities of Color, an alliance of culturally-specific community based organizations, and UNITE Oregon, an organization charged with building a unified intercultural movement for justice. The Coalition of Communities of Color and UNITE Oregon organized three virtual focus groups in November and December of 2020 in which 34 people participated. The demographic focus for each group included: Spanish language (10 participants); Black, Brown, Indigenous People of Color (in English) (10 participants); and Social Service Providers (in English) (14 participants). UNITE Oregon also developed a community survey in which 10 people participated. The details of the scope of work, methodology, demographic characteristics of each focus group, and summary data of the engagements can be found in “*Community Engagement Report – Phase One*” (see Appendix G).

In December 2020 the HereTogether Coalition convened a listening session of community based organizations (CBOs) to provide input to HACC on the challenges and opportunities that providers foresee in partnering with Clackamas County in the implementation of the SHS program. More than 40 individuals, representing 30 CBOs, attended this listening session. The discussion focused on opportunities and recommendations for improving the contracting and procurement processes and homeless service delivery system in Clackamas County. HereTogether’s full report on the outcomes of this listening session can be found in Appendix I.

HACC, CSH, the Coalition of Communities of Color and UNITE Oregon conducted broad outreach efforts and provided reasonable accommodations to enhance participation in focus groups, surveys, and on the Committee. Committee members attended 2.5-hour virtual meetings, monthly or bi-monthly, and members who were not otherwise being paid for their time for serving on the committee were eligible for stipends. UNITE Oregon offered focus group participants \$50 stipends per person, and survey respondents \$25 stipends for their participation. In addition, UNITE Oregon made tablet technology available to focus group participants to ensure accessibility of remote meetings and provided real-time, bi-lingual interpretation at the first focus group.

This Plan represents high-level strategies for investments and, therefore, Clackamas County will continue to engage stakeholders, with a specific emphasis on Communities of Color, to inform specific investments and the design of SHS programs as defined under Inclusive Decision Making, below.

Centering the perspectives of Communities of Color and those with lived experience

Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion incorporates five key objectives:

- Convene and support regional partners to advance racial equity
- Meaningfully engage Communities of Color
- Hire, train, and promote a racially diverse workforce
- Create safe and welcoming services, programs, and destinations
- Have resource allocations that advance racial equity

To evaluate processes and decision making from a racial equity frame, the Committee committed to apply the Clackamas County Housing Affordability and Homelessness Task Force's Equity Lens (see Appendix C) to every step of this process. The equity lens requires decision makers to consider impacted communities and incorporate their input, and to consider disparate implications and/or unintended consequences, benefits, and challenges that may affect highly impacted communities.

A robust community engagement effort along with a work planning session by the Committee provided foundational strategies to address inequities within the local SHS Program, which can be found in the Racial Equity Analysis of this plan. While these strategies focus on racial equity as articulated in the Required Elements, there are many recommendations that apply to overall implementation of the SHS Program

Continued inclusive engagement strategies

This Plan represents initial strategies for investments and, therefore, HACC will continue to engage stakeholders, with an emphasis on engaging Communities of Color and other historically underserved communities (including the LGBTQIA2S+ community and youth), to inform specific investments and the design of SHS programs.

HACC will continue to employ strategies that promote inclusive engagement, including:

- Scheduling additional engagements with options outside of normal business hours
- Providing stipends, child-care services, translated meeting materials and provided interpretation services, along with other barrier-mitigating strategies and incentives for participation whenever possible
- Intentionally engaging culturally specific organizations, especially smaller organizations, to evaluate specific needs for capacity to grow programs and develop competitive funding applications
- Leveraging HACC and H3S committees, workgroups and system coordination groups

Analysis of inequitable outcomes

The following analysis is a framework to identify and address racial disparities within the homeless system of care in Clackamas County. Overall, the analysis reiterates what the community has known for years — Communities of Color are overrepresented in the homeless

population, they face significant barriers to accessing resources, and many experience worse outcomes in homeless and housing programs than non-Hispanic white households. In this section, we also begin to identify the policies and practices that represent barriers for Communities of Color, and some of the strategies to remove those barriers. This is a high-level review, and significant additional work will need to be done as we move toward full implementation of the SHS Program.

Racial Equity Analysis

The disproportionate rates of homelessness among Communities of Color can be traced to centuries of policies that prevented People of Color from accessing resources. Policies such as redlining, where Communities of Color were more likely to be denied access to Federal Housing Administration (FHA) loans, and eminent domain, where Communities of Color were displaced at higher rates, ultimately excluded many individuals from Communities of Color from home ownership, which is necessary for housing stability and building wealth. Further, policies that limit the level and duration of services and financial assistance for immigrants and refugees force many to take any housing or employment resource immediately available, cutting off future opportunities.

In July of 2019, Clackamas County staff analyzed data found in the Continuum of Care (CoC) and Coordinated Housing Access (CHA) systems to assess race and ethnicity representation levels within those systems, and to determine whether certain populations were over- or under-represented. The report sought to determine if services were reaching the community in an equitable way, and, if not, identify solutions to encourage equitable access. The report used statistical analysis to compare two groups of people. The first group is made up of those experiencing poverty in Clackamas County. The second group is made up of those who participated in homeless services programs. The analysis looked at differences between these two groups' racial and ethnic make-up to identify disparities.

The report indicated several disparities. Consistent findings across all analyses include:

- A higher than expected percentage of people who identified as Black/African American and Multiracial people in all CHA-related categories when compared with SNAP and County poverty data
- A higher than expected percentage of Hispanic/Latinx people in housing programs
- A lower than expected percentage of people who identified as white and, by a significant margin, Asian, in all CHA-related categories compared with County poverty & SNAP data

Of concern is the higher than expected exits to temporary destinations (rather than permanent) for both Black/African American people and Native American/Alaska Native people.

Historical, institutional and systemic racism, disparate impacts of screening criteria (including credit and background checks on Black/African American and Native American/Alaska Native people), and less access to assets from family and friends for people from most Communities of

Color likely explain higher than expected numbers of participants from Communities of Color in CHA programs. Additionally, insufficient or ineffective outreach within Asian communities likely led to lower than expected participation. HACC is committed to ongoing engagement with people from groups affected by these disparities to gain a better understanding of the causes and identify appropriate solutions.

The report offers several suggested strategies to address racial disparities:

- That providers ensure that People of Color, especially communities with a higher percent of exits to temporary destinations, receive the type, level and duration of permanent housing and support services that meets their needs
- That providers continue to focus on hiring and retaining staff that reflect the diversity of the service population, including direct service staff and management/administrative staff
- Ensuring an increase in outreach strategies to Asian populations

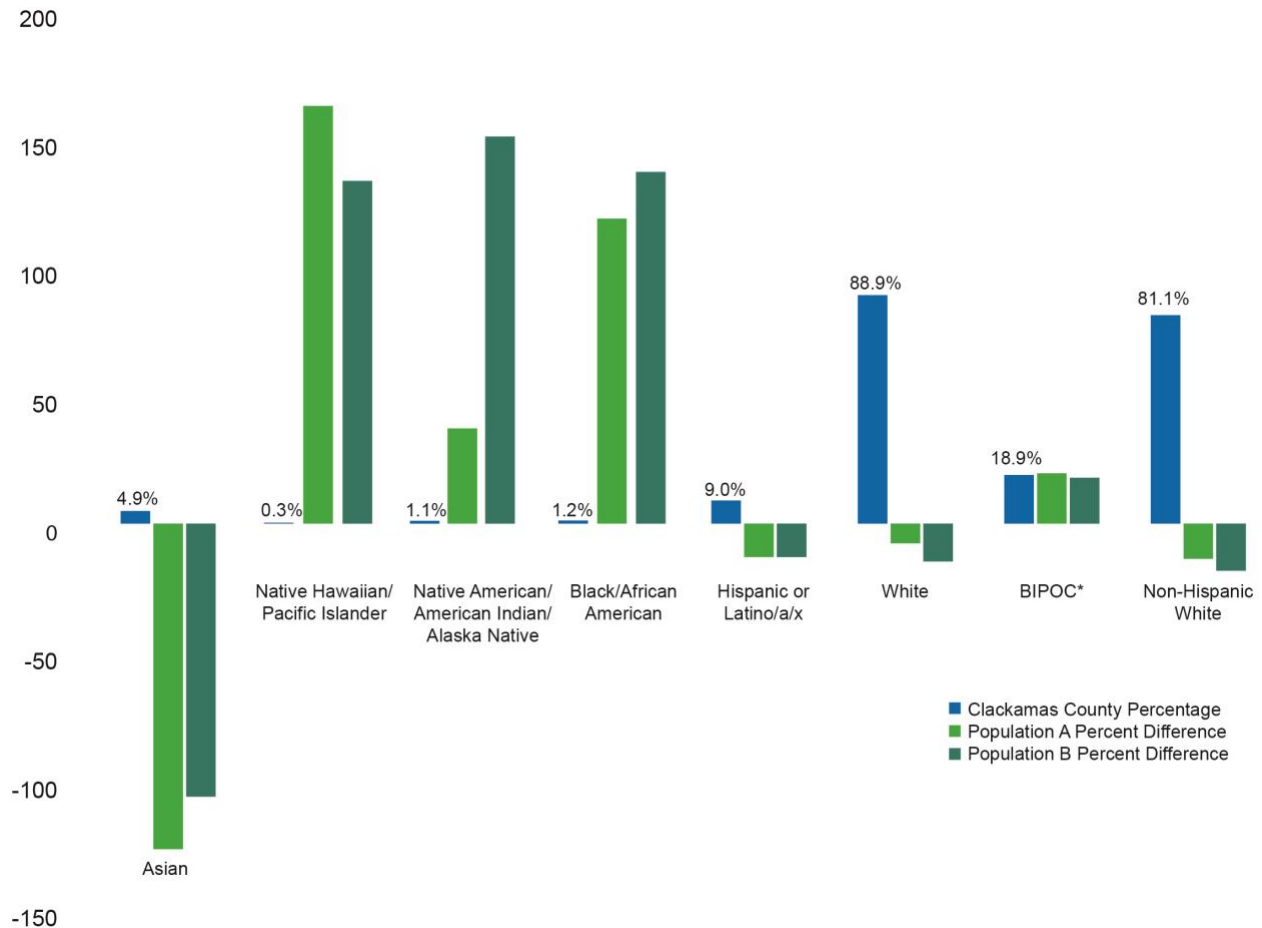
For the complete report that includes data and analysis, please refer to Appendix J.

To further assess the racial disparities within the homeless service system in Clackamas County, The Corporation for Supportive Housing (CSH) prepared the following analysis that provides a quantitative review of the racial disparities within the system. It focuses on the SHS Program priority populations: “Population A,” defined as extremely low-income, having one or more disabling conditions, and experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness; and “B,” experiencing homelessness or having a substantial risk of experiencing homelessness.

Overall, the analysis provides an empirical representation of the reality that Communities of Color are overrepresented in the homeless population, face significant barriers to accessing resources, and may experience worse outcomes in homeless and housing programs than non-Hispanic white households. This is a high-level review, and the County commits to increased analysis and strategy development as the plan moves towards full implementation.

The racial disparity analysis below uses American Community Survey census data and Homeless Management Information System (HMIS) data to highlight “over-” or “under-” representation by race/ethnicity for both Populations A (n = 621) and B (n = 1,817) (here “n” means the total number of individuals in each of these categories from which the subsequent statistical findings were drawn). The Clackamas County data show the percentages of each race in the general population, and the percentage of the population served in priority populations A and B. If the percentage of people by race in the homeless system was the same as their percentage in the overall County population, there would be no green bars on the graph. If the percentage of a population by race was found to be higher or lower in the homeless system data than in the general population, that is represented in the graph as green bars (light green for Population A, dark green for Population B) showing the *percentage difference*. For example, people who identify as Black/African American make up 1.2% of the population of Clackamas County but make up 4.7% of Population A in the homeless system data. This overrepresentation is expressed in the graph by the percentage difference between the two numbers (a 119%

difference in this case), shown in the light green bar. The graph below shows that the most significant overrepresentations for both service populations are in the populations of: Native Hawaiian, Pacific Islander (163% for Population A and 133% for Population B); Black, African American (119% for Population A and 137% for Population B); and Native American, American Indian, Alaska Native (37% for Population A and 151% for Population B). The most significant underrepresentation for both service populations was found among Asian community members.



*BIPOC = Black, Indigenous, and People of Color.

A caveat to this information - there may be fewer Latino/a/x and immigrant households accessing services due to both real and perceived barriers, including [the Public Charge rule](#), which states, “an alien who is likely at any time to become a public charge is generally inadmissible to the United States and ineligible to become a lawful permanent resident. Under the final rule, a public charge is defined as an alien who has received one or more public benefits, as defined in the rule, for more than 12 months within any 36-month period.”¹⁰ The need to seek public benefits and the harmful affect that assistance might have on immigration status may be the cause of reluctance and mistrust of the current system, even for households who are eligible for services, which could partially explain the underrepresentation of

¹⁰ <https://www.uscis.gov/news/public-charge-fact-sheet>

Latino/a/x populations in this data. In addition, the significant underrepresentation of Asian populations in both of the service population categories seems to indicate that Asian community members experience homelessness at far lower rates than people of other races and ethnicities do. However, this may also indicate insufficient or ineffective outreach by the homeless services system to Asian communities, as well as mistrust and barriers within Asian immigrant and refugee communities due to the Public Charge rule.

Clackamas County staff and our consultants also provided qualitative information to inform barriers to access. During focus groups and community engagements, participants gave responses to three questions: What are the biggest gaps in homeless services in Clackamas County? What are the main gaps or barriers for Communities of Color? and What would you argue should be priority investments? The top five themes in response to the question regarding barriers for Communities of Color were:

1. A lack of culturally specific services and information
2. Mistrust of government systems
3. Unsafe and unwelcoming community
4. Disproportionate issues with rental screening barriers
5. Barriers in accessing services

Additional barriers and specific details regarding the content of each theme are included in the SHS Engagement reports on Barriers for Communities of Color (see Appendices G and H). HACC is committed to ongoing analysis of these disparities, engagement with Communities of Color, and the continued development of strategies to overcome these barriers and racial disparities in the homeless response system. HACC is committed to the adoption of several initial strategies that can be employed immediately to address some of these barriers, as mentioned in the community engagement outreach summaries (see Appendices G and H), such as focusing services on specific populations, improving both infrastructure and services to appropriately serve specific racial and cultural groups, and increasing advocacy and policy work, in addition to the specific strategies outlined below.

Strategies to advance racial equity

After careful consideration of the findings within the engagement reports and Committee recommendations, HACC commits to the following strategies to advance racial equity within the SHS program:

Housing: The SHS program will maintain a commitment to Housing First and housing choice, as well as create project-based and scattered-site Permanent Supportive Housing preference policies to address the overrepresentation of specific Communities of Color. Establishing data-driven investment priorities will be key to eliminating racial disparities in programs and outcome measurement.

Supportive Services: Considering the lack of culturally specific organizations and support services within Clackamas County, the SHS program will prioritize funding investments to

culturally specific providers. These investments will expand culturally specific and responsive housing-based services, including behavioral health (mental health and addiction recovery services) and employment services, to Communities of Color, and Immigrant and Refugee communities, and other historically underserved populations, including youth and LGBTQIA2S+ communities, and help to build the capacity of existing culturally specific community networks.

Access Coordination: To improve access to housing and services, Clackamas County will work to build trust between people with lived experience of homelessness, especially those who hold highly impacted racial and cultural identities. Additionally, HACC commits to improved outreach that is well staffed, utilizes technology, and is connected with culturally specific community leaders, people with lived experience, and service and housing organizations.

Capacity Building: To build capacity for robust services in Clackamas County, the SHS program will increase financial support and technical assistance for existing and emerging culturally specific organizations to ensure all Community Based Organizations (CBO) have the resources they need to pay staff living wages, provide good benefits, and support strong programming. Additionally, the SHS program will ensure all agencies have the resources and time needed to train all staff to be culturally responsive.

Clackamas County is committed to advancing the racial equity strategies outlined in this Plan, prioritizing allocations and continually being informed by the experiences and perspectives of those who hold highly impacted racial and cultural identities, including those with lived experience of homelessness.

System Needs Analysis & Investment Gaps

Regional Analysis

The following analysis provides an estimation of the number of people in each of the two SHS eligibility groups¹¹ who are experiencing homelessness across the Tri-County region, and the scope of need that will be addressed in Clackamas County. The analysis highlights homeless system gaps in access to, and outcomes of, housing and services by program type, which leave unmet needs for the many households experiencing homelessness, especially Communities of Color. The analysis also includes gaps in infrastructure and alignment, including capacity, partnerships and coordination. This analysis is informed by:

- Regional data and local data showing the scope of unmet needs of SHS priority households
- Regional and local data on Current System Investments by housing program type

¹¹SHS eligibility groups, sometimes referred to herein as Populations A and B, are: “Priority population A”, defined as extremely low-income, having one or more disabling conditions, and experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness; and “Priority population B”, experiencing homelessness or having a substantial risk of experiencing homelessness.

Population scope: Number of households

As previously noted, at least **24,260** households experienced homelessness across the Tri-County region over the course of 2017. **4,935** of those households were extremely low-income, had at least one disabling condition and experienced long-term literal homelessness. People in this eligibility group most often need intensive interventions like supportive housing. The remaining **19,324** households are experiencing homelessness more broadly, and in most cases, may not need the intensity of supportive housing, but will likely need rent assistance and less intensive supportive services. Here is the breakdown of these figures by household type derived from the 2019 report, *Governance, Costs, and Revenue Raising to Address and Prevent Homelessness in the Portland Tri-County Region* released by Portland State University’s Homelessness Research & Action Collaborative.

Regional homeless population by household type

Household Type	Percentage (Number) of Individuals (regional)	Percentage (Number) of Families (regional)
Extremely low-income households with one or more disabling conditions experiencing/at imminent risk of experiencing long-term literal homelessness	90% (4,452)	10% (483)
Households experiencing/at substantial risk of experiencing homelessness	54% (10,471)	46% (8,853)

Proportionate size and scope in Clackamas County

Clackamas County’s general population represents approximately 21.3% of households across the Tri-County region.¹² However, for many reasons, the County’s homeless system of care serves a smaller proportion of households experiencing homelessness due to an historical lack of existing services and providers.

Sharing responsibilities in meeting the needs of homeless and at-risk households will require significant expansions of the homeless systems of care in both Clackamas and Washington counties to meet the needs of a larger number of households than currently present in their local data. For Clackamas County, this means addressing the needs of a more equitable proportion of households.

¹² U.S Census Bureau, Population Estimates Program [PEP]. (July 2019). “Population Estimates, July 1, 2019 (V2019).” *Multnomah County, Oregon*. Retrieved from: <https://www.census.gov/quickfacts/fact/table/multnomahcountyvoregon#>

Numerical needs analysis

The following analysis estimates the unmet need for various service types and interventions within each SHS target population in Clackamas County. The model used to determine the needs for Populations A and B assumes that there is a need for housing-based interventions in systems outside of the traditional homeless service system. We used known local data from a variety of systems, along with national research and similar analyses from other communities, to develop the estimate of need in Clackamas County.

While people may have contact with multiple systems over the course of the year, this model uses Point in Time (PIT) or PIT equivalent data to minimize duplication errors while calculating total need. This data is applied in combination with descriptive data (e.g., disability rates, housing status, behavioral or mental health needs, etc.) and Homeless Management Information System (HMIS) annualized data to distribute households with housing needs between Populations A and B.

Several additional data sources (beyond PIT and HMIS data cited above) were used to determine projected needs, including: local Jail data; Child Welfare System data from Department of Human Services (DHS Clackamas County information); and Education System data from K-12 – McKinney-Vento liaisons (DHS). This needs analysis was conducted by the Corporation for Supportive Housing (CSH).

Unmet needs and system gaps by program type

The amount of need for housing interventions in Clackamas County will depend upon the ability of all three counties to enhance and/or expand housing solutions within their homeless systems of care to meet their proportionate share of the need across the region. This will require ongoing close collaboration with the other two counties to closely monitor local and regional needs for each type of housing program and adjust proportions accordingly when needed. The analysis on the following pages describes high-level unmet housing-related needs by program type. It should be noted that some housing-related needs specific to Communities of Color were highlighted above, so those insights will not be repeated below.

Households experiencing or at substantial risk of experiencing homelessness require an array of flexible rent assistance and tenant-centered supportive services, such as mental health or substance abuse services, to meet their short and long-term housing needs. Some households will need only one-time resources to prevent homelessness, some will only need rent assistance, others will need long-term rent assistance and long-term intensive supportive services, and many will find that their needs for housing resources change over time.

Unmet needs by service type – Clackamas County

Projected totals	Population A	Population B
Count	997	2209
Supportive Housing	997	208
Long Term Rent Assistance	997	1104
Short Term Rent Assistance*	--	1104
Eviction Prevention*	--	913
Housing Placement	934	1087
Crisis Response—Emergency Shelter	698	602
Crisis Response—Transitional Housing	299	602

**This assumes that Short Term Rent Assistance will not be needed for Population A due to Long Term Rent Assistance assigned to each unit created or in pipeline. Eviction Prevention activities are part of services with Supportive Housing for stabilization and retention.*

As part of the implementation of the SHS Program, Clackamas County will work regionally to ensure there is an ongoing effort to gain a complete picture of the need for specific housing interventions.

Investment Plan

Overarching program commitments

As mentioned above, this Plan identifies and outlines the unmet needs and investment priorities for rental assistance and supportive services programs within Clackamas County for the SHS program’s priority populations, with a focus on Communities of Color.

As required by Metro, Clackamas County commits to spend 75% of the SHS Program allocated to the County for Population A, defined as those who are:

- Extremely low-income *AND*
- Have one or more disabling conditions *AND*
- Are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness

The County also commits to spend 25% on best practices to reduce and prevent homelessness for those in Population B, defined as those who are:

- Experiencing homelessness *OR*
- Have a substantial risk of experiencing homelessness

As previously noted, Clackamas County is strongly committed to centering racial equity at every stage of SHS planning and program development and is working to identify and eliminate

barriers that prevent participation from Communities of Color in stakeholder engagements and in accessing services. This Plan is informed by the best-available data, which has been disaggregated by race, as well as by the rich stakeholder input gained through an inclusive community engagement process that centered the voices of Communities of Color, detailed earlier in this Plan document.

We commit to evaluate, locally and regionally, the needs of these two priority populations regularly (at least annually) as we implement the program. Clackamas County will work with Metro and regional partners to adjust priorities or distributions to better meet the needs of the SHS priority populations and the goals of the program.

All of the programs and housing resources contemplated in this Plan will be low-barrier and will include housing first strategies, and all evaluation documentation will also include self-reporting options to increase comprehensiveness, accuracy and participation. As HACC evaluates the results of data and qualitative information, the County agrees to adjust the distribution of resources between Populations A and B, within the County and regionally, to best respond to the evolving needs of the populations over time.

Current Investments

The public funding for services and housing that serve the homeless population across all three counties totals more than \$112 million, with Clackamas County dedicating \$8 million:

Public Funding	Multnomah	Washington	Clackamas	Total
Supportive Housing	\$38,628,151	\$5,769,658	\$4,239,884	\$48,637,693
Rapid Rehousing & Prevention	\$34,188,197	\$1,963,541	\$2,209,027	\$38,360,765
Emergency Shelter	\$17,041,310	\$3,016,174	\$1,337,805	\$21,395,289
Transitional Housing	\$1,333,565	\$2,045,234	\$232,726	\$3,611,525
Total	\$91,191,223	\$12,794,607	\$8,019,442	\$112,005,272

Clackamas County commits to maintaining these Federal, State and Local funding allocations and commits that the Supportive Housing Services Program funds will not replace existing resources, except in the case of a “good cause” waiver approved by Metro. Additional contemplated leverage for the SHS program resources is listed on page 24.

FY19/20 Public Funding Investments by Program Type, Clackamas County

The following table provides details the current investments in **Clackamas County**:

Program Type	FY19/20 Public Funding	# Households Served
Supportive Housing	\$4,239,884	261
Rapid Re-housing	\$2,209,027*	159
Prevention		141
Emergency Shelter	\$1,337,805	660**
Transitional Housing	\$232,726	17

*Rapid Re-housing and Prevention investments are combined in this analysis.

**Emergency Shelter households served includes temporary winter shelter.

Note: This chart does not reflect all funding sources used to serve the number of households by program type.

Federal COVID-19 support

This Plan has been developed during the COVID-19 pandemic. We acknowledge and are grateful for significant federal funding provided to Clackamas County to help community members remain in their homes during this difficult time. It is important to recognize that the COVID-19 funds are critical to maintain the status quo, and prevent even more families and individuals, who are currently housed, from becoming homeless. The SHS program focuses primarily on “Population A,” a group that has experienced homelessness long before the COVID-19 pandemic and is not the primary target for the stabilization funds coming from the Federal Government. It is also important to recognize that these COVID-19 funds are “one time” funds and will run out within a year or two. Undoubtedly, more community members will struggle with housing stability after the pandemic has waned, and the SHS program and funds will be critical to help address this increased need in the future.

Planned Investments

This Plan provides a high-level strategic framework to guide funding priorities for SHS in the coming years. While Phase I priorities are committed to and detailed below, the majority of funding decisions will be made after additional in-depth planning over the coming year in partnership with community stakeholders. In all future planning work, we commit to prioritize the continued participation of Communities of Color and people with lived experience of homelessness, and will structure our engagements to enable their participation.

Metro originally projected annual revenues of over \$51 million for Clackamas County, but the short and long-term impacts of COVID-19, together with the anticipated lag in collection rates, will have unknown negative impacts on revenues for the first several years of the program. For purposes of planning, Metro has advised that we should estimate Year 1 revenues at **\$24.5** million for Clackamas County.

The framework for investments provided in this section is derived from:

- The requirements set out in the SHS Measure
- The guiding values, objectives, and racial equity and gaps analyses detailed above
- The Committee
- Extensive community feedback regarding what is needed to meet those objectives and address those gaps
- System capacity in Year 1

Phase I investments reflect the more specific known needs and commitments that are either of limited duration or provide a necessary foundation for the long-term expansion of the homeless system of care under the SHS Program. While Phase I investments are priorities for years 1 - 3, the investment strategy for years 2 and 3 will come after additional local and regional planning following approval of this plan.

Systemwide investment priorities

Certain investments will be needed early and on an ongoing basis to support the effective implementation of the SHS Program. Many of the Phase I investment priorities are in this category. Some of these investments are likely to be made regionally in coordination with Washington and Multnomah Counties.

(1) Building Community Based Organization (CBO) Capacity: The success of the SHS Program will depend on the ability of CBOs, in particular those offering culturally specific services, to effectively deliver the support services funded by the Measure. Both established and emerging organizations will be needed to support implementation of the SHS Program across all three counties. Therefore, there will be a significant priority placed on building the capacity of CBOs through technical assistance, training (including training to frontline staff), and infrastructure development. Specific strategies will be co-created with stakeholders to encourage and facilitate new CBOs contracting for SHS funds with the County. Following an evaluation, there will likely also be a significant investment in current organizational capacity to address pay equity concerns, help stabilize staffing, and enhance outcomes. CBO capacity will be a shared priority of all three counties, and investments will likely be made on a regional basis.

(2) Evaluating the System and Program: As part of developing more detailed investment priorities and system expansion strategies for the SHS Program, there is a need to evaluate aspects of our existing homeless response, behavioral health, aging and other aligned systems and program strategies. Ongoing system and program evaluation investments are essential to ensuring continuous quality improvement throughout the life of the program. Immediate evaluation priorities include assessing the capacity of CBOs that currently deliver services, including a review of their ability to attract and retain talent given current compensation levels and approaches to equity. Evaluation is an area where investments will likely be made regionally as well as locally. All system and program evaluation work will be carried out using a racial equity lens and with leadership from Communities of Color, immigrants and refugees, and people with lived experience of homelessness.

- (3) Collecting and Sharing Data:** There is a substantial need to strengthen and integrate existing data systems, in particular the HMIS database and healthcare data systems, to expand users and develop new service coordination, tracking and reporting capabilities. Community stakeholders uplifted the difficulty in data collection compliance, particularly as many community-based organizations don't have dedicated data staff. In terms of improving service coordination, particularly across departments within Clackamas County, we anticipate investing in existing initiatives that focus on connecting together disparate data regarding client and service access. Establishing and implementing regional data collection and reporting standards will be a necessary area of work and investment, especially in the early phase of the SHS Program.
- (4) Navigating the system and Coordinating Access:** Improving access to information and the mapping of available services was identified as a high priority through community engagement. In addition, enhanced system navigation services that are delivered in partnership with culturally specific providers is a priority need, in particular for Communities of Color and immigrants and refugees. Bringing information and navigation services through outreach to people exiting institutional settings, staying in shelters, and living unsheltered is an added component to this. Additionally, improving coordinated access systems in order to ensure equitable access to housing and support services was identified as a high priority, as was ensuring that those who are highly vulnerable and have been awaiting housing on the current coordinated access waitlists, sometimes for years, not lose their place in line as the system is improved. We will also work with our regional partners to ensure that all access systems and information are available in multiple languages to remove barriers and improve participation.
- (5) County Program Implementation Capacity:** The SHS Measure will more than sextuple Clackamas County's current homeless services resources when revenue reaches the projected total. It will also likely expand critical services offered by other County departments, including the Public Health and Behavioral Health Divisions. While it is anticipated that the majority of funded services will be delivered by community partners, additional County staffing will be needed to effectively plan, procure, implement, and evaluate the SHS Program.

Clackamas County SHS Priority Program Investments - Phase I

To meet the unmet need identified above, HACC developed the following investment priorities based on the needs and findings identified through extensive community engagement, contemplation of several data sets, and through several discussions between HACC and Clackamas County staff and members of the Committee. These priorities also consider current staff and community capacity and the new funding available.

- **Increase emergency shelter capacity** to house people immediately. Focus on both acquisition/development and operations, as well as long-term lease opportunities Include wrap around services including behavioral health and placement services to transition people rapidly into permanent housing solutions with ongoing services

- **Expand and establish culturally specific services.** Invest in capacity building of organizations willing to expand to serve Clackamas County. Work in partnership with Multnomah and Washington Counties on regional expansion efforts. Potentially contract with a lead culturally specific organization that can assist other organizations and providers in capacity building efforts
- **Expand wrap around support services** for recipients of the regional long-term rent assistance program as well as to other rent assistance programs, Metro Bond and other affordable housing projects, and existing housing units to provide housing stabilization. Couple supportive services with existing Housing Authority units where possible. Services may include but are not limited to behavioral health services, mental health services and addiction recovery in addition to case management. Additionally, HACC will prioritize a partnership with Clackamas County Behavioral Health Division to expand:
 - Outreach-based clinical and peer led behavioral health services
 - Shelter-based clinical and peer led behavioral health services
 - Expansion of both mental health and addiction recovery transitional housing
- **Increase all types of outreach and housing placement services** including ones specifically designed to be culturally responsive
- **Expand existing, high performing, contracted programs and services** primarily focused on serving population A. Expand existing, high performing, contracted programs and services that serve population B, including eviction prevention, as funding allows
- **Convert vouchers that are time-limited** into supportive housing services long term rent assistance or short-term rent programs for those who will need ongoing assistance as well as work to reduce wait lists for people needing rental assistance
- **Increase internal capacity** of Clackamas County SHS program by adding key staff and investments for program management, CHA, data systems and analysis, community engagement, and outreach. Work to increase coordination of programs and services across County divisions and reduce CHA wait times
- **Allocate funds for outreach.** In addition to the services detailed above, Clackamas County calls out “Outreach” as a specific and separate approach. Many people may not trust organizations or systems that provide the listed interventions and would benefit from outreach and engagement that meets people where they are using trauma informed care and other best practices such as motivational interviewing and stages of change approaches that are culturally and linguistically responsive. Because it often requires substantial effort to engage people in any type of assistance, HACC will conduct this ongoing outreach activity concurrently with other services and interventions

First phase housing and service goals

HACC is currently undergoing their yearly budget process. The following projections reflect the most accurate estimates possible at this time, and are subject to change during the finalization of the budget. The final budget will be approved in June 2021, before funding begins for fiscal year July 1, 2021- June 30, 2022.

Clackamas County is projected to receive \$24.5M in revenues for year one. From the 24.5M, 5% is to be set aside for regional planning efforts, as prescribed by the measure. \$2.7M is also set aside to assist Community Based Organizations build capacity for this new program including culturally specific organizations as well as to the Supportive Housing Services program capacity.

The following housing and services goals are based on estimates and averages available at the time of Plan development. Some costs per category may be higher and some may be lower, depending on costs of units (development vs. scattered site), costs of services (based on acuity of client/tenant) and other factors

The first phase goals will be updated following discussions with other counties to ensure that Clackamas County contributes to meeting the full needs of the Tri-County region, as well as meeting the unique needs of Clackamas County. Revenue changes and other factors (e.g., agreement on wage equity across the region) may affect these numbers as well. As can be seen in the tables below, Clackamas County will be making significant year-one investments in long-term rent assistance. Clackamas County commits to a regional approach in administering the Regional Long-Term Rent Assistance program and will use the regional policy framework developed in partnership with Multnomah and Washington Counties to ensure one consistent program for service providers, landlords and tenants (Appendix K).

Clackamas County Allocation Year 1	Amount
Housing & Services for Population A & B (79%)	\$19.3M
Capacity Building for CBOs/Program Operations (11%)	\$2.7M
Administrative (5%)	\$1.25M
Regional Projects/Efforts (5%)	\$1.25M
Total	\$24.5M

Population A & B Split of Housing & Services Allotment \$17.2M	Amount	Split
Population A - Housing and Services	\$14.6M	75.6%
Population B – Housing and Services	\$4.7M	24.4%

Year 1 Goals & Projected Investments	Population A Goals	Investments Population A (75.6%)	Population B Goals	Investments Population B (24.4%)
Supportive Housing Services (Households)	200	2.4M	--	--
Long-term Rent Assistance (Units)	200	3.6M	50	.600M
Short-term Rent Assistance (Households)*	--	--	130	1.276M
Eviction Prevention (Households)*	--	--	110	.632M
Housing Placement (Households)	125	1.475M	75	.499M
Emergency Housing -Shelter/Transitional (Units)	52	1.664M	13	.416M
Shelter Acquisition/Lease (Units)	--	2.8M	--	.700M
Outreach (Households)	400	1M	100	.210M
Housing Retention (Households)	75%	--	75%	--
Administrative Costs for CBOs	--	1.67M	--	.412M
Totals		14.6		4.7M

**This assumes that Short-term Rent Assistance will not be needed for Population A due to Long-term Rent Assistance assigned to each unit created or in pipeline. Additionally, Eviction Prevention services are part of services with Supportive Housing for stabilization and retention.*

Commitment to leverage funds for greater impact

Clackamas County will leverage SHS Program resources with other funding efforts such as the Regional Supportive Housing Impact Fund (RSHIF), an effort led by Health Share of Oregon to address the need of people who need supportive housing and other interventions to break the cycle of moving in and out of institutional and acute care settings. Currently, Kaiser Permanent is funding the Metro 300 project via RSHIF, which provides rent assistance and services for people over the age of 50 with disabling conditions, particularly behavioral health. Clackamas County is participating in this effort and has housed 65 individuals (of a total goal of 80 people) as of January 2021. The County intends to use SHS program funds to ensure these program participants receive long-term rent assistance and services.

In addition, CSH is conducting a statewide Medicaid Crosswalk that will analyze what Medicaid can and cannot cover for Supportive Housing services. The intention of this crosswalk is to determine if other services can be covered by Medicaid through a waiver, how to make it easier for agencies that are able to bill Medicaid to pair those resources with Supportive Housing and make the case for flexible supportive service resources for housing and homeless programs. Once complete, this analysis and report will provide additional leverage opportunities which we will include in our overall service strategy.

Commitment to promote geographic equity

Clackamas County commits to an equitable geographic distribution of services through the following strategies, detailed below: Coordinated outreach; a commitment to housing choice;

prioritizing access to shelter services for people experiencing homelessness in the community in which shelter is sited; and expanded access through technology to coordinated entry and application materials. In addition, Clackamas County is engaged in a planning effort to identify existing public funding resources for homeless services that can be prioritized to the rural, non-Metro areas of the County.

Coordinated outreach: Clackamas County currently has limited capacity to conduct street outreach. Throughout the SHS implementation we are committed to a significant expansion of street outreach to all parts of the Metro region of the county. This expansion will enable Clackamas County to distribute connection to services via outreach to all of the Metro areas of the county, regardless of the ability of people experiencing homelessness to access day centers or coordinated entry by phone. This enhanced outreach will include a significant emphasis on culturally responsive tactics to ensure broad and inclusive connections and participation.

Housing choice: Through our commitment to housing choice, recipients of rent assistance will be able to choose to make their homes in any community within the Metro jurisdiction. SHS Program funds will be leveraged to support Metro Bond funded development projects coming online in the next one to two years, increasing the Permanent Supportive Housing units in those projects. These developments are geographically dispersed and are sited in Gladstone, Happy Valley, Milwaukie and Oregon City, with pending development projects in Lake Oswego and Unincorporated Clackamas County.

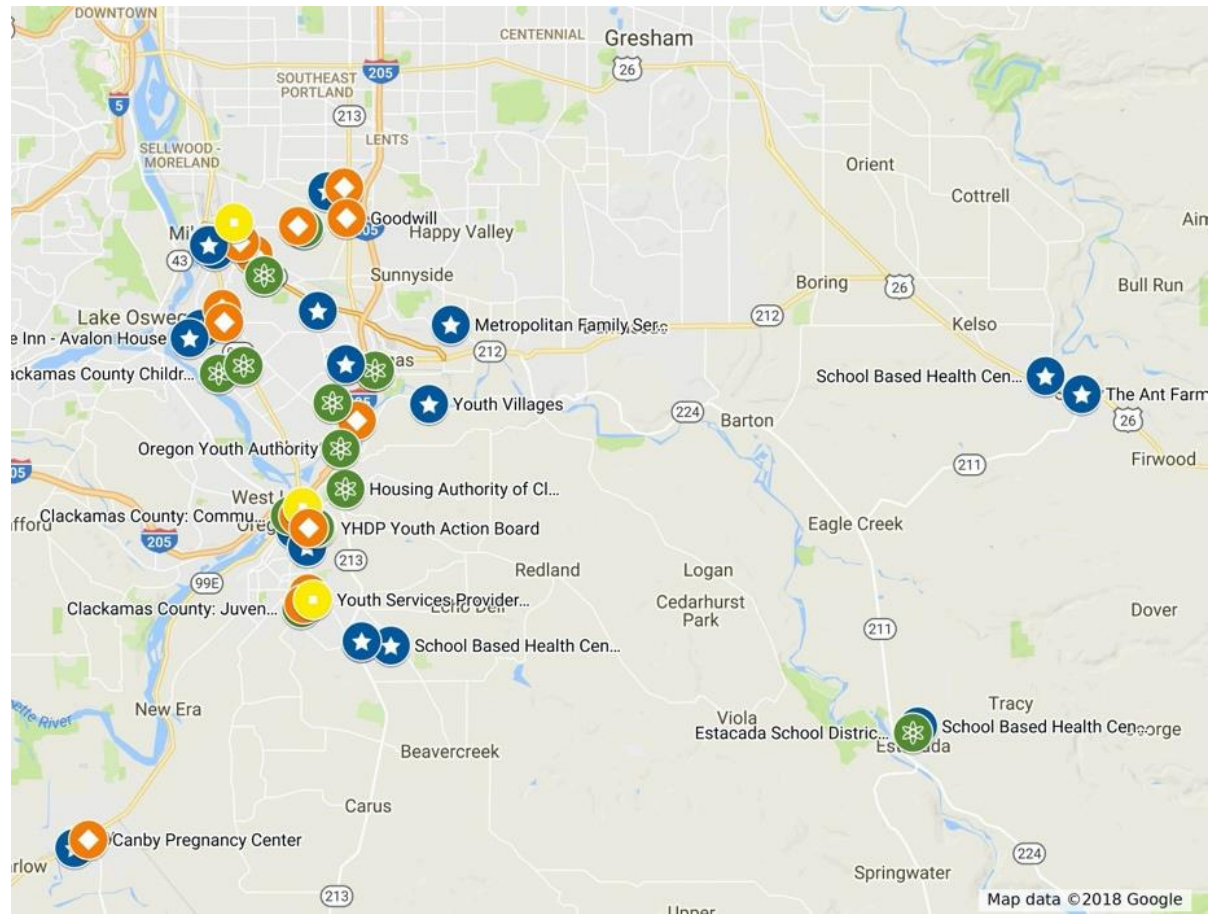
Access to shelter: Clackamas County lacks adequate emergency housing resources. As we site new emergency housing resources in the Metro region of the county, we are committed to prioritizing access to those resources for people who are experiencing homelessness in the community in which these resources are sited.

Coordinated entry: Clackamas County, in partnership with the Coalition of Communities of Color, is undertaking a racial equity analysis of our coordinated entry system and we are committed to improving the accessibility of the homeless services system to all people in our community. This will include the expansion of technology options for accessing coordinated entry as well as the conversion to digitally fillable forms for new programs requiring client paperwork.

A county wide effort: The Supportive Housing Services program will bring significant new resources to the Metro areas of Clackamas County. More than half of Clackamas County sits outside the Metro boundaries, however, and housing and homeless services needs remain acute in these more rural parts of the county. As part of the planning and implementation work for the Supportive Housing Services measure, Clackamas County is conducting an analysis of need in the rural areas and of current funding sources that can be prioritized to the non-Metro areas of the county. The Coalition of Communities of Color and Unite Oregon are partnering with HACC to conduct community engagement in the rural areas through the first third of 2021, to enable HACC to better understand the needs of Communities of Color in rural Clackamas County. Internally HACC and H3S are working to identify federal, state, and local public funding

sources for housing and homeless services that can be redirected or otherwise prioritized to serve the needs of non-Metro Clackamas County communities.

Map of the geographic placement of existing services



Members of the Committee noted that there are significant services deserts in parts of the County for homelessness and housing services, as is evident on the map. Areas exist outside of the Metro boundary that do not currently have services available and there are also organizations that serve the entire County that are not accounted for on the services map.

Commitment to coordinate access

Clackamas County commits to a regional response for people experiencing homelessness. The County commits to working with Multnomah and Washington Counties, as well as the future tri-county advisory body, toward the development and implementation of a regional coordinated entry system, which will build on the existing work of the SHS tri-county data governance work group in which HACC is a fully-engaged partner. Individuals and families living in Clackamas County sometimes seek services or are placed in treatment locations in another county, while at the same time; people who are seeking housing may find more available and affordable options in Clackamas County. Clackamas County also commits to making any documentation required for determining program eligibility low-barrier and with self-reporting options.

The data in Chart 2 demonstrates that a greater percentage of people experiencing homelessness in Clackamas and Washington Counties sought services and/or housing in other counties (at 18 and 17%, respectively). However, a larger number of people (almost 1,300) who sought resources in Multnomah County also looked for services and/or housing in other counties.

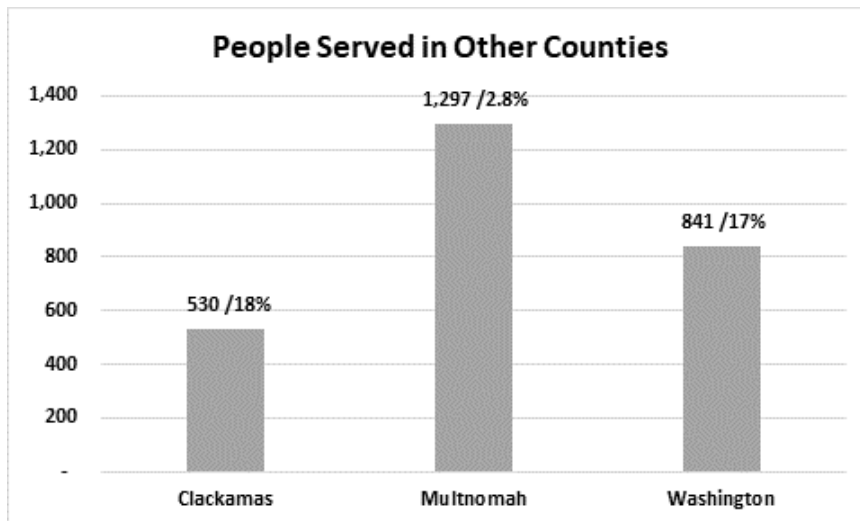


Chart 2: from HMIS data as reported in the “Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness, February 2019. Available [here](#).

Additionally, and not surprisingly, needed service components differ by population as well as households. The Committee recommends that all services offered, regardless of location, should be person-centered and trauma-informed. Providers should actively work to eliminate the re-traumatization of individuals by improving communication, understanding various perspectives, and adapting the system to effectively engage and reach populations not currently reached, across the entire region.

The Committee identified **access** and **coordination**, both within Clackamas County and across the region, as a priority, and identified several priorities that illustrate the need for greater coordination across the region such as:

- Expanding access through Clackamas County’s Coordinated Housing Access (CHA) system
- Building trust between people experiencing homelessness and the housing system
- Making services culturally and linguistically responsive
- Removing barriers and increasing coordination with existing culturally specific providers

Commitment to inclusive decision making

This Plan represents high-level strategies for investments, and to further inform *specific investments* and the design of SHS programs, we will continue to engage stakeholders, with an emphasis on Communities of Color, to ensure investments and programs are responsive to the community’s needs.

An inclusive decision-making body is crucial to designing an equitable system and meeting the needs of people who have been historically underserved. To ensure inclusive decision making going forward, Clackamas County will engage its Continuum of Care Steering Committee (CoCSC), with an expanded focus, to provide the necessary local oversight and guidance for SHS implementation. The charter of this expanded body will require overrepresentation of Black, Indigenous, and People of Color in its membership. This group, which currently meets bi-monthly, will now meet monthly to accommodate its expanded role and responsibilities.

The CoCSC membership is currently made up of:

- Two Health, Housing, and Human Services (H3S) appointee seats
- Two Youth Action Board (YAB) member seats
- Two seats for people with lived, recent experience of literal homelessness
- Two Continuum of Care program representatives; and three at-large seats

The YAB and lived experience seats are paid positions. As the CoCSC is expanded to provide SHS oversight and guidance, this membership may shift or change. By consciously designating the seats for this committee in this way, we are able to ensure a representative and equitable decision-making body.

Commitment to enhance the capacity of community partners

The Housing Authority of Clackamas County (HACC), through the SHS Program, will expand its network of providers that deliver supportive housing services, and procurement solicitations will target smaller organizations and non-traditional partners, with an emphasis on culturally specific organizations. The SHS Program will allow HACC to expand services and focus procurement to include additional service providers not previously serving Clackamas County. Through targeted community outreach, culturally specific service providers have been identified and will be strongly encouraged to apply for funding.

We recognize that to effectively deliver services at the levels required, many organizations will require assistance with capacity building. These capacity building needs may include, for example, funds to establish a variety of communication channels, funding to establish new organizations or new offices, support to prepare for programs or services, and/or staff support dedicated to preparing competitive funding applications.

HACC will work toward a procurement process that meets the SHS goals, such as: a commitment to Housing First and other best practices; the requirement of diversity within organizational staffing; and the requirement of providers to deliver services in a culturally specific and/or responsive manner. We will prioritize funding to organizations that align with workforce equity standards: establishing equitable rates of pay; including employment practices that promote trust, safety and belonging; providing equitable opportunities for advancement; and providing training that develops foundational knowledge on race and equity. HACC will also work to leverage partnerships with the County's public workforce system, WorkSource Clackamas, to build and expand employment opportunities both for CBO partners and the populations that they serve.

Commitment to improve behavioral health services alignment with housing and homelessness programs

Behavioral health and peer support services are critical to meeting the housing needs of people experience homelessness or at risk of homelessness. Across our community engagements, a lack of behavioral health services was the number one most common response from participants when asked about gaps in Clackamas County's homeless services system of care. Enhancement and alignment of behavioral health programs with homelessness and housing services will be a critical investment approach in Clackamas County's SHS programs. HACC will consider and invest in strategies that bring flexible, client-centered behavioral health services to housing and homeless services programs, especially with the skills and expertise of peer recovery specialists and culturally specific services. Community-based behavioral health connectors and peer supports will work with housing navigators, shelters providers, and resident services staff to coordinate housing plans and health care supports. These workers will connect people to the mental health care and addiction treatment or recovery services suited to their needs and responsive to their desire for service.

Behavioral health and peer support programs funded through the SHS program are intended to enhance the behavioral health system of care, not replace existing levels of service or supplant funding for existing services. These investments will create alternative methods of service delivery focused on serving people experiencing housing instability and homelessness, and bringing behavioral health services into the community, shelters, and housing programs to support health, well-being and housing stability over time. The expansion of federal and state behavioral health investments is still critical to meet the needs of people with mental health conditions and addictions. SHS community-based behavioral health programs will often need to refer people to existing behavioral health services for adequate care.

Outcomes and evaluation

Evaluating outcomes that result from the SHS program is critical to ensure that people are receiving the best interventions for their housing and service needs, as well as documenting efforts to implement systems change locally and across the Tri-County region. HACC will track and report on all agreed upon regional metrics and any additional local metrics at least annually. All outcome reports will disaggregate each metric using inclusive racial and ethnic identity categories. As part of Phase I implementation, Clackamas County will work with Washington and Multnomah Counties to align race and ethnicity reporting categories and practices to ensure consistent regional reporting. In addition, Clackamas County will work with regional partners to use data visualization tools in order to make outcome data easily, and publicly, accessible. When feasible, the metrics will also be disaggregated by age, gender identity, household type, disabling condition, and other key demographic characteristics.

To demonstrate progress and identify challenges in implementing the SHS program, Clackamas County recommends that the three counties invest in a third-party evaluator and/or Metro conduct a regional evaluation, particularly near the end of Phase 3. The results from an evaluation of outcomes will assist Clackamas County and its partners to engage in Continuous

Quality Improvement (CQI) activities. While the exact process of evaluation is yet to be determined, we recommend the measures include (but are not limited to):

- Evaluation from all levels (front line staff to executive to Board level)
- Inclusion of partners in systems and program work
- Measurement across multiple systems that touch homelessness (e.g. behavioral health, housing, homeless response, etc.)
- Engagement from Communities of Color and people with lived experience

Regional Outcomes and Metrics

To date, Metro has adopted regional metrics in three primary areas: (1) Housing Stability; (2) Equitable Service Delivery; and (3) Engagement and Decision Making.¹³ Housing stability metrics include the number of additional supportive housing units put in service, the ratio of units to need, and some metrics that are consistent with HUD system performance metrics that HACC and the CoC currently collect and report on. To ensure that all required information is captured, some measures will be added or enhanced. The Equitable Service Delivery and Engagement and Decision Making metrics will require collaborative work with regional partners, Communities of Color, and service providers to operationalize.

Clackamas County commits to tracking and reporting on regional metrics and outcomes (as documented in Metro’s Required Elements Addendum (Appendix E), and any additional local metrics that may result after initial implementation of the Plan. The County also commits to providing disaggregate data by race where possible and will seek to develop this practice in any instance where disaggregate data are not available. Whenever possible, metrics will also be disaggregated by age, gender identity, household type, disabling condition and other key characteristics.

Clackamas County will also track and report on any additional measures identified through the ongoing evaluation process and community engagement activities, especially for measures related to equity. The County, to be accountable to the region, will also track measurements on increased systems work across the region, including improving data quality, simplifying and creating consistency across coordinated entry systems, and others as identified through regional coordination.

Clackamas County Specific Annual Outcomes

Each year, HACC will engage with stakeholders to set annual outcome goals in alignment with the established regional performance metrics, and any local metrics that are adopted. Because system performance projections will depend not just on available SHS funds, but also on other critical funding streams that are braided with the Metro funds (e.g. federal and state homeless assistance funding, local general funds, and housing development capital), it will not be possible to set specific numeric SHS Program goals independently. Clackamas County outcome goals will also depend on the capacity that emerges in other parts of the region.

¹³ See Appendix E: Metro Supportive Housing Services Outcomes Metrics for additional details.

Goals to Decrease Racial Disparities

In an effort to acknowledge and address the barriers experienced by Communities of Color, and to begin addressing the disproportionate outcomes within the homeless service system, Clackamas County commits to decreasing racial disparities among people experiencing homelessness, and will address specific and measurable goals that include:

- Increasing access for Communities of Color to housing and services, particularly for those with disproportionately high rates of homelessness
- Achieving positive housing and service outcomes for Communities of Color to be equal to or better than Non-Hispanic white household outcomes
- Growing culturally and linguistic program capacity as demonstrated through increased investments in culturally responsive and specific organization and programs
- Developing a plan for evaluating investment, program, and systems at least every three years

To track other goals, Clackamas County also agrees to analyze “Measurable Goals” as described in Metro’s addendum to its required elements (Appendix D) for Housing Stability, Equitable Service Delivery and Engagement and Decision-Making. These measures are clearly centered in racial equity and addressing disproportionality in access, utilization and outcomes for Communities of Color.

Evaluation of SHS Program

Working with our partners within and outside of Clackamas County, we will develop evaluation criteria during Phase 1 of the SHS Program. This phase of implementation includes building the data collection, reporting and evaluation capacity of CBOs, the County, and the region.

With additional capacity in Year 1, HACC will engage CBOs and regional partners in Second Phase planning to develop and implement the data collection and reporting requirements for the SHS Program. HACC will solicit stakeholders regarding data collection and reporting specifics and will collaboratively design standards for the SHS Program that meet Metro requirements once those requirements have been established.

Also beginning in Year 1, HACC staff will work with Metro, Multnomah and Washington counties to develop an evaluation framework and plan for the SHS Program. In addition to annual reporting on the regional and any local metrics, the evaluation plan will lay out priority areas for study and continuous quality improvement, and a schedule for completing that work.

Community Inclusion in Evaluation

Community members, particularly Communities of Color, will be involved at each stage of the program evaluation process. HACC will engage stakeholders in a second phase of planning to provide input that will help inform the evaluation strategy that Metro will develop with the three counties. Once that framework has been established, HACC will again engage

stakeholders to develop evaluation methods, standards and strategies for SHS programs, which will be incorporated into services contracts. Stakeholders, including culturally specific providers, will help to define and operationalize the metrics for the Measure, and will be invited to identify and develop any additional metrics from established SHS Program goals.

To evaluate our design and implementation of the SHS Program, HACC, in collaboration with Washington and Multnomah counties, will engage professional evaluators who specialize in developing evaluation frameworks, tools, and implementation strategies using a racial equity lens. The process of drawing conclusions from any quantitative and qualitative data will involve both researchers with robust expertise in racial equity and community members with lived experience who can help interpret and draw conclusions from that data. We expect to create regular opportunities for community stakeholders to review program outcomes data. It will be especially important to include service providers and SHS Program participants in reviewing outcomes to better understand the context behind the data and offer solutions on where the program can improve.

Second Phase Planning

This plan reflects a First Phase of planning, including high-level strategies for investments of SHS funds but does not include the specific work plans for these investments. These details will be developed in collaboration with community stakeholders across multiple planning sessions for each investment strategy. In this phase we will include representatives from as many cities and towns within Clackamas County as possible, to ensure broad input and support. HACC will develop a structure that outlines the categories of and the full scope of work for years 2 - 3 of the program. Through multiple stakeholder meetings HACC will build workplans for priority investments collaboratively with stakeholders, and will engage especially with culturally-specific organizations, including smaller and emerging organizations, to support this work. The work of these groups will inform the specific programs that will be designed or expanded upon to meet the goals of this plan for Phase Two and beyond.

A large component of the above Second Phase planning work will include the development of internal HACC workflows and systems that the HACC coordinates. Rather than risk duplication with a stand-alone program, HACC will carefully determine the ways that SHS funds can bring opportunities for expansion, improvement and flexibility to more quickly and comprehensively connect people to permanent housing and provide the individualized supportive services and rent assistance needed to maintain it.

Conclusion

There is no question that homelessness, and all of the negative impacts associated with housing insecurity, have been on the rise for several years, both in the Metro region, and in Clackamas County in particular. Now, perhaps more than ever, individuals and families struggle to secure and maintain a safe place to sleep at night, and as the long-term effects of the COVID-19 pandemic emerge, these challenges will only increase. As demonstrated throughout this Plan, these negative impacts have hit Communities of Color particularly hard. The SHS program, and

its associated resources, could not come at a better time, and we are grateful to have expanded tools and funding to meet these challenges head on.

In the past, Clackamas County has dedicated approximately \$8 million annually to this challenge, and the SHS program will increase those resources with an additional \$51 million annually. This influx of new resources will truly be a “game changer” for the County and the families and individuals that struggle within our community. Additionally, these funds will enable Clackamas County to take a more assertive role in joining the effort to solve this problem regionally.

Because the challenges of homelessness and housing insecurity have hit Communities of Color particularly hard, as illustrated in detail within this Plan, Clackamas County is unwaveringly committed to centering racial equity within all of the strategies, investments, partnerships, and deployment of funds that emerge as this Plan is actualized.

Additionally, Clackamas County is committed to collaborating as a strong regional ally with our partners in Washington and Multnomah Counties. We know that by working in unison on this regional challenge, we have a significant opportunity to end homelessness, and the challenges associated with homelessness, Metro wide.

Over the next several months, Clackamas County will continue to develop strategies, goals and community partnerships to fully operationalize and execute the SHS Program. We look forward to working with our regional partners on these next steps and we are confident that together we will develop a comprehensive response that will serve our entire region and dramatically improve housing outcomes for all of Clackamas County.

Appendix A: Key Definitions

Disclaimer: This is only the beginning of a comprehensive set of definitions for this plan. HACCC will continue to add to this list based on feedback from Plan reviewers.

Coordinated Access Assessment Tools

Individuals and families that meet the eligibility requirements can complete a Coordinated Access assessment. A different assessment tool is used for each subpopulation. Many partner agencies have staff trained to conduct these assessment tools. The assessment information is used to support the evaluation of participant vulnerability and prioritization for assistance.

Coordinated Access System Subpopulation	Assessment Tool
Unaccompanied Youth System	Homeless Youth Continuum (HYC) Screening, includes the Transition Age Youth Triage Tool (TAY)
Survivors of Domestic Violence System	Safety and Stabilization Assessment (SSA)
Families with Minor Children System	Family-Vulnerability Index-Service Prioritization Decision Assistance Tool (F-VI-SPDAT)
Adults unaccompanied by Minor Children System	Vulnerability Index-Service Prioritization Decision Assistance Tool (VI-SPDAT)

Culturally-Responsive Services

Culturally-responsive services are respectful of, and relevant to, the beliefs, practices, culture and linguistic needs of diverse consumer/client populations and communities. That is, communities whose members identify as having particular cultural or linguistic affiliations by virtue of their place of birth, ancestry or ethnic origin, religion, preferred language or language spoken at home. Cultural responsiveness describes the capacity to respond to the issues of diverse communities. It thus requires knowledge and capacity at different levels of intervention: systemic, organizational, professional and individual.¹

Culturally-Specific Organizations

Culturally-specific organization include the following elements: 1) The majority of members and/or clients are from a particular community of color; 2) The organizational environment is culturally-focused and identified as such by members; 3) The staff, board and leadership reflects the community that is served; 4) The organization has a track record of successful community engagement and involvement with the community being served. Additionally, the community itself has validated the range of services provided by the organization and confirmed their usefulness to the community.²

¹ Curry-Stevens, A., Reyes, M.E. & Coalition of Communities of Color. (2014). Protocol for Culturally Responsive Organizations. Center to Advance Racial Equity, Portland State University.

² Ibid.

Disabling Condition

HUD defines a disability as having one or more of the following impairments: physical, mental or emotional impairment, including impairment caused by alcohol or drug abuse, post-traumatic stress disorder (PTSD), or a brain injury that is expected to be of long-continuing or indefinite duration and substantially impedes the person's ability to live independently. For the purpose of permanent supportive housing (PSH), verification of disability is not needed at the time of assessment, but is required before entry into a PSH program.

Document Readiness Support

Assists participants with collecting documents to demonstrate eligibility for housing programs. These documents include verification of chronic homelessness or homelessness, documentation of a disabling condition, and verification of income. Often, this process can entail scheduling and attending medical appointments, and/or meeting with case managers, social workers, or therapists, and may even require ordering a replacement birth certificate, applying for a state ID, or a social security card. Each can take weeks, if not months, based on scheduling availability and complexity of need.

Doubled-Up

Zapata et al. in their report *Governance, Costs, and Revenue Raising to Address and Prevent Homeless in the Portland Tri-County Region* define doubled up as, "families or individuals who live doubled up with friends or family members due to the loss of housing or economic hardship are considered homeless. Sometimes described as the hidden homeless, this population is not counted in Point-in-Time but is included Department of Education counts for unaccompanied youth or youth in families. Neither count includes doubled-up adult households. Doubled up can refer to a range of complex living arrangements." (Zapata et al., 2019, p. 14).

Emergency Shelter/Shelter (ES)

ES Provides individuals and families with a safe place to sleep. It is meant to be short in duration and offer connection to housing options. The level of services available depends on the model. ES may be structured as a mat on the floor of a community space, an individual unit in which a household resides for a limited period of time, a private room with shared community space in a building, or other models.

Extremely Low Income (ELI)

Households whose incomes are at or below 30% of the Median Family Income for their area. In 2020 the Portland-Vancouver-Hillsboro metropolitan area, a household size of one's 30% MFI is \$19,350. For a household size of four, 30% MFI is \$27,630. The median income for a family of four is \$92,100.³

Fair Housing

The Fair Housing Law passed in 1968, it prohibits discrimination in the sale, rental or financing of housing based on race, color, religion, national origin, sex, familial status, and disability. In Oregon, there are additional protected classes including marital status, source of income, sexual orientation, and domestic violence survivors. It is a civil rights law because it protects the rights of people based on protected classes.⁴

³ Portland Housing Bureau. (2020). Median Income Percentages 2020 (effective 4/1/2020). [City of Portland website]. Retrieved from: <https://www.portland.gov/sites/default/files/2020-04/2020-ami-rents-phb.pdf>

⁴ Fair Housing Council of Oregon. (2020). [Top 3 Things You Should Know About Fair Housing](http://fhco.org/index.php/news/blog-2/item/29-top-3-things-you-should-know-). [Fair Housing Council of Oregon website]. Retrieved from: <http://fhco.org/index.php/news/blog-2/item/29-top-3-things-you-should-know->

Health Stabilization Services

Health services are a central part of stabilization for households experiencing homelessness. These services include addiction and recovery treatment (detox, inpatient, intensive outpatient, and medicated assisted treatment), behavioral health treatment (hospitalization, involuntary commitment, sub-acute inpatient, transitional residential treatment, and on-going ACT or ICT case management). In addition, some people are experiencing complex medical conditions like cancer, brain injury, HIV/AIDS, or a terminal illness, which require intensive and on-going medical stabilization services up to hospice and end-of-life planning. At times, treatment will be delayed if there is no access to housing. Finally, for people discharging from a hospital with an acute medical condition (like a broken leg or an open wound) they may be eligible to stay in a recuperative care shelter. Most of these services have requirements, waitlists, and typically need a referral from a provider to start treatment (a person cannot self-refer into the program).

Homelessness

The U.S. Department of Housing and Urban Development (HUD) has defined four categories of homelessness: literally homeless, imminent risk of homelessness, homeless under other federal statutes, and fleeing/attempting to flee domestic violence. Our local definition of homelessness includes households who are “couch surfing” or doubled up with family or friends and lack housing permanence, a secure place to stay the next night or legal recourse if asked to leave.⁵

Housing Barriers

Barriers can include: no income or limited income; limited rental history; prior eviction; utility arrears; property damage debt; history of criminal charges. These barriers can be reasons why a rental application is denied.

Housing Discrimination

The Fair Housing Act protects households from discrimination when buying a home, renting, applying for a mortgage, seeking housing assistance. Additional protections apply to federally-assisted housing. Some examples of housing discrimination include when: securities deposits are only required for immigrants and refugees, or only required for people from Mexico; adult-use only building rules that prevent youth from going into certain common spaces; refusal to change property management rules to meet a reasonable accommodation such as sending notices to a payee; a renter is steered from living in certain neighborhoods to other neighborhoods where there are more people like the renter; a person from a Community of Color contacts a landlord over the phone and the conversation is positive but then in-person the landlord’s demeanor is different and the renter receives a denial.⁶

Imminent Risk of Homelessness

HUD defines imminent risk of homelessness as an individual or family who will imminently lose their primary residence, provided that: (i) residence will be lost within 14 days of the date of application for homeless assistance; (ii) no subsequent residence has been identified; and (iii) the individual or family lacks the resources or support networks needed to obtain other permanent housing.⁷

⁵ [AHFE Coordinated Access Guidelines](#), 2018, [HUD Criteria and Recordkeeping Requirements for Definition of Homelessness](#), 2012.

⁶ HUD.GOV. (n.d.). Housing Discrimination Under the Fair Housing Act. [HUD website]. Retrieved from: https://www.hud.gov/program_offices/fair_housing_equal_opp/fair_housing_act_overview

⁷ HUD. (2012). Criteria and Recordkeeping Requirements for Definition of Homelessness. HUD Exchange Website. Retrieved from: <https://www.hudexchange.info/resource/1974/criteria-and-recordkeeping-requirements-for-definition-of-homeless/>

Long-term Rental Assistance (LTRA)

Flexible rent assistance that is available to support those experiencing or at substantial risk of experiencing homelessness. LT rent assistance does not have an end date and can be available as long as the household needs it. It is also portable and moves with the tenant. Typically, these funds are limited to extremely low income households with incomes at 30% or less AMI.

Median Family Income

Zapata et al. in their report *Governance, Costs, and Revenue Raising to Address and Prevent Homeless in the Portland Tri-County Region* define median income “[m]edian income identifies the point where 50% of people make over that amount and 50% make less than that amount. Median income can be calculated for different groups of people such as different geographies, family size, household size, race, etc. [...] Determining who is described as low-income depends on what part of the income spectrum a family falls. If you make less than 80% MFI, you would be considered low- or moderate-income. HUD uses US Census Bureau data to calculate their own median incomes. Their definition is based on family income.” (Zapata et al., 2019, p. 14).

Permanent Supportive Housing (PSH)

PSH is permanent housing with supportive services to assist people that have a disability and have experienced homelessness to live independently. Supportive services must be offered for the duration of program participation. PSH may be at a single site, a scattered site or a clustered site, and can be integrated with affordable or market-rate units. Housing assistance can be project-based (tied to the unit) or tenant-based (tenant must locate a unit in the rental market).

Prevention (Eviction and Homeless Prevention)

Housing relocation and stabilization services and short-and/or medium-term rental assistance as necessary to prevent the individual or family from moving into homelessness.

Project Based Subsidy

Subsidy is attached to the building or unit and does not transfer with the tenant if and when they move. For project based section 8 public housing programs, entry into one of these units is from a waitlist. These waitlists typically open up one to three times a year.

Rapid Re-Housing (RRH)

RRH is designed to help currently homeless households achieve and maintain permanent housing stability as quickly as possible. RRH offers flexible funding, rental assistance and supportive services, and ranges from one-time financial assistance through a maximum of 24 months of rental assistance and/or supportive services. Our community values multiple approaches, including predetermined time frames for assistance as well as the Progressive Engagement model in which households receive the minimum assistance necessary to gain housing stability and frequent reassessment occurs to determine additional need.

Recovery-Oriented Transitional Housing (TH)

“Recovery housing is a housing model that uses substance use-specific services, peer support, and physical design features to support individuals and families on a particular path to recovery from addiction, typically emphasizing abstinence. The personal recovery journey is different for everyone, and some people who experience homelessness and who are pursuing recovery express a preference for a housing environment that is abstinence-focused and uses a peer-

driven community to support recovery” (HUD, 2015).⁸ All local HUD-funded Recovery-Oriented TH is short-term (from 4 to 24 months), site-based (meaning participants have units in the same building with services on-site), and alcohol and drug free. Participants receive case management with a focus on supporting recovery and achieving long-term housing stability.

Retention Services

Services provided to households after the end of a rental subsidy for up to 12-24 months. Services include ongoing visits, eviction prevention assistance, landlord and neighbor problem solving, and connection to community resources.

Scattered-Site Model

This model is typically used by non-profit organizations as a strategy to integrate housing units into the general community by purchasing or renting, or master leasing, condominiums, apartments, or single family homes as opposed to purchasing whole buildings and then placing all participants into one location.

Shelter Plus Care Program (S+C)

The former Shelter Plus Care program has been consolidated with other HUD competitive homelessness assistance grants programs to create the new Continuum of Care (CoC) Program.

Short-Term Rental Assistance

Flexible rent assistance meant to serve those at risk of or are recently homeless. Assistance duration is flexible, but does have a cap. 1 month - 2 years on average and is similar to rental assistance offered in Rapid Re-Housing and Prevention (though it is not limited by HUD requirements).

Supportive Housing (SH)

Supportive housing is a proven solution for highly vulnerable people who have complex health needs, including those with untreated or undertreated mental illness and addictions and have long-term homelessness in their background. It combines deeply affordable housing with supportive services to help people live with stability, autonomy and dignity. Our community operates two primary models of supportive housing: 1) Permanent supportive housing for populations with more complex needs and 2) Facility-based transitional housing for populations with shorter-term needs.

Tenant Based Rental Assistance (TBRA)

TBRA is a rental subsidy that is used to help individual households afford housing costs such as rent and security deposits. Under certain circumstances, it can be used to help with utility deposits. There are many types of TBRA programs. The most common type provides monthly assistance to cover the difference between the amount a household can afford to pay for housing and local rent standards, like the Section 8 Voucher Program. The HOME TBRA program is unique from other programs in that the TBRA assistance moves with the tenant and the level of the subsidy varies based upon the income of the household and the cost of their rent.⁹

⁸ The U.S. Department of Housing and Urban Development. [HUD]. (2015). [HUD Recovery Housing Policy Brief](#).

⁹ HUD. (n.d.). Hud Exchange HOME Tenant-Based Rental Assistance. [HUD Exchange website]. Retrieved from: <https://www.hudexchange.info/programs/home/topics/tbra/#policy-guidance-and-faqs>

Tenant Protections

In Oregon, tenant protections are covered under the Oregon State Residential Landlord & Renter Act (ORS Section 90.100-90.875). (Note that this is not the same as the Fair Housing Law, which is a federal law that prohibits housing discrimination based on protected class.) The Oregon Act outlines the rights and responsibilities for renters and landlords, this includes basic habitability and maintenance standards, as well as rules on security deposits, fees, rent increases, utility payments, and the rules that permit the landlord to conduct inspections of a rental unit.

Transitional Housing (TH)

TH is a temporary housing with supportive services to facilitate a household's successful move into permanent housing, typically within 24 months. Participants choose whether to participate in services offered. It may be facility based or scattered site, although all publicly funded TH in Portland and Multnomah County is currently facility based.

Community Program Guidelines and Program Requirements: Defining Best Practices for Service Delivery

Culturally Responsive and Culturally Specific Services

HACC is using definitions of Culturally Responsive and Culturally Specific services developed through a collaborative Metro-wide work group.

Culturally Responsive

Culturally responsive services are general services that have been adapted to honor and align with the beliefs, practices, culture and linguistic needs of diverse consumer / client populations and communities whose members identify as having particular cultural or linguistic affiliations by virtue of their place of birth, ancestry or ethnic origin, religion, preferred language or language spoken at home. Culturally responsive services also refer to services provided in a way that is culturally responsive to the varied and intersecting "biological, social and cultural categories such as gender identity, class, ability, sexual orientation, religion, caste, and other axes of identity."

Culturally responsive organizations typically refer to organizations that possess the knowledge and capacity to respond to the issues of diverse, multicultural communities at multiple intervention points.

Culturally responsive organizations affirmatively adopt and integrate the cultural and social norms and practices of the communities they serve. These organizations seek to comprehensively address internal power and privilege dynamics throughout their service delivery, personnel practices and leadership structure.

A culturally responsive organization is one that reflects the following characteristics:

- Prioritizes responsiveness to the interests of communities experiencing inequities/racism and provides culturally grounded interventions [that] have been designed and developed starting from the values, behaviors, norms, and worldviews of the populations they are intended to serve, and therefore most closely connected to the lived experiences and core cultural constructs of the targeted populations and communities
- Affirmatively adopts and integrates the cultural and social norms and practices of the communities they serve

- Addresses power relationships comprehensively throughout its own organization, through both the types of services provided and its human resources practices. A key way of doing this is engaging in critical analysis of the organization's cultural norms, relationships, and structures, and promoting those that support democratic engagement, healing relationships and environments
- Values and prioritizes relationships with people and communities experiencing inequities universally, paying particular attention to communities experiencing racism and discrimination
- Commits to continuous quality improvement by tracking and regularly reporting progress, and being deeply responsive to community needs
- Strives to eliminate barriers and enhance what is working
- Culturally responsive organizations seek to build change through these major domains:
 - Organizational commitment, leadership, and governance
 - Racial equity policies and implementation practice
 - Organizational climate, culture, and communications
 - Service-based equity and relevance
 - Workforce composition and quality
 - Community collaboration
 - Resource allocation and contracting practices
 - Data metrics and continuous quality improvement

Culturally Specific

Culturally specific services are services provided for specific populations based on their particular needs, where the majority of members/clients are reflective of that community, and use language, structures and settings familiar to the culture of the target population to create an environment of belonging and safety in which services are delivered. Culturally specific organizations typically refer to organizations with a majority of members/clients from a particular community. Culturally specific organizations also have a culturally focused organizational identity and environment, a positive track record of successful community engagement, and recognition from the community served as advancing the best interests of that community.

Organizations providing Culturally Specific Services reflect the following characteristics:

- Programs are designed and continually shaped by community input to exist without structural, cultural, and linguistic barriers encountered by the community in dominant culture services or organizations AND designed to include structural, cultural and linguistic elements specific to the community's culture which create an environment of accessibility, belonging and safety in which individuals can thrive.
- Organizational leaders, decision-makers and staff have the knowledge, skills, and abilities to work with the community, including but not limited to expertise in language, core cultural constructs and institutions; impact of structural racism, individual racism and intergenerational trauma on the community and individuals; formal and informal relationships with community leaders; expertise in the culture's explicit and implicit social mores. Organizational leaders and decision-makers are engaged in improving overall community well-being, and addressing root causes.
- Intimate knowledge of lived experience of the community, including but not limited to the impact of structural or individual racism or discrimination on the community; knowledge of specific disparities documented in the community and how that influences the structure of their program or service; ability to describe the community's cultural practices, health and safety beliefs/practices, positive cultural identity/pride/resilience, immigration dynamics, religious beliefs, etc., and how their services have been adapted to those cultural norms.

- Provide multiple formal and informal channels for meaningful community engagement, participation and feedback at all levels of the organization (from service complaints to community participation at the leadership and board level). Those channels are constructed within the cultural norms, practices, and beliefs of the community, and affirm the positive cultural identity/pride/resilience of the community. Community participation can and does result in desired change.
- Commitment to a highly skilled and experienced workforce by employing robust recruitment, hiring and leadership development practices including but not limited to valuing and caring for community and/or lived experience; requirements for professional and personal references within the community; training standards professional development opportunities and performance monitoring.
- Commitment to safety and belonging through advocacy; design of services from the norms and worldviews of the community; reflect cultural constructs of the culturally specific community; understand and incorporate shared history; create rich support networks; engage all aspects of community; and address power relationships.

Housing First/low barrier Principles:

- Few to no programmatic prerequisites to permanent housing entry
- Low barrier admission policies
- Rapid and streamlined entry into housing
- Supportive services are voluntary, but can and should be used to persistently engage tenants to ensure housing stability
- Tenants have full rights, responsibilities, and legal protections
- Practices and policies to prevent lease violations and evictions
- Evictions from housing do not result in termination from the program

Motivational interviewing

Motivational Interviewing is an established evidence-based practice in the treatment of individuals with substance use disorders. It is a collaborative conversation to strengthen a person's own motivation for, and commitment to, change. Because it is so effective for individuals with substance use disorders, it is an approach applied to many other change-related conversations including homelessness outreach and housing retention supportive services. Motivational Interviewing incorporates strengths-based practice, trauma-informed approach and person-centered approach.

Person Centered Approach

Person Centered Practice honors the individual as the expert in their own life. Each individual should lead and make decisions about their treatment and/or case plan, with supportive services offered as needed.

Strengths-based Practice

Strengths-based practices value the capacity, skills, knowledge, connections and potential in individuals and communities. The service plan and/or supportive services approach leans on the strengths of each individual.

Trauma-informed Approach

Trauma-Informed Care understands and considers the pervasive nature of trauma and

promotes environments of healing and recovery rather than practices and services that may inadvertently re-traumatize. A trauma-informed approach considers Harm Reduction. Harm Reduction is a set of practical strategies and ideas aimed at reducing negative consequences associated with drug use or other behaviors or circumstances.

Equal Access Rule

Equal Access requirements:

- (1) Housing and shelters must be made available to otherwise eligible individuals without regard to sexual orientation, gender identity, or marital status
- (2) Equal access to programs, shelters, other buildings and facilities, benefits, services, and accommodations must be provided in accordance with an individual's gender identity

Appendix B

Clackamas County Supportive Housing Services

Local Implementation Plan Steering Committee (LIP Committee) Roster

Name	Position
Jill Smith	Health Housing and Human Services
Commissioner Sonya Fischer	Clackamas County Commissioner
Kenzie (MacKenzie) Wige	Youth Action Board
Jeff Gage	Housing Authority Resident
Peter Rosenblatt	Continuum of Care
Tabitha Alajmi	At-Large
Jana Hak	At-Large
Katrina Holland	At-Large
Rose Ojeda	At-Large
Bridget Dazey	At-Large
Tony Venzia	At-Large
Awaz Muhamad	At-Large
Vahid Brown	Facilitator
Brooke Page	Facilitator
Heather Lyons	Consultant
Margaret Kilman	Consultant
Abby Ahern	Support Housing Services group
Beth Bryne	Zoom/SHS

Clackamas County Supportive Housing and Services Local Steering Committee Charter

BACKGROUND

In May 2020, the Supportive Housing Services measure was passed by Metro voters. The measure will create new revenue streams from a one percent tax on incomes earned within Metro region above \$200k / \$125k (joint/single). It also creates a one percent business profits tax on net income of businesses with gross receipts of more than \$5 million. Both taxes begin January 2021 and the funds are designated for Supportive Housing Services.

Clackamas County will receive 21.33% of the total revenues generated to provide Supportive Housing Services; including rent assistance, mental health, addiction and recovery services, employment and peers supports, etc.

CHARGE

The Supportive Housing and Services Steering Committee will work with staff to develop a Local Implementation Plan that outlines the funding priorities for Metro measure 26-210 for Clackamas County implementation. The plan they help to develop will be informed by robust community engagement staff subject matter expertise input. The plan will align with the values and goals established by the Metro Stakeholder Advisory Table, including an emphasis on advancing racial equity.

MEMBERSHIP

The Steering Committee will have up to 12 and no fewer than 10 members. Half of the membership will be held by people of color.

5 seats will be appointed from the following bodies:

- H3S staff representative
- Youth Action Board representative
- Continuum of Care Steering Committee representative
- Housing Authority of Clackamas County Resident representative
- Clackamas County Commissioner or representative (non-voting role)

The remaining seats will be designated, with a priority for people with lived experience with homelessness and/or extreme poverty in the past 10 years, for (if not covered above): culturally specific/responsive provider; faith, business or philanthropic sector; health/behavioral health/substance use disorder sectors.

TERM

Steering Committee members attend meetings, monthly or more frequently as

September 2020

needed, of 2.5 hour durations beginning in October 2020. The Local Implementation Plan should be finalized no later than February, 2021. Meetings will be held virtually, on Zoom, until requirements are lifted and it is safe to meet in person. This steering committee may continue to meet following the finalization of the Local Implementation Plan to provide advisory guidance on implementation efforts beginning in 2021.

STIPEND

Any board member who is not otherwise being paid for their time serving on this board is eligible for stipend at \$25/hour of meeting and meeting preparation time. Board members will be given an opportunity to waive this compensation and provide expertise on a volunteer basis.

GOVERNANCE STRUCTURE

The Steering Committee will provide recommendations to the Housing Authority staff, and has no formal delegated power of authority to represent Clackamas County or commit to the expenditure of any funds. The Steering Committee may identify members to present recommendations to the Housing Authority of Clackamas County and/or other governing bodies and community groups as needed.

DECISION-MAKING AND QUORUM

The Steering Committee will operate by consensus, taking votes only where needed. A quorum must be present to vote on recommendations. A vote on an action or decision requires a majority of those present. A quorum is a simple majority of the total committee. It is the Steering Committee member's responsibility to self-identify and disclose any conflict of interest and abstain from decision making if appropriate.

WORKING AGREEMENT

Steering Committee members agree to operate under the following working agreement (and any other such agreements as are established in the steering committee's first meeting):

- Listen and listen again.
- Be respectful and courteous to the diversity of opinions in the room.
- Direct passionate opinions toward sharing information, not at each other.
- Allow the facilitator to keep the discussion moving and on task.
- Start and end meetings on time.

Appendix C

Housing Affordability and Homelessness Task Force



Equity Lens

Clackamas County defines equity as: The principled commitment to ensuring the absence of visible and invisible barriers to fairness in representation, opportunity and access.

Vision Statement:

We envision a Clackamas County Task Force on Affordable Housing and Homelessness that engages communities of color and those disproportionately impacted by historic and current housing disparities in the county, that leads by example and actively makes informed decisions while bringing the voices of those disproportionately affected to the table, and that considers current and future impacts that our decisions make on communities of color and impacted populations.

What is a racial equity lens?

In work many of us use lenses (such as safety, trauma-informed and ethical lenses) to determine if a decision fits an organization's values and operating principles.

This racial equity lens is a tool that the Clackamas County Task Force on Housing Affordability and Homelessness will use to determine if we have achieved equity in our decisions and recommendations. The lens will help us see disparities, consequences, sources of structural inequity and institutional racism, potential impacts on communities of color and historically marginalized communities in Clackamas County. The goal is to turn our intentions into actions and strive to right historical wrongs in our society, creating a welcoming Clackamas County for community members of all different backgrounds.

Questions to ask when considering if a policy is equitable:

- What communities are impacted by the policy we're considering?
- Are they at the table?
 - If yes: What is their perspective?
 - If no: Why not? How can we get their perspective before moving forward with a recommendation?
- What disparate impacts may arise from this recommendation? Areas to consider are: Housing Access, Housing Stability, Displacement
 - To what extent does the proposed policy worsen disparities toward affected groups?
 - Does the proposed policy aim to correct, change or challenge institutional racism?
- What are the intended benefits or unintended consequences that might impact affected groups as a result of the policy or recommendation?
- Has the county considered disparate impacts already?
 - If yes: what existing analysis can we draw from to make an informed decision?
 - If no: What analysis does the county need to complete before we can make an informed decision?

Appendix D



Metro

oregonmetro.gov

Supportive Housing Services Program Work Plan

December 2020

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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Bob Stacey, District 6

Auditor

Brian Evans

600 NE Grand Ave.
Portland, OR 97232-2736
503-797-1700

2020 SUPPORTIVE HOUSING SERVICES PROGRAM WORK PLAN

Adopted by Resolution No. xx-xxxx on xxxx, 2020 by the Metro Council.

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1. INTRODUCTION

On May 19, 2020, voters in the greater Portland region approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of experiencing homelessness. Community members and leaders from around the region developed the measure to provide the much-needed housing and wraparound services to effectively and permanently elevate people out of homelessness.

The ballot measure (see Addendum A) will fund a new Supportive Housing Services Program that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness. The program is guided by a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color (BIPOC) who are disproportionately impacted by housing instability and homelessness.

The Supportive Housing Services Program will directly fund Clackamas, Multnomah and Washington counties to invest in local strategies to meet the needs in their communities. Revenue will be distributed within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in those counties.

The program is funded through a 1 percent tax on all taxable income of more than \$125,000 for individuals and \$200,000 for joint filers and a 1 percent tax on profits from businesses with gross receipts of more than \$5 million. The new tax requirements begin in January 2021. Initial revenues are expected to be available for the first phase of program implementation by July 2021. The program will be funded through December 2030, unless reauthorized by the voters on or before that date.

In February 2020, the Metro Council adopted Ordinance No. 20-1442 which provided guidelines for Supportive Housing Services Program implementation including eligible services, priority populations, governance, local implementation plans, allocation of revenue, equity and community engagement, and tri-county planning. In June to September 2020, Metro convened a stakeholder advisory table that developed recommendations for regional values to guide program implementation and outcome metrics to ensure transparent oversight and accountability.

This Supportive Housing Services Work Plan provides a comprehensive plan for implementing the program. The Work Plan incorporates and supplements the guidelines in Ordinance No. 20-1442 and the recommendations of the stakeholder advisory table. In addition to Metro Chapter 11.01, it serves as the governing document for program implementation, addressing how Supportive Housing Services revenues will be administered to achieve the goals described in the ballot measure.

2. GUIDING PRINCIPLES AND RACIAL EQUITY

Supportive Housing Services Program implementation will be guided by the following principles, which were developed by the stakeholder advisory table:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;

- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are, and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

Metro has adopted a Strategic Plan to Advance Racial Equity, Diversity and Inclusion which includes specific goals and objectives to ensure that all people who live, work and recreate in the greater Portland region have the opportunity to share in and help define a thriving, livable and prosperous region. A key objective for Supportive Housing Services Program implementation is a commitment to advance equity related to stable and affordable housing. In implementing the program, Metro will rely on the goals and objectives within the Strategic Plan to:

- Convene regional partners to advance racial equity outcomes in supportive housing services;
- Meaningfully engage with Black, Indigenous and people of color, people with low incomes, and other historically marginalized communities in establishing outcomes and implementing the program;
- Produce and provide research and information to support regional jurisdictions in advancing equity efforts;
- Increase accountability by ensuring involvement of Black, Indigenous and people of color in establishing goals, outcomes, and implementation and evaluation efforts;
- Increase participation of Black, Indigenous and people of color in decision-making; and
- Use equity criteria in resource allocation for the program.

Metro will actively work to remove barriers for organizations and communities to ensure full participation by providing stipends, scheduling events at accessible times and locations, and other inclusive engagement tactics.

3. GOVERNANCE

On February 25, 2020, the Metro Council adopted Ordinance No. 20-1442 referring to voters the ballot measure authorizing Metro to impose a tax to fund supportive housing services. The Supportive Housing Services Program and this Work Plan must comply with the promises made to the voters in the ballot measure.

3.1 METRO COUNCIL

The Metro Council provides policy direction for the Supportive Housing Services Program through:

- A. Adoption of this Work Plan;
- B. Appointment of Regional Oversight Committee members, chair and/or co-chairs, collectively charged with monitoring program implementation;
- C. Approval of Local Implementation Plans;
- D. Approval of intergovernmental agreements for implementation (each, an “Implementation IGA”) with Local Implementation Partners; and
- E. Monitoring of program outcomes, with guidance from the Regional Oversight Committee and tri-county advisory body.

3.2 METRO CHIEF OPERATING OFFICER AND STAFF

The Metro Chief Operating Officer (COO) is authorized by the Metro Council to implement this Work Plan, and the COO will direct staff to conduct all Supportive Housing Services Program administration activities referenced herein, including (without limitation) the following:

- A. Ensure program implementation upholds promises made to voters;
- B. Develop and execute Implementation IGAs with Local Implementation Partners;
- C. Implement efficient and effective collection of personal and business income taxes;
- D. Develop and coordinate systems and structures to provide robust oversight and accountability and ensure transparency of public funds;
- E. Convene meetings and provide administrative support for the Regional Oversight Committee;
- F. Provide staffing and logistical support for a tri-county advisory body to identify regional goals, strategies and outcome metrics related to addressing homelessness in the region; and
- G. Conduct an annual independent financial audit with results made publicly available.

3.3 LOCAL IMPLEMENTATION PARTNERS

Metro will partner with Clackamas, Multnomah and Washington county governments and their housing authorities to lead Supportive Housing Services Program implementation. The three county governments will serve as Metro’s Local Implementation Partners for the program. As experts in implementing programs that serve community members experiencing homelessness, the Local Implementation Partners will work with service providers and community partners to develop and implement programs that respond to the unique needs in their communities.

Local Implementation Partners must:

- A. Adopt a Local Implementation Plan, informed by community engagement, that describes local housing and homeless service needs, current programming and unmet programming capacities, proposed use of funds, and a strategy for advancing racial equity and ensuring community engagement in implementation (see Section 5.1 and Addendum D);

- B. Enter into an Implementation IGA with Metro, obligating the Local Implementation Partner to comply with this Work Plan and enter into certain covenants required to ensure compliance with the ballot measure and other applicable law; and
- C. Track and report on program outcomes annually as defined through this Work Plan.

3.4 REGIONAL OVERSIGHT COMMITTEE

In accordance with Metro Code Section 2.19.270, Metro will appoint a Regional Oversight Committee to provide policy and programmatic guidance, monitor programmatic expenditures and evaluate outcomes (see Addendum 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;
- B. Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals;
- C. Monitor financial aspects of program administration, including review of program expenditures; and
- D. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.

Membership

The committee will be composed of 15 voting members with 5 members each from Clackamas, Washington and Multnomah counties. Committee members will be appointed by the Metro Council.

The committee's membership will include a broad range of personal and professional experience, including people with lived experience of homelessness or housing instability. The committee will also reflect the diversity of the region. The membership will include people with the following experiences, perspectives and qualities:

- Experience overseeing, providing or delivering supportive housing services;
- Lived experience of homelessness or severe housing instability;
- Experience in the development and implementation of supportive housing and other services;
- Experience in the delivery of culturally specific services;
- Experience in the private for-profit sector;
- Experience in the philanthropic sector;
- Experience in a Continuum of Care organization; and
- People who identify as Black, Indigenous and people of color, people with low incomes, immigrants and refugees, the LGBTQ+ community, people with disabilities and other underserved and/or marginalized communities.

Stipends, childcare, technical assistance, interpretation, accessibility assistance and other supports for participation will be available.

Committee members will serve two-year terms.

Jurisdictional representation

One representative each from the Clackamas, Multnomah and Washington County Boards of Commissioners, Portland City Council and Metro Council will serve on the committee as non-voting delegates.

Accountability

All committee meetings and materials will be available and accessible to the public, and appropriate notice will be given to inform all interested parties of the time, place and agenda of each meeting.

Committee members are considered public officials under Oregon law and will be responsible for complying with provisions in Oregon law regarding public records and public meetings, disclosure of conflicts of interest, prohibitions on the use of official positions to obtain financial benefit, and restrictions on political activity.

Metro may conduct a review of the committee's role and effectiveness as appropriate.

4. FUNDING DISTRIBUTION AND ELIGIBLE USES

4.1. ALLOCATION AND DISTRIBUTION OF SUPPORTIVE HOUSING SERVICES REVENUE

Supportive Housing Services revenue will be distributed as follows:

- A. After Metro has first retained funds necessary to pay for collection of the taxes, including debt service related to the implementation costs, Metro may retain up to 5 percent of the remaining collected revenue for administration, oversight and accountability, data collection, coordination, and other costs associated with management of the regional program.
- B. After the funds have been allocated as set forth in Section 4.1.A, Metro will then allocate the remaining Supportive Housing Services revenue within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in those counties. Funds will be distributed to the Local Implementation Partner within each county using the following percentages: 21 1/3 percent to Clackamas County, 45 1/3 percent to Multnomah County and 33 1/3 percent to Washington County.
- C. The percentages set forth in Section 4.1.B apply to revenue for the first two tax years. Thereafter, the percentages may be adjusted to reflect the portion of Supportive Housing Services revenue actually collected in each county.
- D. Metro's Implementation IGAs with each Local Implementation Partner will specify how Supportive Housing Services funds will be released. Agreements will include specifications for annual program budgets, financial reporting, practices for reserving funds, and redistribution of funds if a jurisdiction fails to comply with the agreement.

4.2 PRIORITIZATION OF SUPPORTIVE HOUSING SERVICES FUNDS

Each Local Implementation Partner must create a Local Implementation Plan outlining its proposed use of funds in accordance with the purposes of the program (see Section 5.1 and Addendum D). Local Implementation Plans must include a commitment that funding will be allocated as follows (see Addendum C for definitions of the terms used in Sections 4.2 and 4.3):

- A. Seventy-five percent of funds will be devoted to services for population A, defined as:

- Extremely low-income; AND
- Have one or more disabling conditions; AND
- Are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness.

B. Twenty-five percent of funds will be devoted to services for population B, defined as:

- Experiencing homelessness; OR
- Have a substantial risk of experiencing homelessness.

This distribution of resources to serve priority populations may be adjusted over time as chronic and prolonged homelessness is reduced.

4.3 ELIGIBLE USES OF SUPPORTIVE HOUSING SERVICES FUNDS

The Supportive Housing Services Program is guided by regional goals and oversight, but implemented by Local Implementation Partners who are best positioned to respond to community needs. Successful implementation requires flexibility for local jurisdictions to create and implement strategies that respond to local community needs and effectively leverage local capacity and expertise. The uses of Supportive Housing Services funds will be guided by each county’s Local Implementation Plan.

Eligible uses of funds include any of the supportive housing services defined in Addendum C as well as administrative costs within applicable limits (see Section 4.5).

Funds are prioritized for ongoing service and operating costs to support implementation of supportive housing services as defined in Section 4.5. Under certain circumstances, capital costs directly related to those supportive housing services may be eligible if necessary to support ongoing implementation of the services and when consistent with Local Implementation Plans.

Programmatic success will be based on housing stability achieved by people experiencing homelessness or at risk of homelessness. An approach that effectively balances supportive services with long-term rent assistance and other housing strategies will therefore be necessary.

Funds may only be used for services provided within the portion of each recipient county that is within the Metro jurisdictional boundary.

4.4 REGIONAL APPROACH TO MEETING SUPPORTIVE HOUSING NEED

A regional approach is required to effectively address service and resource gaps to meet the needs of the Supportive Housing Services Program’s priority populations across the region. Local Implementation Partners will work together to enhance and expand local programs and services so that they share responsibility to address unmet needs across the region. Each county will develop and enhance local supportive housing services to address the needs of the portion of the region’s homeless population that is proportionate to the percentage of Supportive Housing Services revenues allocated to each county (see Section 4.1).

4.5 ADMINISTRATIVE COSTS

It is the policy of the Metro Council to maintain low administrative costs to ensure that the maximum amount possible of Supportive Housing Services revenue is used to fund supportive housing services.

Administrative costs will be restricted as follows:

- A. As described in Section 4.1.A, after Metro’s tax collection costs are paid, Metro may retain up to 5 percent of the remaining funds to pay for the costs to disburse the funds and administer and oversee the program. This includes convening and supporting the Regional Oversight Committee, establishing a regional data collection and reporting program, and supporting tri-county regional collaboration.
- B. Administrative expenses incurred by Local Implementation Partners for provision of services are recommended not to exceed five percent of total annual funds allocated for provision of services, consistent with guidelines for similar programs funded by the State.
- C. Administrative expenses incurred by Local Implementation Partners and housing authorities for administering long-term rent assistance programs are recommended not to exceed 10 percent of total annual funds allocated for long-term rent assistance, consistent with guidelines for similar programs funded by HUD and the State.
- D. Administrative expenses incurred by service providers are expected to vary based on program type, organizational capacity and other factors. The Regional Oversight Committee will include an analysis of service provider administrative costs in its annual monitoring of program expenditures. Based on this review, the committee may recommend adoption of service provider administrative cost guidelines for Metro Council consideration.

Administrative costs do not include costs directly associated with program and service delivery.

At least annually, the Regional Oversight Committee will consider whether the recommended administrative costs should be reduced or increased.

5. ACCOUNTABILITY STRUCTURES AND PROCESS

5.1 LOCAL IMPLEMENTATION PLANS

Each county will prepare a Local Implementation Plan to describe their local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program. Plans must be created using a racial equity lens that ensures equitable participation, access and outcomes in all parts of the program and considers the best available quantitative and qualitative data.

Development and approval process

Each Local Implementation Plan must be developed using locally convened and comprehensive engagement processes that prioritize the voices of Black, Indigenous and people of color and people with lived experience. Plans must be developed in full partnership with advisory bodies that equitably reflect community expertise and experience. Each county may convene a new advisory body or use an existing body that fulfills the representation requirements.

Advisory body membership must include:

- People with lived experience of homelessness and/or extreme poverty;
- People from Black, Indigenous and people of color and other marginalized communities;
- Culturally responsive and culturally specific service providers;

- Elected officials, or their representatives, from the county and cities participating in the regional affordable housing bond;
- Representatives from the business, faith and philanthropic sectors;
- Representatives of the county/city agencies responsible for implementing housing and homelessness services, and that routinely engage with unsheltered people;
- Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use from culturally responsive and culturally specific service providers; and
- Representation ensuring geographic diversity.

Each Local Implementation Plan will be reviewed and approved by the respective county's local governing body, the Regional Oversight Committee and the Metro Council. Upon full approval, each Local Implementation Plan will be incorporated into the Intergovernmental Agreements between Metro and each respective county to govern transfer of funds, program implementation, and ongoing oversight and accountability.

Required elements

Local Implementation Plans must include the following elements, described in greater detail in Addendum D:

- A. *Analysis of inequitable outcomes*: An articulation of racial inequities in housing stability and access to current services;
- B. *Racial equity strategies*: A description of mitigation strategies and how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion have been incorporated;
- C. *Inclusive community engagement*: An articulation of how perspectives of Black, Indigenous and people of color and culturally specific groups were considered and incorporated into the development of the plan and will continue to be engaged through implementation and evaluation;
- D. *Priority population investment distribution*: A commitment that funding will be allocated as specified in Section 4.2;
- E. *Current investments*: A review of current system investments or capacity serving priority populations, an analysis of the nature and extent of gaps in services to meet the needs of the priority population, and a commitment to prohibit displacement of current local funding commitments for such services;
- F. *Distribution*: A strategy for equitable geographic distribution of services with partnering jurisdictions and service providers across the region;
- G. *Access coordination*: A plan for coordinating access to services with partnering jurisdictions and service providers across the region;
- H. *Procurement and partners*: A description of how funds will be allocated to public and nonprofit service providers;
- I. *Planned investments*: An articulation of programmatic investments planned, including the types of services to be funded to address the gap analysis;
- J. *Outcomes, reporting and evaluation*: An agreement to track and report on program outcomes annually as defined through regional coordination and with regional metrics.

Updates and amendments

Local Implementation Plans may be revised or amended only upon written agreement by the Local Implementation Partner, recommendation for approval by the Regional Oversight Committee and approval by Metro Council. Proposed changes to a Local Implementation Plan will be presented as amendments to the Regional Oversight Committee for approval and confirmed by Metro Council.

5.2 REGIONAL OUTCOME METRICS

Regional outcome metrics will be used to understand the impacts and outcomes of the Supportive Housing Services Program. The required metrics will provide clear and consistent data sets that ensure transparent accountability and regional analysis of outcomes. They will be measured consistently in each county and reported to Metro and the Regional Oversight Committee. Staff will work to create standardized definitions and methodologies to achieve the intentions of the metrics as described below.

Additional collaboration between Metro, Local Implementation Partners and community experts will further refine and ensure quality control for each metric. Metrics will be phased in over time according to the regional system's capacity to comply with the newly established regional standards.

Required regional outcome metrics will include:

A. Housing stability

Measurable goals:

- Housing equity is advanced by providing access to services and housing for Black, Indigenous and people of color at greater rates than Black, Indigenous and people of color experiencing homelessness.
- Housing equity is advanced with housing stability outcomes (retention rates) for Black, Indigenous and people of color that are equal or better than housing stability outcomes for non-Hispanic whites.
- The disparate rate of Black, Indigenous and people of color experiencing chronic homelessness is significantly reduced.

Outcome metrics:

- Number of supportive housing units created and total capacity, compared to households in need of supportive housing. This will measure change in supportive housing system capacity and need over time.
- Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year. This will measure programmatic inflow and outflow.
- Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing) and priority population type. This will measure people being served.
- Housing retention rates. This will measure if housing stability is achieved with supportive housing.
- 'Length of homelessness' and 'returns to homelessness'. These will measure how effectively the system is meeting the need over time.

- Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice. This will measure leveraged impact of funding in each county.

B. Equitable service delivery

Measurable goals:

- Increase culturally specific organization capacity with increased investments and expanded organizational reach for culturally specific organizations and programs.
- All supportive housing services providers work to build anti-racist, gender-affirming systems with regionally established, culturally responsive policies, standards and technical assistance.

Outcome metrics:

- Scale of investments made through culturally specific service providers to measure increased capacity over time.
- Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages.
- Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience.

C. Engagement and decision-making

Measurable goals:

- Black, Indigenous and people of color are overrepresented on all decision-making and advisory bodies.
- Black, Indigenous and people of color and people with lived experience are engaged disproportionately to inform program design and decision making.

Outcome metrics:

- Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness.

Data disaggregation

In keeping with Metro’s commitment to advance racial equity, and the Supportive Housing Services Program’s overarching goal to ensure racial justice, data will be disaggregated to evaluate existing and continued disparate impacts for BIPOC communities and other impacted populations. As such, all applicable data sets will be disaggregated by regionally standardized values and methodology to understand disparate outcomes for people by race, ethnicity, disability status, sexual orientation and gender identity.

5.3 ANNUAL REVIEW PROCESS

Each Local Implementation Partner will submit an Annual Progress Report to the Metro Council and the Regional Oversight Committee summarizing its progress and outcomes under the Local Implementation Plan, including:

- A. A full program accounting of investments or a financial report;
- B. Reporting on required outcome metrics; and

- C. An equity analysis incorporated into all facets of the report, including reporting on the success or failure of racial inequity mitigation strategies and steps being taken to improve racial equity outcomes.

A template for the Annual Progress Report will be developed by Metro with input from the Local Implementation Partners.

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. The Local Implementation Partner will identify proposed strategies to address the Regional Oversight Committee's recommendations. The proposed strategies will be submitted to the Regional Oversight Committee for approval and confirmed by Metro Council.

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.

5.4 AUDITS

A public accounting firm must conduct an annual financial audit of the revenue generated by the Supportive Housing Services taxes and the distribution of that revenue. Metro will make public the audit and any report to the Metro Council regarding the results of the audit. Metro may use the revenue generated by the taxes to pay for the costs of the audit.

The revenue and expenditures from the taxes are also subject to performance audits conducted by the Office of the Metro Auditor.

6. REGIONAL COORDINATION

6.1 TRI-COUNTY ADVISORY BODY

Metro will convene a tri-county advisory body to strengthen regional coordination in addressing homelessness in the region. The advisory body will identify regional goals, strategies and outcome metrics and provide guidance and recommendations to inform Supportive Housing Services Program implementation.

The advisory body will include people representing the following perspectives:

- People with lived experience of homelessness and/or extreme poverty;
- People from Black, Indigenous and people of color and other marginalized communities;
- Culturally responsive and culturally specific service providers;
- Elected officials, or their representatives, from the counties and cities participating in the regional affordable housing bond;
- Representatives from the business, faith and philanthropic sectors;
- Representatives of county/city agencies responsible for implementing housing and homelessness services, and that routinely engage with unsheltered people;

- Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use from culturally responsive and culturally specific service providers; and
- Representation ensuring geographic diversity.

Metro will work with the Local Implementation Partners to develop a proposed structure, charter and procedures for the tri-county advisory body, to be presented to Metro Council for approval.

Metro will provide ongoing staffing and logistical support to convene the advisory body and support its planning and coordination efforts. Local Implementation Partners will work to incorporate the advisory body's recommendations into their implementation strategies.

6.2 TRI-COUNTY PLANNING

The tri-county advisory body will lead a planning process to develop recommendations for regional coordination related to these and other issue areas as identified:

- *Regional capacity*: strategies to strengthen regional supportive housing capacity, including but not limited to: coordination of capital investments funded by the regional affordable housing bond and other sources, development of a regional model of long-term rent assistance, and expanded system capacity for culturally specific housing and services;
- *Systems alignment*: coordination and integration between the housing and homeless service systems, as well as other systems serving people experiencing homelessness, including the healthcare, education, workforce and criminal justice systems; and
- *Standards and metrics*: regional performance metrics to measure the impact of specific program types, regional system indicators to measure changes in the population experiencing homelessness, consistency in program evaluation standards and procedures, standards for culturally responsive services, and standardized data definitions, data collection methods and quality control.

ADDENDUM A

BALLOT MEASURE 26-210

Ballot Title:	Supports homeless services through higher earners’ tax, business profits tax.
Question:	Should Metro support homeless services, tax income over \$200,000/\$125,000(joint/single), profits on businesses with income over \$5 million?
Summary:	<p>Measure funds supportive housing services to prevent and reduce homelessness in Washington, Clackamas, and Multnomah counties within district boundaries. Prioritizes services to address needs of people experiencing, or at risk of, long-term or frequent episodes of homelessness. Services funded by a marginal income tax of 1% on households with income over \$200,000 (over \$125,000 for single filers) and a business profits tax of 1%. Income tax applies to resident income, and to non-resident income earned from sources within district. Exempts businesses with gross receipts of \$5 million per year or less.</p> <p>Declares funding for homelessness services a matter of metropolitan concern, directs regional funding to local services agencies, requires community engagement to develop localized implementation plans. Allocates funds to counties by estimated revenue collected within each county. Establishes community oversight committee to evaluate and approve local plans, monitor program outcomes and uses of funds. Requires creation of tri- county homeless services coordination plan.</p> <p>Requires performance reviews and independent financial audits. Metro administrative and oversight costs limited to 5%. Requires voter approval to continue tax after 2030.</p>
Explanatory Statement:	<p>The greater Portland region is facing a severe housing affordability and homelessness crisis. Rents and housing prices have risen faster than wages, making it especially hard for people living on fixed retirement or disability incomes to afford housing. While it is difficult to accurately estimate the number of people experiencing homelessness, or at risk of becoming homeless, according to a February 2020 report by EcoNorthwest, an estimated 38,263 people (24,260 households) experienced homelessness in 2017 in Washington, Clackamas and Multnomah counties; thousands more were at risk.</p> <p>Homelessness disproportionately impacts people with disabilities, people of color, and seniors. For people who experience homelessness, disabling conditions such as mental illness, chronic medical conditions, and addiction are made worse, and become barriers to housing placement.</p> <p>Providing supportive housing services is a widely demonstrated approach to effectively end homelessness for individuals who have experienced</p>

	<p>prolonged and repeated homelessness, and protecting families from becoming homeless with prevention assistance. Supportive housing services include case management, mental healthcare, addiction and recovery treatment, employment services, rent assistance, and other care as needed. Despite state and local efforts to increase investment in supportive housing services, the need in greater Portland exceeds local capacity.</p> <p>This measure will authorize Metro to establish a regional supportive housing funding program, providing the resources to address unmet needs of people experiencing or at risk of experiencing long-term or frequent episodes of homelessness in the greater Portland region. The measure will result in a substantial increase in the delivery of supportive housing services.</p> <p>Supportive housing services will be funded by a marginal personal income tax of 1% on households with taxable income over \$200,000 (or taxable income over \$125,000 for individual tax filers) and a business profits tax of 1% with an exemption for small businesses that have gross receipts of \$5 million or less per year. The personal income tax will be assessed on residents of the Metro district, and on non-residents who have income earned from sources within the district. Only income above \$200,000 (\$125,000 individual) is taxed.</p> <p>In each county a local implementation plan will be developed to describe how supportive housing services will be prioritized and delivered to address local needs. Local plans must be developed using comprehensive community engagement that prioritizes those most directly affected by the homelessness crisis.</p> <p>A regional oversight committee with broad geographic representation will review and evaluate each local plan, monitor local implementation, and review spending. The oversight committee will report every year to Metro Council on program outcomes and areas for improvement, and annual performance and financial audits of funding for supportive housing services will be conducted. Metro administrative costs are limited to 5% and must be reviewed annually. The measure requires voter approval to continue after 2030.</p>
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On Behalf of:

- Metro Council President Lynn Peterson
- Councilor Shirley Craddick
- Councilor Christine Lewis
- Councilor Craig Dirksen
- Councilor Juan Carlos Gonzales
- Councilor Sam Chase
- Councilor Bob Stacey

Submitted by: Carrie MacLaren, Metro Attorney

ADDENDUM B

REGIONAL OVERSIGHT COMMITTEE CHARTER

Background on the Supportive Housing Services Program

On May 19, 2020, voters in the greater Portland region approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of experiencing homelessness. Community members and leaders from around the region developed the measure to provide the much-needed housing and wraparound services to effectively and permanently elevate people out of homelessness.

The ballot measure will fund a new Supportive Housing Services Program that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness. The program is guided by a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color who are disproportionately impacted by housing instability and homelessness.

Implementation of the program will be guided by the following principles:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;
- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

The Supportive Housing Services Program is guided by regional goals and oversight but implemented by Local Implementation Partners who are best positioned to respond to community needs. The program will directly fund Clackamas, Multnomah and Washington counties to invest in local strategies to meet the supportive housing and service needs in their communities.

Regional Oversight Committee Authorizing Ordinance

The Metro Council established the Regional Oversight Committee on 11, 19, 2020 by amending Metro Code Chapter 2.19.270 via Ordinance No. 20-1453.

Regional Oversight Committee's Purpose and Authority

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 and outcomes.

The committee is charged with the following duties:

- Evaluate Local Implementation Plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
- Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals;
- Monitor financial aspects of program administration, including review of program expenditures; and
- Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.

Committee Membership

The committee is composed of 15 voting members (5 members each from Clackamas, Multnomah and Washington counties), appointed by the Metro Council President subject to Metro Council confirmation.

Committee membership represents a diversity of perspectives, geography, demographics, and personal and professional experience, including people with lived experience of homelessness or housing instability from across the region. Committee members serve as independent representatives of the community contributing their experiences and expertise to the oversight work. Members do not represent any specific organizations, jurisdictions or other entities.

The Metro Council President will designate at least one member to serve as chairperson of the committee or may elect to designate two members to serve as co-chairpersons of the committee.

- **Terms of service:** Nine of the initial committee members will be appointed to serve a one-year term and may be reappointed to serve up to two additional two-year terms. All other committee members will be appointed to serve two-year terms and may be reappointed to serve up to two additional two-year terms. The committee will be dissolved in 2031 or upon the issuance of a final report by the committee after all funds authorized by Ballot Measure 26-210 have been spent, whichever is earlier.
- **Attendance:** The committee will meet no fewer than four times a year. Meetings will be more frequent in the first year, and at least quarterly throughout program implementation. In the interest of maintaining continuity in discussions, members commit to attending all meetings unless they are prevented from doing so by reasonable excuse. Committee members will notify staff ahead of meetings if they are unable to be present, and will read materials and request briefings from staff on the information presented, deliberations and outcomes of the meeting. The committee will not use alternates or proxies.

Chairperson(s) Role

Chairperson(s) may be selected by the Metro Council President to support and provide guidance on content and ideas to meet the committee goals, support decision making procedures, and help develop agendas and the work program of the committee.

Metro Council and Staff Roles

Metro Council will appoint committee members, receive committee recommendations and annual review reports to inform Local Implementation Plan approval and policy decisions. Metro staff will facilitate the work program of the committee, provide policy and program information and context as needed to the committee, and work in coordination with programmatic staff from Implementing Partner jurisdictions.

Elected Delegate Role

Elected delegates representing partnering jurisdictions will be present to the oversight and accountability work to receive feedback and direction from the committee relevant to program implementation outcomes, and transfer knowledge and communication directly to their respective jurisdictions. One representative from each of the following jurisdictions will participate on the committee as non-voting delegates:

- Metro Council
- Clackamas County Board of Commissioners
- Multnomah County Board of Commissioners
- Washington County Board of Commissioners
- Portland City Council

Accountability

All committee meetings and materials will be available and accessible to the public, and appropriate notice will be given to inform all interested parties of the time, place and agenda of each meeting.

Committee members are considered public officials under Oregon law and are responsible for complying with provisions in Oregon law, including:

- **Use of position:** Committee members are prohibited from using or attempting to use their position (including access to confidential information obtained through their position) to obtain a financial benefit for themselves, for a relative or for a business with which the member or relative is associated.
- **Conflicts of interest:** Committee members must publicly announce any potential or actual conflicts of interest on each occasion that they are met with the conflict. A conflict of interest occurs when a member's official actions on the committee could or would result in a financial benefit or detriment to themselves, a relative or a business with which the member or relative is associated. In the case of an actual conflict of interest, committee members must refrain from participating in any discussion or taking any action on the issue.

- **Restrictions on political activity:** Committee members may not engage in campaign-related political activity during committee meetings or while working in an official capacity as a committee member. Restricted activities include promoting or opposing candidates, ballot measures or political committees.
- **Public records and meetings:** Committee members are subject to the provisions of Oregon Public Records and Meetings Law. All committee meetings and records shall be open and available to the public. This includes discussions of committee business by email or in gatherings of a quorum of committee members outside of regular committee meetings.

ADDENDUM C

DEFINITIONS FOR SECTIONS 4.2 AND 4.3

Extremely low income: A household earning less than 30 percent of Area Median Income (AMI).

Extremely rent burdened: A household paying 50 percent or more of income toward rent and utilities.

Homelessness: An individual or family who lacks a fixed, regular and adequate nighttime residence including:

- Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason; are living in motels, hotels, trailer parks or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals;
- Individuals or families who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; or
- Individuals or families who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations or similar settings.

Imminent risk of literal homelessness: Any circumstance that provides clear evidence that an individual or family will become literally homeless without supportive housing services within 14 days of application for assistance. This includes but is not limited to:

- Individuals or families who are involuntarily doubled up and who face literal homelessness;
- Individuals exiting an institution (including but not limited to exiting incarceration or foster care) and who face literal homelessness; and
- Individuals or families fleeing a domestic violence or abuse situation and who face literal homelessness.

Involuntarily doubled up: Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason.

Literal homelessness: An individual or family who lacks a fixed, regular and adequate nighttime residence, meaning:

- Has a primary nighttime residence that is a public or private place not meant for human habitation;
- Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
- Is exiting an institution where the individual has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

Long-term and frequent episodes of literal homelessness: 12 or more months of literal homelessness over three years.

Substantial risk of homelessness: A circumstance that exists if a household is very low income and extremely rent burdened, or any other circumstance that would make it more likely than not that without supportive housing services the household will become literally homeless or involuntarily doubled-up.

Supportive housing services: Services for people experiencing homelessness and housing instability including, but not limited to:

- Housing services:
 - supportive housing
 - long-term rent assistance
 - short-term rent assistance
 - housing placement services
 - eviction prevention
 - transitional housing
 - shelter
- Outreach and engagement supports:
 - street outreach services
 - in-reach services
 - basic survival support services
- Health and wellness supports:
 - mental health services
 - interventions and addiction services (crisis and recovery)
 - physical health services
 - intervention services for people with physical impairments and disabilities
 - peer support services
 - discharge intervention services
- Employment and benefit supports:
 - financial literacy services
 - employment services
 - job training and retention services
 - educational services
 - workplace supports
 - benefits navigation and attainment services
- Advocacy supports:
 - landlord tenant education and legal services
 - fair housing advocacy

Very low income: A household earning less than 50 percent of AMI.

ADDENDUM D

LOCAL IMPLEMENTATION PLAN REQUIREMENTS

Each county will prepare a Local Implementation Plan to describe their local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program.

Local Implementation Plans must include:

- A. **Analysis of inequitable outcomes.** An articulation of racial inequities in housing stability and access to current services, including:
 - An analysis of the racial disparities among people experiencing homelessness and the priority service population;
 - An analysis of the racial disparities in access to programs, and housing and services outcomes, for people experiencing homelessness and the priority service populations; and
 - An articulation of barriers to program access that contribute to the disparities identified in the above analysis.
- B. **Racial equity strategies.** A description of mitigation strategies and how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion have been incorporated. This should include a thorough racial equity analysis and strategy that includes clearly defined mitigation strategies and resource allocations intended to remedy existing disparities and ensure equitable access to funds and services.
- C. **Inclusive community engagement.** An articulation of how perspectives and recommendations of Black, Indigenous and people of color, people with lived experiences, and culturally specific groups were considered and incorporated into the development of the plan and will continue to be engaged through implementation and evaluation. Including:
 - Advisory body membership that meets the criteria listed in Section 5.1; and
 - A description of how the plan will remove barriers to participation for organizations and communities by providing stipends, scheduling events at accessible times and locations, and other supportive engagement strategies.
- D. **Priority population investment distribution.** A commitment that funding will be allocated as defined in Section 4.2.
- E. **Current investments.** A review of current system investments or capacity serving priority populations, including:
 - An analysis of the nature and extent of gaps in services to meet the needs of the priority population, broken down by service type, household types and demographic groups.
 - A commitment to maintain local funds currently provided. Supportive Housing Services revenue may not replace current funding levels, with the exception of good cause requests for a temporary waiver such as a broad economic downturn.
- F. **Distribution.** A strategy for equitable geographic distribution of services within the respective jurisdictional boundary and the Metro jurisdictional boundary.

- G. **Access coordination.** A plan for coordinating access to services with partnering jurisdictions and service providers across the region. This includes a commitment that any documentation required for determining program eligibility will be low barrier and include self-reporting options.
- H. **Procurement and partners.** A description of how funds will be allocated to public and nonprofit service providers, including:
- Transparent procurement processes and a description of the workforce equity procurement standards;
 - A commitment to partner with service providers who affirmatively ensure equitable pay and livable wages for their workers, and who will provide anti-racist, gender-affirming services consistent with regionally established, culturally responsive policies and standards; and
 - A description of how funding and technical assistance will be prioritized for providers who demonstrate a commitment to serve Black, Indigenous and people of color with culturally specific and/or linguistically specific services, including programs that have the lowest barriers to entry and actively reach out to communities screened out of other programs.
- I. **Planned investments.** An articulation of programmatic investments planned, including:
- The types of housing services to be funded to address the gap analysis, including specifically:
 - Supportive housing
 - Long-term rent assistance
 - Short-term rent assistance
 - Housing placement services
 - Eviction prevention
 - Shelter and transitional housing
 - A description of the support services to be funded in tandem with these housing services;
 - A commitment to one regional model of long-term rent assistance;
 - A description of other program models for each type of service that define expectations and best practices for service providers;
 - A description of how investments by service type will be phased to increase over the first three years of program implementation as revenues grow, and how decisions will be made to scale investments by service types with funding increases and decreases over time, including a plan to ensure housing stability for program participants; and
 - A description of programming alignment with, and plans to leverage, other investments and systems such as Continuum of Care, Medicaid, behavioral health and capital investments in affordable housing.
- J. **Outcomes, reporting and evaluation.** An agreement to track and report on program outcomes annually as defined through regional coordination and with regional metrics, including:
- A description of annual outcomes anticipated. Goals will be updated annually as programming evolves and based on anticipated annual revenue forecasts. Goals may include:
 - number of supportive housing units created
 - numbers of housing placements made
 - number of eviction preventions
 - rate of successful housing retention, etc.
 - A commitment to tracking outcomes as established and defined through regional coordination and with regionally established metrics. This includes consistency in data disaggregation using regionally standardized values and methodology to understand

- disparate outcomes for people by race, ethnicity, disability status, sexual orientation and gender identity. (See Section 5.2 for the regionally required outcome metrics.)
- A commitment to regional measurable goals to decrease racial disparities among people experiencing homelessness. (See Section 5.2 for the regional measurable goals for advancing racial equity.)
 - A commitment to evaluation standards and procedures to be established through regional coordination. Evaluation will be conducted every three years and include performance of systems coordination, housing and service program types, and services provision.

Appendix E: Metro Supportive Housing Services Outcome Metrics

The following charts capture the SHS Program outcome metrics that have been established to date.

Outcome Metrics: Housing Stability

Category	Goals	Proposed Annual Metrics
Housing Stability	Housing equity advanced by access and service access at greater rates to BIPOC; Housing retention rates equal or better for BIPOC; Rate of chronic homelessness significantly reduced	# of supportive housing units created
		Rate: Total supply of supportive housing vs. demand
		Rate: # of households experiencing housing instability/homelessness compared to those placed in stable housing
		# of housing placements by housing type and population type
		# of homeless preventions by housing type and population type
		Rate: housing retention
		Average length of homelessness
		Returns to homelessness (# and %)
		Funds and services leveraged (across sectors, departments) locally

Outcome Metrics: Equitable Service Delivery

Category	Goals	Proposed Annual Metrics
Equitable Service Delivery	Increase culturally specific organization capacity with increased investments and expanded organizational reach for these organizations; All supportive housing services providers work to build anti-racist, gender-affirming systems with regionally established, culturally responsive policies, standards and technical assistance	Scale of investments made through culturally specific service providers
		Rates of pay for direct service roles & pay distribution from highest to lowest-paid staff within agencies
		Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience

Outcome Metrics: Engagement & Decision Making

Category	Goals	Proposed Annual Metrics
Engagement & Decision Making	<p>BIPOC folks are overrepresented on all decision-making and advisory bodies</p> <p>BIPOC folks and people with lived experience are engaged disproportionately (i.e. over-engaged) to inform program design and decision making.</p>	Percent of all advisory and oversight committee members who identify as BIPOC or as having lived experience of housing instability or homelessness

Appendix F

REGIONAL SUPPORTIVE HOUSING SERVICES Tri-County Data Scan



Prepared by
Kristina Smock Consulting
for



Metro

November 2020

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Introduction

In May 2020, voters approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of homelessness in Multnomah, Clackamas and Washington counties. The regional Supportive Housing Services (SHS) program will fund a range of homeless and housing services, including supportive housing, rapid rehousing, rent assistance, homelessness prevention, and wraparound clinical and social service supports.

Metro worked with its jurisdictional partners in June and July 2020 to compile baseline data from across the three counties to support regional planning for SHS implementation. County staff gathered and shared data on public funding, system capacity, outcome measures and programmatic cost estimates for homeless services in their counties. Additional information was compiled from each county's Continuum of Care applications, Housing Inventory Counts and Annual Performance Reports.

This report provides a cross-county summary analysis of the data. The analysis includes the entire scope of each county's homeless services, not just the area within Metro's service district. It offers a snapshot of the region's current homeless services landscape as a starting point to help inform further information gathering, analysis and decision making. It is intended as an internal document to support Metro and its jurisdictional partners in their SHS program planning work.

Public Funding

Each county was asked to provide data on the sources (federal, state or local) and amounts of all public funding for supportive housing, rapid rehousing, homelessness prevention, emergency shelter and transitional housing programs in their jurisdiction. The analysis in this section shows the funding data provided by each county, broken out by program area.

The public funding across all three counties totals to more than \$112 million:

Public Funding	Multnomah	Washington	Clackamas	Total
Supportive Housing	\$38,628,151	\$5,769,658	\$4,239,884	\$48,637,693
Rapid Rehousing & Prevention ¹	\$34,188,197	\$1,963,541	\$2,209,027	\$38,360,765
Emergency Shelter	\$17,041,310	\$3,016,174	\$1,337,805	\$21,395,289
Transitional Housing	\$1,333,565	\$2,045,234	\$232,726	\$3,611,525
Total	\$91,191,223	\$12,794,607	\$8,019,442	\$112,005,272

These figures primarily reflect the public funding that flows through each county's Continuum of Care and homeless services department. Counties also worked to compile data on relevant funding allocated through their local Community Action Agencies and Housing Authorities. Funding that is paid directly to service providers or reimbursed through Medicaid billing is not fully reflected in the data. None of the funding or system capacity data in the report includes COVID-related funding or programming.

The main sources of public funding captured in the data include:

Federal:

- *Housing and Urban Development (HUD)*: Continuum of Care (CoC), Housing Choice Vouchers, Project Based Vouchers, Community Development Block Grant, Housing Opportunities for Persons with AIDS, Emergency Food and Shelter Program, Emergency Solutions Grant, Family Unification Program Vouchers
- *HUD-Veterans Affairs*: Veterans Affairs Supportive Housing, Supportive Services for Veteran Families
- *Health and Human Services*: Runaway and Homeless Youth

State:

- *Oregon Housing and Community Services*: Emergency Housing Assistance, State Housing Assistance Program, Elderly Rental Assistance
- *Oregon Health Authority*: Medicaid, Medicare, State Mental Health Services Fund
- *Oregon Department of Human Services*
- *Oregon Department of Justice*

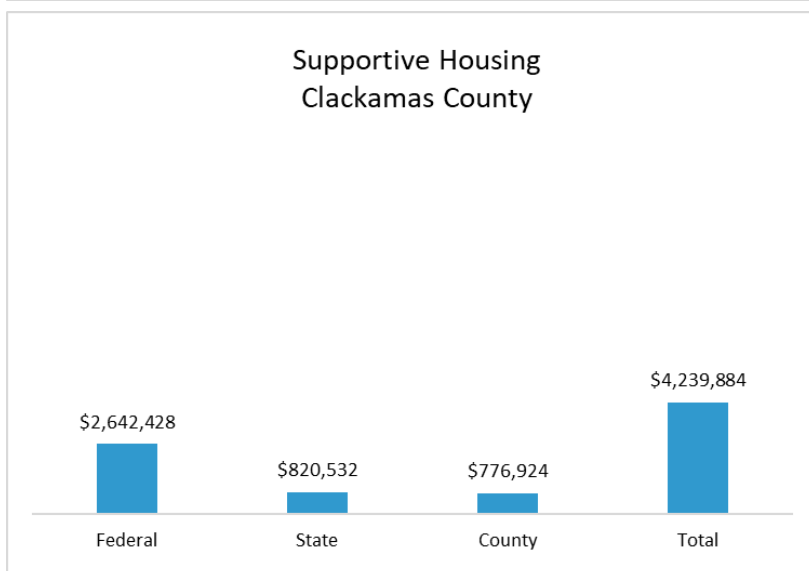
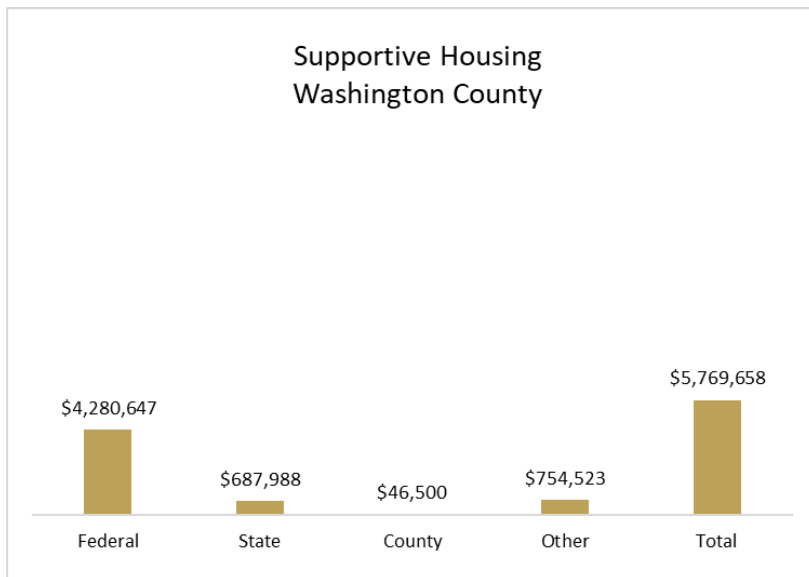
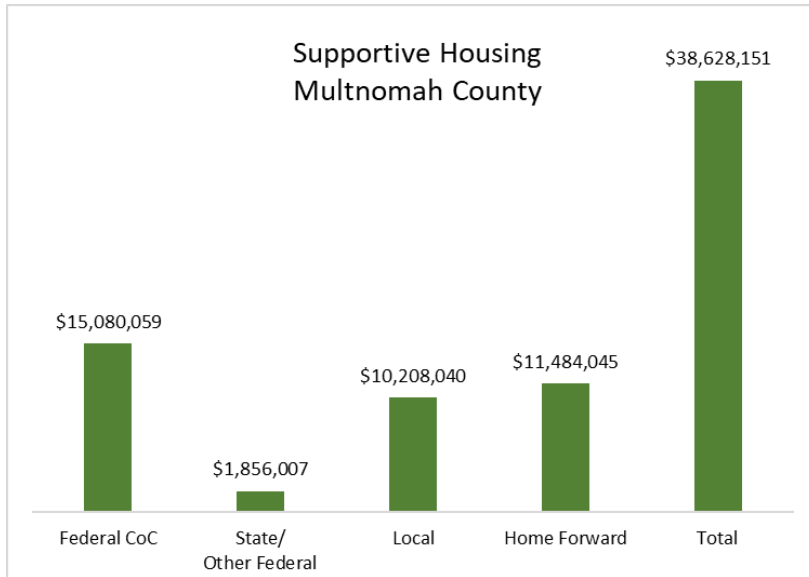
Local:

- *County*: Multnomah, Washington and Clackamas County General Funds, Washington County Safety Levy
- *City*: City of Portland General Fund

The charts on pages 5-8 show the amounts of federal, state and local funding by county for each program area.

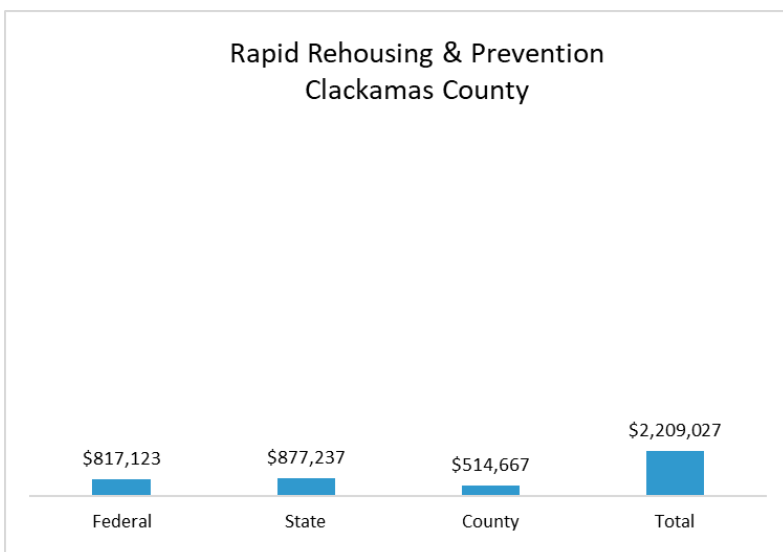
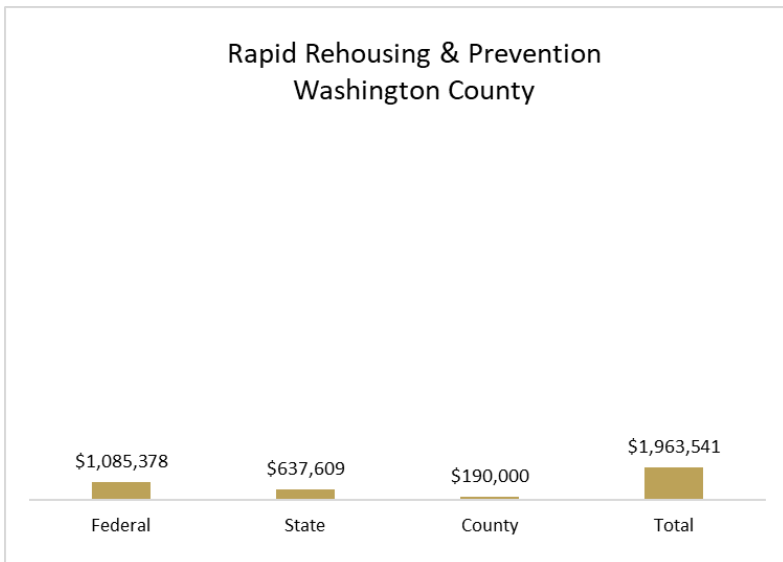
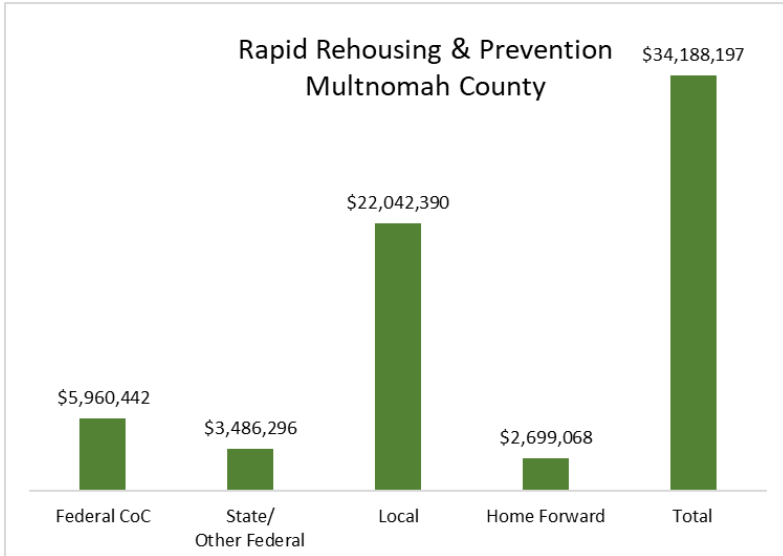
¹ Multnomah County combines rapid rehousing and homelessness prevention services into the same budget category. For consistency, funding information for these two program areas has been combined into one category for all three counties. Washington County's rapid rehousing funding is \$1,151,926 and prevention funding is \$811,615. Clackamas County's rapid rehousing funding is \$1,656,715 and prevention funding is \$552,312.

Supportive Housing



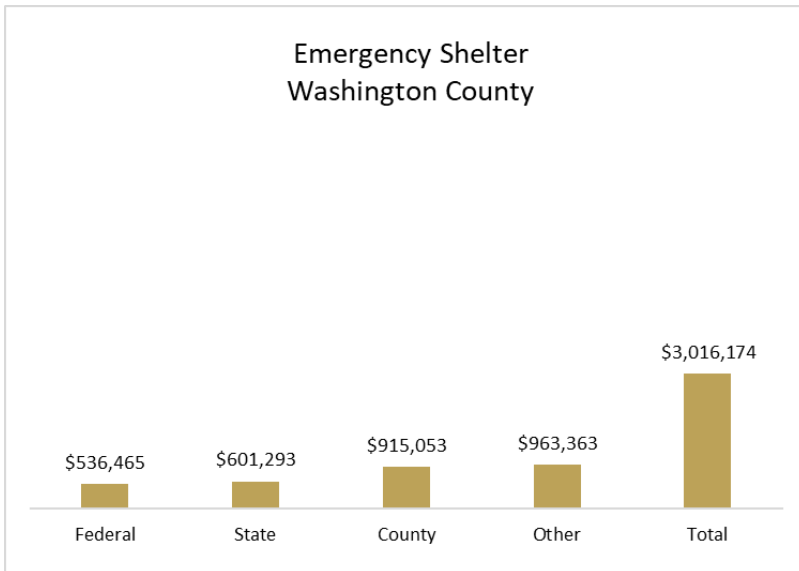
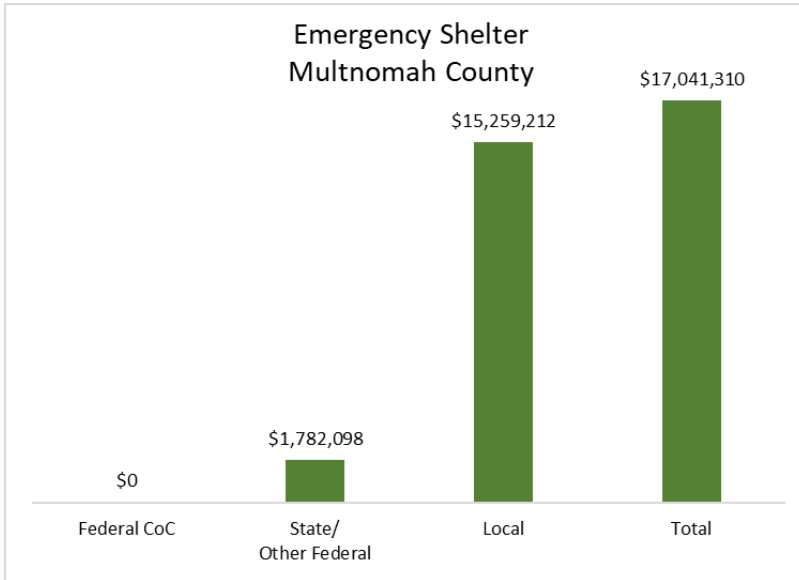
**Total Tri-County Public Funding
for Supportive Housing:
\$48,637,693**

Rapid Rehousing and Prevention

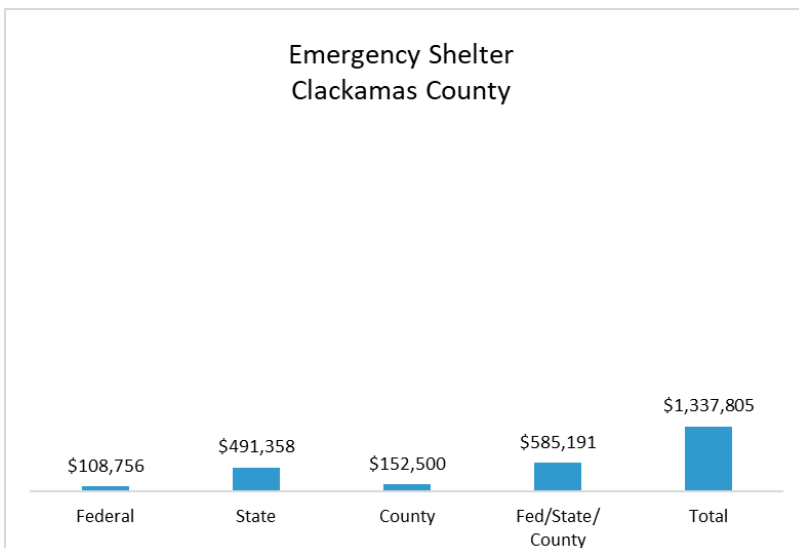


**Total Tri-County Public Funding for
Rapid Rehousing & Prevention:
\$38,360,765**

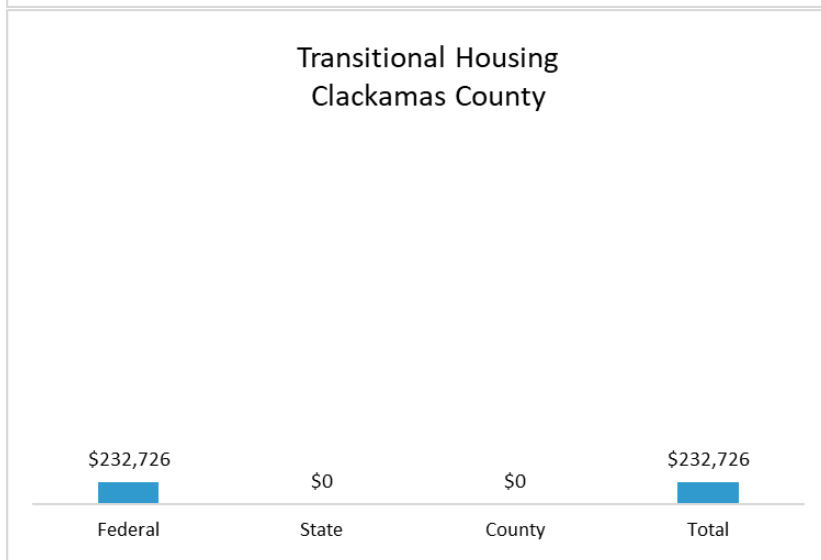
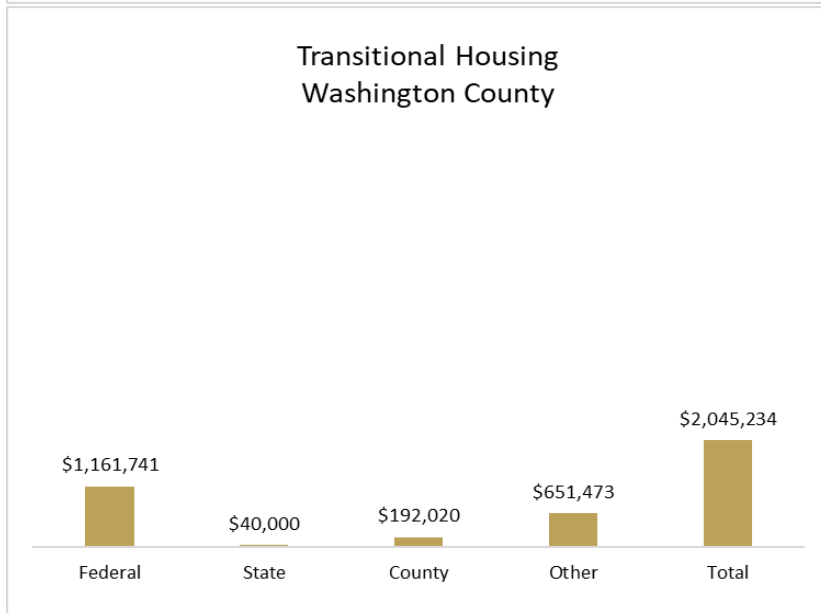
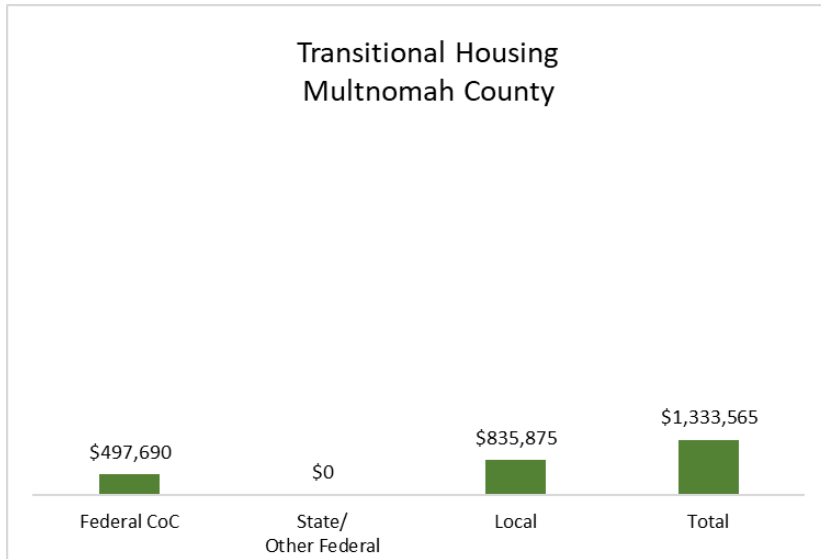
Emergency Shelter



**Total Tri-County Public Funding
for Emergency Shelter:
\$21,395,289**



Transitional Housing



**Total Tri-County Public Funding
for Transitional Housing:
\$3,611,525**

System Capacity

The regional scan of homeless service system capacity focuses on supportive housing, rapid rehousing, homelessness prevention, emergency shelter and transitional housing programs. The first part of this section summarizes bed capacity for each program area based on point-in-time data. The second summarizes the number of households served annually within each program area.

Bed Capacity (Point-in-Time Data)

The Housing Inventory Count (HIC) provides a comprehensive snapshot of each county’s bed capacity on a single night. It includes publicly funded programs as well as those that don’t receive any public funding and don’t participate in the county’s Homeless Management Information System (HMIS). The data in this section are based on each county’s 2020 HIC, which was conducted on January 23, 2020.

The HIC is a useful way to understand system capacity at a single point in time, but it also has limitations that need to be kept in mind:

- The HIC shows how many people the system can serve on a given night, but not how many people are served over the course of a year. (The section on households served provides that information.)
- The HIC doesn’t include everyone being served via rapid rehousing on a given night due to the way the data are collected, and it doesn’t include homelessness prevention programs at all.
- The HIC doesn’t systematically capture seasonal and severe weather emergency shelter beds. Those beds are included in the *Total Bed Capacity* chart below, but they are not guaranteed from year to year.

Total Bed Capacity (Point-in-Time 2020)		Multnomah	Washington	Clackamas	Total
Supportive Housing	Total beds	4947	509	401	5857
Rapid Rehousing	Total beds	2186	231	159	2576
Emergency Shelter	Year-round beds	1607	125	99	1831
	Seasonal & severe weather	284	109	209	602
Transitional Housing	Total beds	746	126	35	907

The HIC provides information on how bed capacity is allocated by certain HUD-defined sub-populations and household types on the night of the count. The allocations may shift over time, particularly for programs that are not facility based. The sub-population categories that are tracked in the HIC do not capture the full range of populations served or all of the populations that are prioritized for services by specific programs, so the insights they offer are limited. The sub-populations are not mutually exclusive, and households can be counted in more than one category.

Bed Capacity by Population and Household Type (Point-in-Time 2020)	Multnomah	Washington	Clackamas	Total
Supportive Housing Beds				
Total beds for households with children	1734	166	180	2080
Total beds for households without children	3213	343	221	3777
Beds for veteran households with children	124	117	69	310
Beds for veteran households without children	680	140	128	948
Domestic violence program beds	74	0	7	81
Unaccompanied youth beds	67	0	0	67

Bed Capacity by Population and Household Type (Point-in-Time 2020)	Multnomah	Washington	Clackamas	Total
Rapid Rehousing Beds				
Total beds for households with children	1717	211	126	2054
Total beds for households without children	461	20	33	514
Beds for veteran households with children	11	12	14	37
Beds for veteran households without children	86	7	23	116
Domestic violence program beds	265	18	21	304
Unaccompanied youth beds	181	0	3	184
Emergency Shelter Beds				
Total beds for households with children	379	117	77	573
Total beds for households without children	1297	6	22	1325
Beds for veteran households with children	0	0	0	0
Beds for veteran households without children	110	0	15	125
Domestic violence program beds	111	24	54	189
Unaccompanied youth beds	68	3	0	71
Transitional Housing Beds				
Total beds for households with children	44	39	27	110
Total beds for households without children	698	87	8	793
Beds for veteran households with children	0	27	0	27
Beds for veteran households without children	112	66	0	178
Domestic violence program beds	0	8	0	8
Unaccompanied youth beds	80	10	22	112

Households Served (Annual Data)

Data on the number of households served in each program area over the course of a year provide another lens for understanding system capacity. Compared with point-in-time data, annual data provide a more complete picture of how many people the system can serve. The data on households served also include homelessness prevention programs, which are an important part of the regional system that aren't captured in the HIC. One limitation of the data on households served is that programs that don't participate in HMIS (or don't consistently enter their program data into HMIS) may not be reflected in these data.

The data in the *Total Households Served* chart below are based on the most recently available annual data from 2019 and 2020. (The specific data years within 2019-20 vary from county to county.)

Total Households Served (Annual 2019-20)	Multnomah	Washington	Clackamas	Total
Supportive Housing	3540	393	346	4279
Rapid Rehousing	4000	135	152	4287
Prevention	3430	335	145	3910
Emergency Shelter (year-round beds)	5490	233	n/a ²	n/a
Transitional Housing	1290	206	17	1513

² Recent data on the number of households served in year-round emergency shelter for Clackamas County aren't available because one of the county's year-round shelters was demolished and rebuilt, and a full year of data aren't yet available.

The *Households Served by Population and Household Type* chart below provides data on households and people served, broken out by certain HUD-defined sub-populations and household types. These data are from each county’s Continuum of Care Annual Performance Reports (APRs) for FY 2018-19, so they are less current than the data in the *Total Households Served* chart above. APRs for FY 2019-20 are not yet available.

As with the HIC, the population categories collected and reported on in the APRs are limited and don’t capture the full range of populations that are served by the region’s homeless services system. The categories also aren’t mutually exclusive, and individuals and households can be counted in more than one category.

Households Served by Population and Household Type (Annual FY 2018-19)	Multnomah	Washington	Clackamas	Total
Supportive Housing				
Total households served	3392	385	261	4038
Households with children and adults	517	42	53	612
Households without children	2874	343	208	3425
Households with only children ³	1	0	0	1
Total persons served	4828	543	391	5762
Veterans	888	138	113	1139
Chronically homeless persons	1792	175	180	2147
Persons fleeing domestic violence	90	16	23	129
Youth under age 25	80	1	3	84
Rapid Rehousing				
Total households served	3507	115	159	3781
Households with children and adults	1151	89	129	1369
Households without children	2319	26	30	2375
Households with only children	8	0	0	8
Total persons served	6563	355	476	7394
Veterans	602	32	36	670
Chronically homeless persons	1285	14	70	1369
Persons fleeing domestic violence	359	25	47	431
Youth under age 25	393	11	10	414
Homelessness Prevention				
Total households served	2869	242	141	3252
Households with children and adults	1198	167	48	1413
Households without children	1629	75	92	1796
Households with only children	2	0	1	3
Total persons served	6501	741⁴	255	6756
Veterans	486	33	45	564
Chronically homeless persons	445	5	4	454
Persons fleeing domestic violence	127	34	4	165
Youth under age 25	264	15	21	300

³ “Households with only children” refers to households comprised only of persons under age 18, including unaccompanied minors, adolescent parents and their children, and adolescent siblings.

⁴ Additional households were served through the Emergency Food and Shelter Program.

Households Served by Population and Household Type (Annual FY 2018-19)	Multnomah	Washington	Clackamas	Total
Emergency Shelter				
Total households served	4480	231	660	5371
Households with children and adults	168	140	11	319
Households without children	4156	34	649	4839
Households with only children	92	57	0	149
Total persons served	5136	573	688	6397
Veterans	473	2	76	551
Chronically homeless persons	1501	26	146	1673
Persons fleeing domestic violence	642	54	16	712
Youth under age 25	695	93	47	835
Transitional Housing				
Total households served	1242	185	17	1444
Households with children and adults	29	32	13	74
Households without children	1207	153	1	1361
Households with only children	4	0	3	7
Total persons served	1291	278	44	1613
Veterans	350	114	0	464
Chronically homeless persons	360	14	0	374
Persons fleeing domestic violence	62	17	1	80
Youth under age 25	144	18	22	184

Outcome Metrics

The counties were asked to share the outcome metrics that they currently report on for each program area. This information was supplemented with data from the counties' Continuum of Care applications and Annual Performance Reports (APRs). This section summarizes the primary outcome metrics that are currently collected for each program area. It is intended to provide baseline information as a starting point for the development of regional outcome metrics.

Each county prioritizes specific outcome metrics for each program area (and in some cases for individual projects within a program area). There is some overlap, but there are also some outcome metrics that are only gathered by one county. The outcome metrics that are gathered consistently across all three counties are those that are required by HUD as part of the Continuum of Care reporting. This section begins with some of these shared outcome metrics and then lists additional outcome metrics that are used by individual counties (or specific projects within a county) but are not collected consistently across all three counties.

Many of the outcome metrics in this section could be disaggregated by race and other demographic data as part of regional SHS outcome reporting. Additional outcome metrics could be developed for SHS reporting that draw upon HUD-required universal data elements (UDE) that are currently collected in HMIS by all three counties. There are also opportunities to develop new outcome metrics that expand upon the HUD-required data fields.

Cross-County Outcome Metrics

These are the primary HUD-required outcome metrics that are collected consistently across all three counties. The performance data are based on FY 2018-19 APRs and FY 2019 Continuum of Care applications.

Outcome Metrics	Multnomah	Washington	Clackamas
Supportive Housing (PSH)			
% of persons served who remained in PSH or exited to permanent housing	94%	95%	94%
% of adults who gained or increased total income from entry to annual assessment or exit	46%	60%	62%
% of adults who gained or increased employment income from entry to annual assessment or exit	11%	9%	13%
% of adults who gained or increased non-employment cash income from entry to annual assessment or exit	37%	55%	53%
Rapid Rehousing (RRH)			
% of persons exiting RRH to permanent housing	91%	82%	83%
% of persons served in RRH who moved into housing	85%	75%	81%
Average length of time between RRH start date and housing move-in date, in days	36	40	43
% of adults who gained or increased total income from entry to annual assessment or exit	11%	43%	32%
% of adults who gained or increased employment income from entry to annual assessment or exit	7%	28%	19%
% of adults who gained or increased non-employment cash income from entry to annual assessment or exit	5%	23%	15%

Outcome Metrics		Multnomah	Washington	Clackamas
Homelessness Prevention (HP)				
% of persons served in HP who remained in permanent housing or exited to permanent housing		94%	99%	84%
% of adults who gained or increased total income from entry to exit		8%	3%	9%
% of adults who gained or increased employment income from entry to exit		6%	3%	6%
% of adults who gained or increased non-employment cash income from entry to exit		3%	1%	4%
Emergency Shelter (ES)				
% of persons served in ES who exited to permanent housing ⁵ (see footnote 5 for limitations of this measure)		21%	46%	3%
% of adults who gained or increased total income from entry to exit		7%	15%	7%
% of adults who gained or increased employment income from entry to exit		4%	8%	3%
% of adults who gained or increased non-employment cash income from entry to exit		3%	9%	3%
Transitional Housing (TH)				
% of persons served in TH who exited to permanent housing		60%	77%	100%
% of adults who gained or increased total income from entry to annual assessment or exit		37%	28%	63%
% of adults who gained or increased employment income from entry to annual assessment or exit		26%	17%	63%
% of adults who gained or increased non-employment cash income from entry to annual assessment or exit		12%	14%	0%
Returns to Homelessness				
% of persons who exited the homeless services system to a permanent housing (PH) destination and returned to the homeless services system in:				
<6 months	Exit was from PH (includes PSH and RRH)	9%	0%	0%
	Exit was from ES	22%	5%	5%
	Exit was from TH	9%	1%	0%
6-12 months	Exit was from PH (includes PSH and RRH)	8%	3%	3%
	Exit was from ES	11%	7%	0%
	Exit was from TH	7%	0%	0%
2 years	Exit was from PH (includes PSH and RRH)	28%	5%	3%
	Exit was from ES	45%	15%	8%
	Exit was from TH	26%	2%	0%

⁵ There are several limitations to this measure: (a) Multnomah and Clackamas have high rates of missing data on exit destinations (55% and 95%), which is a common issue for shelters that exit clients in HMIS after they do not return for a period of time; (b) some of the data, particularly for Clackamas, include warming centers that are not intended to help participants transition to permanent housing. For families with children in Clackamas (a data set that better reflects exits from year-round shelters with services), 60% exit to permanent housing (with a missing data rate of only 12%).

Additional Outcome Metrics

This section lists the metrics in addition to those in the above chart that are used by at least one county (or in some cases by specific projects within a county) to measure outcomes.

Supportive Housing
People/households newly placed or retained
Bed utilization
Housing stabilization period
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
Resource connections
Engagement in trackable onsite or offsite services
Connections to health insurance, primary care and mental health services
6-month and 12-month housing retention
Rapid Rehousing
People/households newly placed or retained
Bed utilization
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
6-month and 12-month housing retention
Prevention
People/households newly placed or retained
Prevent homelessness for extremely low and low-income households
Equitable access and participation in program by BIPOC participants
6-month and 12-month housing retention
Emergency Shelter
People/households served
Bed utilization
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
Transitional Housing
People/households newly placed or retained
Bed utilization
Participants enrolled in education program
Length of time people remain homeless
Equitable access and participation in program by BIPOC participants
System-Level Metrics
Inflow and outflow reporting

Cost Analysis

The data scan gathered information on current program costs to provide a starting point for Metro and its jurisdictional partners to work together to develop a methodology for determining SHS cost projections. The intent of the cost analysis was to better understand the range of costs for different program models as well as the factors that influence whether a specific project is at the low end or high end of the range. The analysis also aimed to assess what we can learn from the available data, and the gaps and limitations of that data, in order to provide a baseline to help inform further research and planning.

Recognizing that public funding covers only a portion of the total costs of most projects, the counties worked to gather more complete budget data for their programs. This was a significant undertaking with a short turnaround time, and the comprehensiveness of the budget data that could be collected varied by project and program area. As a result, the analysis of average costs reflects some but not all of the additional costs to programs beyond the public share. The analysis also doesn't capture providers' full administrative costs or any of the administrative costs to the jurisdictions, but those costs will need to be incorporated into SHS budget projections.

Even if the budget information for the analysis was complete, there are some inherent limitations to using current cost data to inform SHS program costs. Some existing projects are under-funded, so their budgets don't necessarily capture what it would actually cost to implement sustainable programs that reflect best practices. In addition, many projects rely on a wide array of leveraged services, some of which are not reflected in their budgets and are impossible to fully quantify. As the region scales up its programming, these leveraged services may not be able to meet the increased demand unless they are also funded.

The cost analysis has additional methodological limitations that should be kept in mind:

- Varying levels of completeness in the budget data across projects contribute to some of the variations in each county's average costs.
- Since the analysis relied on relatively small sample sizes, in some cases the average costs were distorted by a single program with disproportionately high costs related to unique features of its program model or disproportionately low costs due to incomplete budget information. When the outliers significantly skewed the averages, they were excluded from the calculations.
- Due to data inconsistencies and limitations in a few of the data sets, the analysis of average costs sometimes required the use of estimates and extrapolations.
- In a few cases, insufficient data made it impossible to develop a reasonable estimate. These are noted in the chart below with "n/a" and explanatory footnotes.

Average Costs

Cost Category	Multnomah	Washington	Clackamas
Supportive Housing			
Rent: average annual cost per unit	\$10,808	\$13,172	\$15,008
Supportive services: average annual cost per unit	\$4,775	\$10,714	\$6,914
Average total annual cost per unit (rent+services+admin)	\$17,076	\$24,886	\$23,048
Rapid Rehousing			
Rent: average annual cost per household served	\$6,207	\$4,103	\$5,232
Supportive services: average annual cost per household served	\$4,500	\$3,477	\$4,846
Average total annual cost per household (rent+services+admin)	\$12,303	\$8,029	\$11,366

Cost Category	Multnomah	Washington	Clackamas
Homelessness Prevention			
Average annual cost per household served	\$1,993 ⁶	\$2,373 ⁷	\$3,009
Emergency Shelter⁸			
Average annual cost per household served	\$3,104 ⁹	\$13,808	n/a ¹⁰
Average annual cost per bed	\$12,274	\$17,818	\$4,756 ¹¹
Transitional Housing			
Average annual cost per household served	n/a ¹²	\$11,537	\$13,690
Average annual cost per unit	n/a	\$20,928	\$19,394

Factors Influencing Costs

Within each program area, there is typically a range of costs, with some projects costing less than the average and some costing significantly more. This section summarizes the most common program-related factors that influence whether costs are at the low end or high end of the range for each program area.

It should be noted that while the factors listed in this section are important to consider when planning for future program costs, some projects were on the low end of the cost range for this analysis because the available cost data did not include the project's full costs.

Supportive Housing

- Household type and size
- Acuity of need of population served
- Service model – e.g. Intensive Case Management and Assertive Community Treatment are more expensive than support services that primarily focus on connecting tenants to other resources
- Availability of clinical services – these services are often not reflected in the project's budget data if they are provided by partners or funded through Medicaid billing, but they affect the overall costs
- Availability of flexible funding to cover direct costs for specific services tailored to each household
- Staff to client ratios – underfunded programs often have ratios that are higher than best practice guidelines, which can limit the effectiveness of the supportive services
- Operating model – e.g. upfront costs for developed units are higher than for leased units, but ongoing costs are lower; services are more expensive to provide at scattered sites than a single site

Rapid Rehousing

- Household type and size

⁶ This figure is a rough extrapolated estimate due to limited data.

⁷ This estimate excludes one outlier program with an average cost per of \$41,352 per household; if that outlier is included in the estimate, the average cost is \$8,870.

⁸ A goal for this analysis was to determine an average cost for housing placements out of shelter, but that wasn't possible for several reasons: (a) funding to support housing placement out of shelter is often budgeted as rapid rehousing and isn't part of the shelter budget; (b) there is a high percentage of missing data on housing placements out of shelter, as noted earlier in this report; (c) not all shelters are designed or funded to support housing placement.

⁹ Due to limited data, this figure is only based on public costs for emergency shelter.

¹⁰ Insufficient data were available to calculate average costs per household for emergency shelter for Clackamas County.

¹¹ Due to limited data, this is a rough extrapolated estimate that reflects the average operating costs of church-run shelters combined with the average public cost for case management.

¹² Insufficient data were available to calculate average costs for transitional housing for Multnomah County.

- Acuity of need of households served
- Length and intensity of housing retention support and wrap-around services provided
- Staff to client ratios
- Average length of service

Prevention

- Household type and size
- Level and duration of rent assistance provided
- Level of other financial assistance provided
- Availability and level of case management or other support services
- Average length of service

Emergency Shelter

- Household type and size
- Acuity of need of population served
- Operating model – e.g. shelters on church property run by volunteers are less costly (but also more limited) than facility-based shelters
- Availability and level of case management or housing placement support
- Type of programming – e.g. domestic violence and youth shelters often have higher costs than those without such specialized services

Transitional Housing

- Household type and size
- Acuity of need of population served
- Operating model – e.g. facility-based vs. scattered site transition-in-place
- Type and level of case management and programming provided
- Average length of service

Comparisons to Other Available Cost Data

Supportive Housing

Corporation for Supportive Housing (CSH) Estimates

Nationally, CSH calculates average costs for tenancy support services at \$7,200 per household per year, with costs ranging as high as \$17,000 for Assertive Community Treatment services. For the 2019 tri-county CSH report,¹³ CSH worked with local stakeholders to develop an estimated annual service cost of \$10,000 per household based on a survey of actual costs from a sample of local providers. The estimate is based on a ratio of one case manager to 10 clients for scattered site and one case manager to 15 clients for single site. It also includes flexible service funding for direct costs not covered by community-based and Medicaid-paid services.

Average annual costs per household		Individuals	Families
Supportive Services		\$10,000	\$10,000
Rent Assistance	Private market unit	\$13,000	\$19,600
	Regulated affordable housing unit	\$7,000	\$7,000

¹³ “Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness.” Corporation for Supportive Housing. 2019.

CSH’s cost estimate for rent assistance for private market units is based on HUD’s 2018 fair market rents (FMR) and does not include the gap between FMRs and actual rental costs in the market. The estimate for regulated affordable housing units is based on costs from a sample of local projects.

Portland State University (PSU) Estimates

PSU’s Homelessness Research and Action Collaborative’s 2019 report¹⁴ provides cost estimates that are similar to CSH’s but are based on cost ranges rather than a single figure for each cost category:

Average annual costs per household		Individuals	Families
Supportive Services		\$8,800-\$10,000	\$8,800-\$10,000
Rent Assistance	Private market unit	\$11,352-\$18,960	\$14,904-\$41,000
	Regulated affordable housing unit	\$6,000-\$8,000	\$6,000-\$8,000

The low end of PSU’s service cost estimates is based on an analysis of Multnomah County’s spending dashboard; the high end is based on CSH’s estimate. PSU’s rent assistance cost estimate for private market units is based on HUD’s 2017 FMR and hypothetical small area FMR zip code max as well as Portland’s 2017 State of Housing report. The regulated affordable housing unit estimate is based on CSH’s estimate and Multifamily NW’s 2019 Apartment Report.

Rapid Rehousing

HUD’s Family Options Study,¹⁵ which is one of the most rigorous national studies of housing interventions for homeless families, found the average monthly cost per household of rapid rehousing was \$880, which translates into an annual cost of \$10,560. (Actual annual costs per household would be lower since not all households served in a given year receive 12 months of services.) Housing costs constituted 72% of the total average costs while supportive services constituted 28%.

Prevention

A HUD study of the Homelessness Prevention and Rapid Rehousing Program¹⁶ found an average cost of \$897 per person and \$2,252 per household for homelessness prevention assistance. Financial assistance (including rent assistance, utility payments and moving costs) constituted 73% of average costs while supportive services constituted 27%.

Emergency Shelter

HUD’s Family Options Study found an average monthly per household cost of \$4,819 for emergency shelter, which translates into an annual cost of \$57,828. Actual annual costs per household served would be lower since few households remain in emergency shelter for 12 months, but the annual cost estimate provides a proxy for the annual operating costs of shelter space for one family. Supportive services made up 63% of the average costs, and shelter costs made up 37%.

Transitional Housing

HUD’s Family Options Study found an average monthly per household cost of \$2,706 for transitional housing, which translates into an annual cost of \$32,472. The annual cost estimate provides a proxy for the annual operating costs of one unit of transitional housing for families. Supportive services constituted 42% of program costs, on average, and housing costs constituted 58%.

¹⁴ “Governance, Costs, and Revenue Raising to Address and Prevent Homelessness in the Portland Tri-County Region.” Portland State University. 2019.

¹⁵ “Family Options Study: 3-Year Impacts of Housing and Services Interventions for Homeless Families.” HUD. 2016.

¹⁶ “Homelessness Prevention and Rapid Re-Housing Program (HPRP): Year 3 & Final Program Summary.” HUD. 2016.

Potential Next Steps

This initial cost analysis offers a starting point for SHS cost planning that will need to be supplemented with additional research. Possible next steps could include:

- Asking a sample of service providers representing a range of models in each program area to provide full budget data for their programs to support a more complete analysis of costs.
- Working with service providers to identify what it would actually cost to implement their programs with fidelity to best practices.¹⁷
- Determining the proportion of housing units within each relevant program area that will be developed vs. leased in order to more accurately estimate housing costs.
- Applying an annual inflation factor to all costs to more accurately project SHS costs over time.¹⁸

¹⁷ For example, CSH's Services Staffing and Budget Tool enables supportive housing providers to combine actual program data with best practice guidelines to develop cost estimates: <https://cshcloud.egnyte.com/fl/KibC8XSZTs#folder-link/>.

¹⁸ The CSH tri-county report suggests using inflation factors of 1.5% for operating costs, 1.5% for rental assistance, and 2% for services.

Appendix G



Housing Authority of Clackamas County **Community Engagement Report – Phase One** **Within Metro Boundary Fall 2020**

Prepared by Coalition of Communities of Color 1/4/2021

Outline of Report

- Purpose/Introduction
 - Summary of the project
 - Summary of community engagement (survey & focus groups)
 - Role of UNITE
 - Role of CCC
- Demographic Summary
 - Community survey
 - Focus groups
- Overview of Community Engagement Findings
 - What does houselessness look like in your community?
 - How is houselessness talking about and perceived in your community?
 - Programmatic and strategic shortcomings
 - Barriers to access housing services
 - BIPOC-specific concerns
 - Valued Services
- Recommendations
- Appendix – Notes

INTRODUCTION

This report summarizes the findings from a community engagement process to ensure that typically underrepresented communities will inform the Local Implementation Plan for allocating Supportive Housing Funds in Clackamas County. Phase one (within Metro Urban Growth Boundary) of this project included organizing three focus groups in November and December 2020 and circulating a community survey. The focus group curriculum and survey questions were collaboratively developed by the Coalition of Communities of Color (CCC), Unite Oregon, and the Housing Authority of Clackamas County (HACC). Representatives from each agency met regularly to discuss strategies for community engagement and share progress updates and data across agencies.

Unite Oregon's role for Phase one included conducting community outreach and recruitment for focus groups, funding participant stipends for focus groups and survey, contracting community

organizers, and ensuring all translations and interpretation needs. CCC's role for Phase 1 included:

- Providing feedback on focus group and survey methodologies
- Note-taking during focus group meetings
- Analyzing and summarizing data from focus group meetings and the community survey

This report includes demographic details of focus group participants and survey respondents. Following the demographic section, we summarize the main findings from the qualitative data provided to us in the form of notes from the focus groups and open-ended responses from the community survey. After briefly discussing the methodology for analyzing these qualitative data, we present five themes that emerged from the data, including:

- (1) Visualizing Housing Insecurity
- (2) Perceptions of Housing Insecurity and Houselessness
- (3) Shortcomings of Housing Programs and Services
- (4) BIPOC Specific Concerns
- (5) Valued Services

The report concludes with recommendations suggested by focus group participants and survey respondents. These recommendations are organized into three broad themes, including: (1) Population Specific Recommendations; (2) Infrastructure and Service Improvement Recommendations; (3) Advocacy and Policy Recommendations.

DEMOGRAPHIC SUMMARY

Focus Groups

UNITE Oregon organized three focus group meetings via Zoom in November and December 2020. In total, 34 people participated in focus group discussions. The three focus groups included:

- 1 Spanish language (n=10)
- 1 English language, BIPOC focus (n=10)
- 1 for Social Service Providers (in English) (n=14)

All 34 participants shared their gender identity. Respondents could choose from the following gender identities: Woman, Man, Non-binary, Prefer Not to Say, Not Relevant to My Community.

Table 1: Gender Identity (Focus Groups)

Woman (n=21)	Man (n=13)
62%	38%

Focus group participants were asked to share with what community they identified. Thirty-three respondents shared that they belong to one community, while one respondent shared belonging

to more than one community (i.e., racial/ethnic and LGBTQ+). This is why percentages do not add up to 100.

Table 2: Community (Focus Groups)

AAPI/Asian (n=6)	Middle Eastern (n=5)	Black/African American (n=5)	Latinx (n=17)	LGBTQ+ (n=2)
18%	15%	15%	50%	6%

Focus group participants were asked to share their age. Twenty-nine participants responded.

Table 3: Age (Focus Groups)

18-24 (n=3)	25-34 (n=10)	35-44 (n=8)	45-54 (n=6)	55-64 (n=2)
10%	34%	28%	21%	7%

Focus group participants were asked to share their housing status. Participants self-reported their answers. 18 participants responded to this question.

Answers to this question include:

- “Rent,” “Renting,” or “Rental” (n=11)
- “Homeowner,” “have a home” (n=2)
- “Stable” (n=1)
- “Low-income housing” (n=1)
- “Good” (n=1)
- “Bad” (n=1)
- “Vivo con familiares” (n=1)

Community Survey

UNITE Oregon developed a community survey in collaboration with HACC and CCC. In total, ten respondents filled out the survey, although not all respondents answered all demographic questions.

All ten respondents shared their gender identity. Respondents could choose from the following gender identities: Women, Man, Non-binary, Prefer Not to Say, Not Relevant to My Community.

Table 4: Gender Identity (Community Survey)

Woman (n=6)	Man (n=4)
60%	40%

Survey respondents were asked to share with what community they identified. Nine respondents answered this question, and they could choose more than one community, which is why percentages do not add up to 100.

Table 5: Community (Community Survey)

Black/African American (n=3)	Latinx (n=5)	Indigenous (n=1)	Asian (n=1)	European (n=1)	LGBTQ+ (n=1)
33%	56%	11%	11%	11%	11%

Survey respondents were asked to share their age. 10 respondents answered the question.

Table 6: Age (Community Survey)

18-24 (n=2)	25-34 (n=3)	35-44 (n=3)	45-54 (n=2)
20%	30%	30%	20%

OVERVIEW OF COMMUNITY ENGAGEMENT FINDINGS

Methodology

The open-ended responses in the community survey and the notes taken at all three focus group meetings were analyzed qualitatively using Atlas.ti software. We started with a process of open-ended coding, or in other words, we developed categories that captured important aspects of every response. These open-ended codes were then grouped into overarching themes. These themes are presented below.

1. Visualizing Housing Insecurity

Survey and focus group participants were asked to share what housing insecurity and houselessness looks like in their communities. Many respondents shared that houseless folks stay in tents and encampments at various locations across Clackamas County, including along highways and below underpasses, in parks, around rivers and forests, and near mountains. Others mentioned that housing insecurity could look like couch surfing, staying at rest stops, living in cars, and older youth staying at friends' homes.

“I also have friends who are living in their cars, but we cannot help them because we barely fit in our place.” (Focus group)

Also, there is a need to understand housing insecurity and houselessness in more expansive ways. Many respondents felt that specific populations remain unseen or hidden from understanding who experiences housing insecurity. For instance, housing insecurity should also

include those living in overcrowded housing, facing eviction, and living in motels/hotels. Housing insecurity can also be experienced by someone in an abusive relationship since often they remain in a tenuous situation for fear of losing housing and for children's stability. One respondent mentioned the "working homeless," or individuals or families that earn too much to be eligible for assistance but do not earn enough to afford their housing.

"We have college professors, social workers, college-educated, single adults without children who have housing insecurities that are not always at the forefront of this issue." (Community Survey)

A focus group participant addressed the specific housing challenges experienced by single mothers who are in recovery.

"In order to establish housing, many in recovery need to put minor children in [the] system or with [a] relative. [There is] trouble finding housing with children, [and they] have to bring them in later. [This is] particularly challenging for single moms getting clean." (Focus group)

2. Perceptions of Housing Insecurity and Houselessness

Survey and focus group participants were asked to share how housing insecurity and houselessness is perceived in their communities. Several respondents shared that they have noticed that houselessness is better understood, more people are aware of it, and more people comprehend its complexities.

"There are people within the community who understand the complexities of housing loss and view housing as a natural right and basic need that everyone is entitled to." (Community Survey)

"Visibility in Clackamas County around homelessness services or about the existence of the problem has increased (at the County level, at least)." (Focus group)

However, respondents also shared that many folks perceive housing insecurity and houselessness in Clackamas County as an outgrowth of Portland's housing crisis. As a consequence, many folks assume that there are few local reasons for housing insecurity and houselessness. One respondent stated that Clackamas County residents would benefit from more education that explains how houselessness is a local community issue and challenge.

The majority of respondents shared that housing insecurity and houselessness is perceived negatively in their communities. Houselessness is perceived to be connected to trash, theft, and blamed for why places look "dirty." Many assume that houselessness is an outcome of individual flaws and failures and a byproduct of poor decisions and laziness.

“Others in the community view homelessness as an individual flaw or defect, the deserved consequence from a series of poor decisions. Homelessness is talked about as a byproduct of lazy people whose very existence lowers the value of their property and the beauty of their community.” (Community Survey)

3. Shortcomings of Housing Programs and Services

Survey and focus group participants were asked, “Where do current housing programs or strategies fail?” By far, the most commonly stated shortcoming of housing programs and services was lack of capacity. Respondents discussed the many ways, due to lack of capacity, that programs and services failed to:

- Serve the number of people who need help
- Hire enough case managers
- Provide long-term housing solutions
- Conduct meaningful, culturally specific community outreach
- Build strong relationships and foster trust with communities
- Address lengthy waitlists
- Offer local services, especially in rural parts of the county

“We had a man who was illiterate and was asking for us to fill out his job application. We found a woman who worked for the county who was willing to help this man one on one, and because we could not help him, right there, right then, he walked away and never came back.” (Community Survey)

Another theme that emerged from the survey and focus group discussions was the high barriers that prevent many people from accessing services. Barriers to access services include:

- Lack of information about services and programs, especially in rural areas and culturally and linguistically specific formats.
- Too many requirements. This includes complex documentation, the need to have official identification, and the need to access phones and the internet to meet appointments.

Finally, many respondents shared that even though the demand for housing security is high, there is a lack of shelters and affordable housing to meet the demand.

4. BIPOC Specific Concerns

While survey respondents and focus group participants were specifically asked how programmatic shortcomings and failures affect marginalized communities (Black, Indigenous, people of color, immigrants, refugees, and/or asylum-seekers), many respondents shared BIPOC specific challenges and concerns throughout the survey and focus group discussions.

A majority of respondents shared that the lack of culturally and linguistically specific services, organizations, informational materials, and outreach create barriers to access that are specific to BIPOC communities.

“It would be better if we had more community centers for BIPOC folks because the ones in our community do not make me feel comfortable.” (Focus group)

“the Spanish translation may not have been the same as what was convey[ed] in English -- feels like they are missing information.” (Focus group)

“People are not always knowledgeable about the language around getting help/getting involved in the system, which is an equity issue for BIPOC communities.” (Focus group)

Immigration status and the barriers associated with the lack of documentation or having family members undergoing immigration proceedings were discussed as significant concerns for BIPOC communities, immigrants, refugees, and asylum-seekers. Immigration status was stated as to why many do not seek housing assistance or are denied aid when they apply. Furthermore, people in the asylum system commonly need lengthier periods of assistance until they qualify for a work permit; however, assistance programs may not cover the longer time period needed.

“In the Latinx community, it is not uncommon to have families in the program where an adult has asked for asylum. When someone is asking for asylum, their level of support and financial need will be longer as they are unable to work until they have been given a work permit.” (Community Survey)

“Most people in my community do not ask for help to seek housing opportunities, due to not being legally in the country but are mothers of us citizens.”
(Community Survey)

“Immigrants don’t always qualify for government help, and there is not enough aide [sic] for the amount of people that need it.” (Community Survey)

Other BIPOC specific concerns that were mentioned include:

- Overall greater need for assistance to meet basic needs (e.g., housing, employment, food, etc.) due to the barriers created by systemic racism
- More experiences of discrimination with landlords
- Mistrust of service providers and government institutions due to lack of culturally sensitive community outreach
- Need to address mental health stigma in many BIPOC communities

“No community relationship with participants results in mistrust of service system.” (Community Survey)

“Trusting government institutions is not always easy when there is trauma that runs through these communities.” (Community Survey)

“When it comes to undocumented folks, there is an intersection of various issues - for example, mental health is an existing issue and the stigma around using services has been exacerbated with COVID.” (Focus group)

5. Valued Services

Survey and focus group participants were asked, “What social services do you currently value and why?” Below are the top five services that respondents felt are most valued (to how many times the service was mentioned in the survey and focus group discussions).

1. Food Services: Food subsidies including WIC and EBT, pantries, meals, and food delivery
2. Rapid Rehousing
3. Shelter Services: Including drop-in centers and emergency warming shelters
4. Outreach: Including street outreach and community outreach
5. Health Care Services: Including culturally specific counseling services and hygiene services (e.g., showers)

Some respondents specifically named certain programs and organizations that they valued. These include Rent Well, Second Chance Homes, DevNW, and churches.

RECOMMENDATIONS

The recommendations listed below are thematically organized based on what survey respondents and focus group participants shared.

Population Specific Recommendations

- More culturally specific services that understand cultural nuances and complexities of BIPOC families
- Increase resourcing to community-based, culturally-specific nonprofit organizations because they are already viewed as trusted partners by community members
- More services in rural areas
- More support for women

“I worry most about vulnerable groups like women and children. I would like it to be easier for folks like them to get a referral to rent an apartment.” (Focus group)

“Work with women who would like to see group home options where single moms can bring kids and live with 4-5 families that they trust.” (Focus group)

- Focus on youth outreach and youth organizing, especially in immigrant and refugee communities

“Immigrant families heavily rely on their children in terms of translating, getting information - since there is inherent trust there, this avenue should be used for outreach and communication (youth, social media, etc.). School emails, virtual workshops, and other things targeted towards young adults could be helpful.” (Focus group)

- More representation of those who have experienced homelessness inside agencies
- More assistance for single men

Infrastructure and Service Improvement Recommendations

- More permanent supportive housing
- More triage social services
- Increase shelter capacity
- More trauma-informed care and training
- More information about where to go to access services
- More locally accessible information about housing services

“thinking about where BIPOC communities are (closer to the Multnomah boundary, Milwaukie, etc.) - ideal place to provide accessible resources.” (Focus group)

“places like Canby have a large Latino population that needs resources from Clackamas County. It is important to have equal focus on more obvious places and the not-so obvious places.” (Focus group)

- Integration of nonprofits and hubs for coordinated access/entry to housing services
 - “It would be great to see culturally specific nonprofits plugged into main hubs of coordinated access/entry to these services.” (Focus group)

Advocacy and Policy Recommendations

- Create advocacy groups, especially in Estacada, Sandy, Molalla
- Universal Basic Income

APPENDIX NOTES

Community Survey & Focus Groups

Themes from open-ended questions & focus group discussions

How is homelessness visualized/what does it look like in your community?

- Need for more expansive understanding of homelessness
 - Housing insecurity as seen and unseen/hidden
 - Mainstream perceptions of housing insecurity are largely camps and tents, but housing insecurity should also be understood as living in an overcrowded place, facing eviction, or living in a motel.
 - Housing insecurity is also when someone stays with an abusive relationship because of fear of losing housing and stability for children.
 - “not taking into account the “working homeless” - those individuals/families that make too much for resources but not enough to afford housing on their own.”
- Trust: people choosing to remain homeless
 - “A lot of people choose to remain homeless, they don’t trust govt/four wall.”
- Story: “ i’ve seen so many Latinx folks outside of the Mexican stores begging for money. We ask them, “do you have any help from an agency to get a house?” We refer them to a church, but they don’t always help beyond information in the ways they need it.”
(Focus group)
- Families living together in crowded spaces
 - “a lot of families in my Latino community living a lot of people in a single small house.”
- Cars
 - “I also have friends who are living in their cars, but we cannot help them because we barely fit in our place.” (Focus group)
- Couch surfing
- Rest stops
- Older youth staying a friends’ houses
- Tents/encampments
- Specific challenges for single mothers
 - “In order to establish housing, many in recovery need to put minor children in system or with relative, trouble finding housing with children, have to bring them in later; particularly challenging for single moms getting clean.” (Focus group)

The ways houselessness is discussed and perceived

- People know more about it, and some understand its complexities
 - “There are people within the community who understand the complexities of housing loss and view housing as a natural right and basic need that everyone is entitled to.”

- “Visibility in Clackamas County around homelessness services or about the existence of the problem has increased (at the County level, at least).” (Focus group)
- Most report that folks in their community discuss and perceive houselessness negatively
 - “Not having a home is still largely looked down upon by many of my neighbors. The things I hear them complain about most are perceptions of trash and theft.”
 - “Others in the community view homelessness as an individual flaw or defect, the deserved consequence from a series of poor decisions. Homelessness is talked about as a byproduct of lazy people whose very existence lowers the value of their property and the beauty of their community.”
 - “Everyone I’ve come in contact with talks down on those who are homeless and blames them for places that look ‘dirty’.”
- Houselessness in Clackamas is perceived as an outgrowth of what is happening in Portland -- there is a lack of understanding or accountability for local reasons for homelessness. Need more education about why homelessness is a Clackamas County issue

Programmatic and/or strategic shortcomings

- Lack of capacity
 - “Current housing programs do not have the capacity to help the amount of people that need help.”
 - Story: “We had a man who was illiterate and was asking for us to fill out his job application. We found a woman who worked for the county who was willing to help this man one on one and because we could not help him, right there, right then, he walked away and never came back.”
 - Not enough case managers
 - “Don’t really help people get out of homelessness but instead just help them for the day.”
 - “Individuals end up waiting for an unknown amount of time and it is frustrating to have to let people down/not being able to do anything.” (Focus group)
 - Not enough outreach
 - Not enough culturally specific outreach
 - Lack of outreach and strong community relationships results in mistrust
 - Lack of local services
 - “Went to get info in Portland - 35-40 minutes away from me; would be good to have place closer to me.” (Focus group)
 - Waitlists
- High barriers to receive services. Barriers include:
 - Lack of information about services/programs
 - “difficult to know where to start.”
 - “Rural areas do not hear about services.”
 - Too many requirements
 - Documentation

- Difficult keeping appointments (connected with having essential resources like a phone, leading to missed appointments)
- Lack of needed infrastructure even though demand is high
 - Not enough shelters
 - Not enough affordable housing units

Barriers to finding housing

- Not enough assistance/capacity can deter many from seeking aid
 - Story: “We had a man who was illiterate and was asking for us to fill out his job application. We found a woman who worked for the county who was willing to help this man one on one and because we could not help him, right there, right then, he walked away and never came back.”
 - “there is not enough aide for the amount of people that need it.”
- Folks who are houseless or housing insecure don’t always have access to essential resources.
 - “not having access to a cell phone that works regularly, so when they are to get a call back from a service provide[r], they often miss that call.”
 - Not having ID
- Not meeting income criteria for low-income housing
 - “One persistent problem I see is that when a patron or community member's housing becomes threatened, those with low income levels applications are not accepted for the few apartment rentals in the area due to income requirements. I have heard from these people, that they are willing to pay and can pay the rent, but due to the restrictions (i.e. not more than 35% of your income can go to rent) that they are not allowed to rent from these places.”
 - “Too often some people of color are working under the table and don't have reportable income which is a barrier when applying for housing.”
- Lack of information about where to seek help
 - “difficult to know where to start.”
 - “Rural areas do not hear about services.”
 - “I think it’s difficult for homeless folks to find ways to get this information.” (Focus group)
-

BIPOC-specific concerns

- Discrimination by landlords
- Lack of translations, either in person or of materials
 - “the spanish translation may not have been the same as what was convey in english - feels like they are missing information” (Focus group)
- Lack of culturally specific programs and cultural sensitivity to working with BIPOC families

- “It would be better if we had more community centers for BIPOC folks because the ones in our community do not make me feel comfortable” (Focus group)
- “I would relate more to folks who looked like me/feel comfortable or another BIPOC person.” (Focus group)
- Programs are too short-term or rigid
 - “In the Latinx community, it is not uncommon to have families in the program where an adult has asked for asylum. When someone is asking for asylum, their level of support and financial need will be longer as they are unable to work until they have been given a work permit.”
- Systemic racism means its harder to get documentation, employment
- Level of need is greater
- Immigration status is a huge barrier - no papers, then no services
 - “Most people in my community do not ask for help to seek housing opportunities, due to not being legally in the country but are mothers of us citizens.”
 - “Immigrants don’t always qualify for government help and there is not enough aide for the amount of people that need it.”
- Mistrust
 - “No community relationship with participants results in mistrust of service system.”
 - “Trusting government institutions is not always easy when there is trauma that runs through these communities.”
- Lack of culturally and linguistically specific/appropriate resources
 - “People are not always knowledgeable about the language around getting help/getting involved in the system, which is an equity issue for BIPOC communities.” (Focus group)
- Need to address stigma, especially around mental health
 - “When it comes to undocumented folks, there is an intersection of various issues - for example, mental health is an existing issue and the stigma around using services has been exacerbated with COVID.” (Focus group)

Valued services (include list)

Recommendations:

- More assistance for single men
- More permanent supportive housing
- Creating advocacy groups, especially in Estacada, Sandy, Molalla
- More social services that offer to triage many needs at the point of when someone asks
- More services in rural areas
- More culturally specific services that especially understand cultural nuances/complexities of BIPOC families
- More culturally specific organizations
- “thinking about where BIPOC communities are (closer to the Multnomah boundary, Milwaukie, etc.) - ideal place to provide accessible resources.” (Focus group)

- “places like Canby have a large Latino population that needs resources from Clackamas County. It is important to have equal focus on more obvious places and the not-so obvious places.” (Focus group)
- Seems there is more trust in community-based, culturally-specific nonprofit organizations as being places where services can be accessed -- more than churches or religious organizations/community centers
- More information about where to go to access services
- Solutions specific to women and children:
 - “I worry most about vulnerable groups like women and children. I would like it to be easier for folks like them to get a referral to rent an apartment.” (Focus group)
 - “Work with women who would like to see group home options where single moms can bring kids, and live with 4-5 families that they trust.” (Focus group)
- Trauma-informed care and training
- Youth outreach and youth organizing, especially to immigrant/refugee communities
 - “Immigrant families heavily rely on their children in terms of translating, getting information - since there is inherent trust there, this avenue should be used for outreach and communication (youth, social media, etc.). School emails, virtual workshops, and other things targeted towards young adults could be helpful.” (Focus group)
- Integration of nonprofits and hubs for coordinated access/entry to housing services
 - “It would be great to see culturally specific nonprofits plugged into main hubs of coordinated access/entry to these services.” (Focus group)
- More representation of those who have experienced homelessness
- Increase shelter capacity
- More accessible information about housing services
- Universal Basic Income

Appendix H

Housing Authority of Clackamas County and Corporation for Supportive Housing Outreach and Engagement Report

The Housing Authority of Clackamas County (HACC) contracted Corporation for Supportive Housing (CSH) to partner with staff on outreach and engagement efforts around the Supportive Housing Services program. Presentations were given to local jurisdictions and seventeen listening sessions with service providers, advisory boards, committees, and members of the general public, were held. Data was also collected from an anonymous online survey.

Below is a list of jurisdictions who participated in a formal presentation about the Supportive Housing Services measure:

- Oregon City
- West Linn
- Sandy
- Wilsonville
- Lake Oswego

Calendar of Events for HACC and CSH Engagements

Joint HACC and CSH lead outreach and engagements were hosted virtually, with a short presentation on the measure, followed by a listening session.

A calendar of events and a summaries of themes for each question are provided below.

8/6/20	Clackamas County Outreach Connections <i>Homeless Service Provider Resource Networking Group</i>
10/22/20	YHDP Strategic Planning Group <i>Youth Homelessness Demonstration Project Leadership Group</i>
10/14/20	North Clackamas Community Connect <i>North Clackamas networking group of service providers, churches, and community members to identify community needs, facilitate equitable solutions, and share updates on programs</i>
10/27/20	Emergency Medical Services Council (EMSC) <i>Advises Commissioners and the County Health, Housing and Human Services Department in matters relating to emergency medical response and ambulance services.</i>
10/27/20	Clackamas County Early Childhood Community Council (CCECC) <i>Supports and advises the Clackamas County Early Learning Hub Council and improves the early learning system by creating more effective means of coordinating services across disciplines.</i>
10/27/20	Mental Health and Addiction Council <i>Serves as an advisory body to the Clackamas County Board of County Commissioners and Director of Clackamas County Behavioral Health on community needs, gaps in</i>

	<i>services, barriers, and priorities related to providing mental health and addictions services in the county.</i>
10/28/20	Continuum of Care (CoC) <i>A group of individuals and organizations with the common purpose of planning a housing and services continuum for people who are homeless (established to fulfill a HUD requirement that allows the county to receive federal CoC funds).</i>
10/28/20	Family Violence Coordinating Council <i>A multi-disciplinary group of organizations working collaboratively to prevent and respond to domestic violence in Clackamas County, Oregon.</i>
10/28/20	Clackamas County Youth Action Board (YAB) <i>Advocates for youth who are experiencing housing instability by collaborating on youth-driven solutions that empower young people to exercise their rights, utilize community resources, and to bring issues around youth housing instability and its effects to the public eye, through outreach, engagement, and education.</i>
11/4/20	Community Action Board (CAB) <i>Advocates both locally and at the state level on issues related to people and households with low incomes.</i>
11/16/20	Clackamas County Weatherization and Energy Education Program <i>Provides free weatherization services to income-eligible residents in Clackamas County.</i>
11/16/20	Prescription Opioid Task Force <i>Multidisciplinary group working to decrease opioid misuse and harms by coordinating efforts.</i>
11/18/20, 12/9/20	Public engagement meetings <i>Members of the general public were invited to provide feedback in virtual community meetings</i>
12/7/20	Public Health Advisory Council <i>Members provide a sounding board and a community voice in the review and revision of public health programs, strategies and goals.</i>
12/8/20	Aging and People with Disabilities <i>Supervisors for DHS Clackamas County Aging and People with Disabilities</i>
12/3/20, 12/14/20	Law Enforcement <i>CCSO, DA, Community Corrections, LEAD</i>
12/16/20	Clackamas County Community Health Council <i>The governing board of Clackamas Health Centers. In partnership with the Board of County Commissioners, it is responsible for the oversight of clinical operations, health centers policy, and the recruitment of Health Centers leadership staff.</i>
1/12/21	Clackamas County Business Alliance <i>Business and community members that are committed to the economic strength of Clackamas County</i>

Summary of themes from engagement

In the engagement activities, participants gave responses to a series of three questions, which were paraphrased as prompts during the facilitated listening sessions:

1. What are the gaps/barriers for people experiencing or at risk of experiencing homelessness in our communities?
2. Are there gaps/barriers specific to communities of color?
3. If you could improve one thing about the housing/homeless services system what would it be? What should Clackamas County prioritize with this funding?

Comments from the listening sessions were distilled and synthesized to highlight the most common themes.

Similar questions were placed in an online survey that received 116 responses. The open-ended responses included multiple responses to each question, and some were not answered at all. The results of the survey were distilled and synthesized to highlight the most common themes, which aligned with the common themes of the engagement events.

The results of both the survey and the events were combined with the following overall findings. Detailed aggregation of data collected from the engagement events and survey follows this summary.

Summary of findings from Engagements and Survey combined:

Gaps in Homeless Services:

A number of gaps and barriers people experiencing, or at risk of experiencing, homelessness face in our communities were identified. The top gaps include:

- **Lack of effective behavioral health services (Mental Health and Substance Use Disorder responses)**

Because of various levels of program criteria, people often cannot access support until they have reached a dire state, and cannot keep the level of support necessary after they are stabilized. This presents incredible challenges to a person's success, and keeps them in a cyclical pattern.

A theme that emerged within this, was the need to dramatically increase the housing first model and access to harm reduction methods in the county. There was much discussion about the county lacking syringe exchange programming and needing to meet people where they are to provide individualized case management.

- **Shelter/Transitional Housing**

There are not enough shelter options to serve people experiencing homelessness in Clackamas County. Currently, the county only has four small year-round shelters operated by contracted providers: one focused on families, one for veterans experiencing homelessness, and two for domestic violence survivors. The county has no year-round shelter for people experiencing homelessness who do not fall into one of these categories; and most do not. Shelters are not only needed for the general population, but there is also a need for youth-specific shelters that include study areas and on-site resources.

- **Not enough rental assistance funding**
There is currently a gap in rental assistance funding, and the waitlist for assistance is too long. We need to invest in general, long-term, and short-term rent assistance to keep people in the homes that they already live in. Preventing folks from losing their housing is a necessity.
- **There is not enough investment in outreach**
There is not enough staff or capacity to do direct outreach to people experiencing homelessness. There is concern that this work mainly falls to law enforcement, when data shows that it is more effective for trained caseworkers or peers to lead this work.
- **Eligibility/qualification requirements for services and assistance**
A giant barrier is the number of requirements, sometimes competing, for various services. A range of barriers were identified in this category, including:
 - Income requirements
 - Definition of disability
 - Not meeting chronic homeless criteria
 - Proof of citizenship
- **Lack of supportive housing, systems navigation, and programs to develop necessary life skills**
There are very limited options for supportive housing in Clackamas County, and navigating the systems is not easy. Without a centralized location for people to go get housing, services, and access programs to develop life skills (job training, money management education, etc.), people get lost or frustrated.

Barriers for Communities of Color:

The top themes that emerged when discussing the gaps/barriers specific to communities of color include:

- **Culturally specific and appropriate services and information**
Clackamas County is currently lacking culturally-specific services and providers. There is a need to provide incentives and build relationships to bring these services to the county. Non-English speaking residents face barriers to accessing services that are not staffed by multilingual workers, and there is also a need for culturally-specific outreach to immigrant communities who have been impacted by the recent public charge ruling.
- **Mistrust of government**
Communities of color who participated in engagement sessions expressed concerns about whether it was safe to access services. The biggest theme in this category was around the public charge and the fear that immigrants have about what the impacts of receiving services could be for them. There was also much discussion of past trauma, and people of color not feeling welcome or safe in Clackamas County.
- **Disproportionate Issues with rental screening barriers**
There are barriers in rental criteria that include information like social security numbers, background checks, past evictions, credit history, and income level. Blanket policies that categorically deny any applicant based on these criteria disproportionately impact people of color.

- **Barriers in Accessing Services**

There were multiple items identified as barriers that people of color face when accessing services. These include:

- Implicit and Explicit Bias in Coordinated Housing Access system intake, prioritization and service delivery
- Lack of coordination on entry into system (need for No Wrong Door)
- Not enough options on ways to access system, include mobile access, multi-language intake

- **Other Equity Issues**

- Housing discrimination/fair housing issues
- Equity and trauma informed care, services and housing
- Institutional Racism barriers

Priority Investments:

Based on the engagement activities, the areas Clackamas County will prioritize with the new Supportive Housing Services program should include:

- **Investing in shelters and transitional housing with services**

There was overwhelming support for investment in transitional housing, emergency shelters, and alternative safety off the streets shelters, all with comprehensive low-barrier services. This is a huge gap that was identified, as there are no year-round shelters in the county that serve the general population.

Reimagining what shelter spaces look like through a trauma-informed lens can provide private areas for families, outdoor natural areas, and places for people to store belongings if they need to leave during daytime hours.

- **Establishing low/no-barrier mental health and addiction supportive services**

There is a need to establish non-term and permanent mental health and addiction services, so folks can remain stabilized after they are housed. Including people with lived experience in the design of these services will ensure that they are effective and people who access them will be successful.

- **Improving service navigation and integration**

Services need to be more accessible - whether on site of housing, or part of a mobile navigation center that can go directly to people living outside. Coordinated entry needs to be better integrated, with a No Wrong Door philosophy. This requires investing in staffing to increase capacity, hiring diverse staff, and partnering with culturally-specific service providers. There also needs to be an analysis of the system to make it more accessible, and allow people to feel safe accessing it.

- **Creating supportive housing opportunities & affordable housing units**

There are not currently enough units to place the number of people who need affordable housing. In addition, there are not enough opportunities for people who need services to be successful once they are housed. We need to develop more housing with supportive services, so there are places for people to transition to after being in shelters.

Homeless Service Gaps Themes from Engagements Q1

(In these engagements, participants gave responses to a series of three questions: what are the biggest gaps in homeless services in Clackamas County; what are the main gaps or barriers for communities of color; and what would you argue should be priority investments. This document groups themes in responses to the first question. Some responses appear more than once as they contained multiple elements relevant to more than one thematic area. Annotations in square brackets were added by H3S staff.)

Behavioral Health Services (Mental Health and Substance Use Disorder responses) (64)

- Mental health support, must hit rock bottom before people are eligible for support, this is a barrier
- Folks with acute mental health issues need support
- mental health support
- housing first model – assertive, available, comprehensive mental health support
- Mental health/substance together
- Some are cognitively incapable of getting services or knowing they want/need them
- More mental health as part of Supportive Housing
- Mental health/substance abuse fall under disability
- People with Mental Health/Substance Use Disorder find process of applying overwhelming and don't have adequate supports to apply
- Stabilization of mental health/drug or alcohol challenges
- Moving between levels of care – they are stabilized so they get moved down in care but then don't have the supports to keep them stable
- Mental Health/youth programs - Not qualifying as perfectly homeless
- Approach – holistic approach that addresses the layers of issues with an individual, substance, mental illness that are underlying issues to their homelessness
- Transitional housing when addiction is managed, mental illness often emerges and addiction counselors don't know how to handle the mental illness
- Intensive out patient
- Dual Diagnosis – (addiction/mental health)
- Expand LEAD [Law Enforcement Assisted Diversion] program – follow people with mental health/addictions with case management
- Therapy
- Including physical health care is managed as people transition into housing, plus behavioral health support for stabilization
- Resources to address trauma, stress, anxiety, that meets people where they are.
- Intensive clinical behavioral health outreach.
- Need more resources of this type, more transitional housing and mental health stabilization housing, long term stable transitional housing for people coming out of prison, the majority of whom are released from prison to homelessness if not for housing provided via Corrections.
- Critical need for severely mentally ill people experiencing homelessness, often who need some hospitalization beforehand but for whom there is not an existing system to bridge them into housing.
- Mental health stabilization housing programming administered by Corrections can serve as a model for people experiencing homelessness who are not justice involved

- If high barrier - mental illness and addiction, work with them over longer periods to engage in services and housing. Stressed that this is a critical need and that it not be law enforcement led.
- It's desperation, isolation, helplessness, hopelessness, panic and lack of sleep. It causes psychosis. And over time it becomes permanent.
- Medicaid is best for mental health and Medicare is the worst
- Preventative care for mental health is overlooked and just waiting for crisis before responding - Mental health/housing crossover
- Due to mental health issue lack of self-awareness – what they are doing is fine to them but is not - when do you force people to get care? Civil commitment
- Better links to Mental Health and Substance Use Disorder treatment
- Not knowing that substance abuse/mental health are disability [spec. to youth]
- Common cause of homelessness – addiction
- ER has no place to transport people – acute need for housing and interventions like addiction supportive services
- Underlying addiction – root cause
- Misdiagnosing the origin of homelessness – often addiction takes over and lives have sunken into homelessness and not functioning enough to keep housing.
- Central City Concern type model – treatment, healthcare, and getting people back to functioning
- Lose housing due to substance abuse
- Low income housing secured – relapse - lose housing
- Eviction prevention for those who relapse
- Low income housing units if person relapses so – prevention and stabilization when need to recover
- “right to remedy” – allow to detox and have a space to recover and in group settings make sure it doesn't disrupt congregate settings.
- Gap in recovery beds
- Substance use residential treatment assistance
- Low barrier for those struggling with addiction – no clean urinalysis needed
- Bridges to Change out-patient program model
- Hard to get clean when homeless even if motivated
- Stabilization housing for relapse
- Relapse – have a process not just eviction
- Safe use areas and harm reduction
- Restart program for behaviors that are just part of recovery process
- Wet shelters
- Stabilization
- Relapse – evicted – stop cycle
- Harm reduction
- hygiene - hard to stay safe and clean, lack of needle exchange services
- Harm reduction
- Not nearly enough needle exchange in county
- Housing first is a huge need with regard to people who use drugs
- harm reduction
- Drug addiction
- Housing First – how does it work with substance abuse – keep those struggling housed while balancing the safety of others especially those susceptible to relapse
- LEAD – best path to reduce crime and victimization – expand to cities and state

- Direct connections between housing and LEAD are needed
- biggest barrier to definitive treatment is lack of temporary and permanent housing

Shelter/Transitional Housing (31)

- Supportive housing & Shelters/transitional housing
- Shelter
- Shelter/transitional
- Transitional housing – longer term
- Transitional/Shelter hybrids
- Churches on board to expand
- Transitional housing
- Transitional housing, placement services and short-term rent assistance
- Transitional housing and Long term rent assistance/ supportive housing (3-5 yrs.) long enough for a job training program and while in education
- Shelters, rises in rent costs and number of homeless long-term rent assistance
- Remove super open shelters, people need privacy especially when they have kids. DV [domestic violence] person to recognize relationships, unhealthy relationships
- Shelters accessible in rural locations, by bus and not extremely far and only in the city
- Homeless shelter should be in every town not just transportation. Colton will not have enough for shelter, so they are competing with other cities so they can stay in their own city. It needs to be divided.
- Youth Specific shelter:
 - Hub for all of the resources, clothes closet with the information there, pantry
 - Study hall of youth in school
 - GED courses, financial aid resources for youth who have left school
- Space to store their things, even when they leave shelter during the day. Also not requiring guests to be gone for certain time and be back certain times.
- No shelters
- Shelter
- Safety off the streets
- Shelters & transitional housing is very, very limited.
- Shelter Space – currently must send people to Portland
- Wet shelters
- Have to refer to emergency housing in PDX because Clackamas does not have shelters
- Shelter first
- Outdoor transitional spaces – natural areas
- safety off the streets
- Villages and community settings for safety off the streets
- Working with corrections about release to shelters
- When transitioning people from short-term programs or into housing programs, there are no options for people who are unsheltered – need emergency shelter-safety off the streets.
- Need more resources of this type, more transitional housing and mental health stabilization housing, long term stable transitional housing for people coming out of prison, the majority of whom are released from prison to homelessness if not for housing provided via Corrections
- Need for shelter mentioned several times [in engagement with Community Corrections]
- Transitional Housing

Rental Assistance (in general, long term, and short term) (26)

- Rent Assistance to help with stability
- Rent assistance
- Better wages, logical social safety net, childcare, increased access to rental subsidies
- Rent assistance
- % of income - rent assistance
- Parents of young children – rent burden category - example 3 families in an apartment with each family in one room – rent assistance wait list is too long Need safe and affordable housing with families of young children so they are not doubled up/tripled up.
- Rent burden
- Rent Assistance
- Income gap to maintain housing
- Long term rent assistance
- Long term rent assistance
- Long term Rent Assistance
- Long-term Rent Assistance
- Long term rent assistance
- Sustainable long term rent assistance
- Long-term/short-term rent assistance
- Cost effective – keep people in their homes they already have – long term rent assistance
- Long term-short term rent assistance
- Transitional housing and Long term rent assistance/ supportive housing (3-5 yrs.) long enough for a job training program and while in education
- Long-term rental assistance
- Short Term Rent Assistance
- Short-term/long-term Rent Assistance
- Short-term/Long-term rent assistance
- Short term rent assistance
- Transitional housing, placement services and short-term rent assistance
- Short term to help more people

Outreach (22)

- Reach out
- Finding people who need housing
- Finding those in greatest need
- Difficulty in reaching “vulnerable” populations & difficulty working with them
- Outreach
- Access – how to find people who need housing – loop for assistance
- Identifying those in need – police monitor in Lake Oswege and community service officer oversees – partnerships with them for outreach – need strong Community point of contact
- Official street outreach
- Lived experience workers for outreach
- Outreach/Education/plan
- Diversion, outreach services
- Law enforcement approach is not working – CAHOOTS model – maybe a model that is more helpful than a law enforcement intervention – sandwich and a ride instead of

handcuffs. [CAHOOTS is a non-police 911 intervention for people experiencing homelessness in medical or mental health crisis based in Eugene, OR]

- Outreach services
- Outreach services
- additional outreach workers and increase their wages to meet the work they do
- Portland Street Medicine
- Intensive clinical behavioral health outreach.
- Outreach/communications, making it easier for people to access services using texts, etc., because of ways that tech poses a barrier to accessing services
- Outreach - low barriers and high barriers [i.e., outreach connected to appropriate levels of service/housing for people with low and high barriers to accessing services/housing]
- Effective outreach similar to LEAD
- Outreach – to folks who are in tents, etc.
- Law Enforcement – as first interaction doesn't appear to help – punitive – new approach needed to reframe what it means to show up.

Populations with specific or underserved needs (responses related to race and ethnicity are grouped under Q2) (17)

- Women without kids
- Who will be “vulnerable?” - Prioritizing communities in need
- Services related to women with no children with multiple barriers
- Serving people under age 18
- There is only 1 homeless liaison per school district: having more liaisons, resources for youth who are not in school, peer services for housing, more peer services in schools
- Head Start families need support
- Students - a huge amount of students facing housing insecurity and houselessness
- Few host families or families taking in houseless youth, need more housing for youth and especially LGBTQ youth who safe places outside the family
- LGBTQ and Trans specific housing programming
- Housing programs for people who have arson convictions (these are hardest to house of all justice involved people) & level 3 sex offenders. Corrections houses these folks in highly expensive interventions like motels because they are often unable to match them with housing that will take them
- Elderly parents – families unable to care for them
- People who can't speak up for themselves due to their disability
- Engage with those who are homeless or near homeless due to disability mostly through family members
- Parents of adult children with disabilities - struggling when parents age out
- Need to assist those on Medicare and uninsured and underinsured
- People with developmental disabilities – housing options are not what they want
- Medicare clientele

Eligibility/qualification requirements for services and assistance (16)

- Once qualify for one thing it disqualifies for other things
- Living with a friend they don't qualify [e.g., as experiencing homelessness]
- Income goes up and things are taken away – does not encourage them to work on independence
- Income requirements to qualify
- Definition of disability to qualify

- Determining who is “most vulnerable”
- Programs working together – qualifying for one disqualifies you from another.
- Screening – if they are living with someone they still need to qualify for HCV
- Medicaid have to have income under \$771 (or whatever it is now) and if they go a penny over they lose assistance – not encouraged to improve and gain independence
- Mental Health/youth programs - Not qualifying as perfectly homeless
- Not meeting chronic homeless criteria
- Don’t qualify for other DV services when reuniting
- Low income /not low enough for OHP [Oregon Health Plan] - not normally eligible for services
- HUD [Housing and Urban Development] – requires documentation – citizenship, Proof of ownership, may not have one or both
- Strings attached
- Elderly – homeless with no services – don’t check the boxes

Supportive Housing (15)

- Supportive Housing is lacking - do have a fair amount of recovery housing – funds to supportive housing
- Supportive housing
- Supportive housing & Shelters/transitional housing
- Supportive housing
- Supportive housing
- Supportive Housing
- Trauma Informed Services & Housing – Quality & Population Specific not just quantity
- Permanent supportive housing
- Permanent supportive housing
- Transitional housing and Long term rent assistance/ supportive housing (3-5 yrs.) long enough for a job training program and while in education
- Just not enough housing – Permanent Supportive Housing or affordable housing
- Ensure when a person is in Supportive Housing that they are able to maintain services and have a move on strategy
- Including physical health care is managed as people transition into housing, plus behavioral health support for stabilization
- Permanent Supportive Housing as long term - may do well while having intensive case management/peer support but need long-term support.
- Lack of trauma informed housing sites - Need 24 hour onsite staff available that is trauma informed to get them stabilized when housed

Housing Navigators / System Navigation Supports (15)

- Need a field bridge to services – all counties need connections to services
- Community point of contact
- How to navigate the system
- Housing navigation and services navigation
- System Navigation/CHA [Coordinated Housing Access] navigation or assistance
- Specifically Housing Navigation – staff with experience in many different areas
- Have a system that follows people and stays with them like LEAD [Law Enforcement Assisted Diversion]
- System Navigation – guidance through process
- Barriers in systems - application for housing navigators

- Navigation – walking through until housed like in WA County
- Need central clearing house to find contacts for services
- Easier connections to housing and services for deputies in the field
- Integrated system like LEAD where everyone knows what is going on - joint text system to help keep appointments and LEAD and cops working together to find and help people
- Peer Support & Navigation
- Money management with housing navigators

Employment assistance, financial skills training and services (15)

- Employment issues
- Life skills
- Budgeting
- Money Management education
- Skills to help stabilize housing - Money Management, Housekeeping skills & Organization Skills
- Money management is provided by SS and is provided by case management (paying bills) if not Social Security
- Offering Microloans maybe
- There is a difference between Money Management and simply not having enough \$\$ to pay bills.
- Transitional housing and Long term rent assistance/ supportive housing (3-5 yrs.) long enough for a job training program and while in education
- Employment pathways – like the community college
- opportunities for job training
- Financial recovery
- Helping those we were independent get back to that independence
- Money management with housing navigators
- Many moving parts to help people achieve independence

Lack of Housing / Affordability (13)

- Just not enough housing – Permanent Supportive Housing or affordable housing
- \$1500 a month is not affordable
- A person who works 2 FT jobs and still can't find housing.
- Pricing issues
- Poverty of \$500-600 a month
- Lack of affordable housing units/structures
- Subsidize or build
- Market is driving housing costs above affordability
- No place for someone starting out in their career that is affordable
- Family wage – living wage for 1 adult/2children is \$35/hour but most don't come close.
- SSI - \$783/month income limits max. – 100% poverty, plus have disability and age
- Housing availability
- Housing availability

Transportation / Geographical Accessibility (12)

- Transportation - for most everything.
- Rural Component – stay in their area – Canby/Estacada/Sandy/further out
- Transportation
- Bus tickets/transportation

- Shelters accessible in rural locations, by bus and not extremely far and only in the city
- Homeless shelter should be in every town not just transportation. Colton will not have enough for shelter, so they are competing with other cities so they can stay in their own city. It needs to be divided.
- Lack of reliable transportation – housing more expensive where there is good transportation.
- Where services are/where people are – transportation
- Transportation access
- Transportation/spec bus passes. Oregon City, Gladstone, s Milwaukie, not having access to transit because they can't buy bus passes where they are, so people are missing ability to access services, employment, health care.
- Geography – we focus on the central part of the county but they live in rural areas as well, have the same needs as people in urban areas but none of the resources, need a unique approach.
- Access to health services in close proximity to where folks are

Arrears, criminal history, and other housing barriers (12)

- Application process
- Overcoming past property debt
- Rental criteria – background check, credit check, past eviction
- Eliminate past housing/utility debt
- Pay past debt that hinders ability to rent now.
- Crime/Conviction
- Criminal convictions disqualifying
- Difficulty in paying App fees/first month/last month deposit – difficult for families helping their loved ones who are needing help.
- Bad credit/criminal history – need advocate to help and support them through the process
- Fund expungement clinics etc to address criminal history barrier.
- Criminal history – landlords - help of advocates like in LEAD
- Expungement for youth experiencing homelessness, peer-to-peer support, mentorship to do life and keep moving upward

Homeless Prevention (10)

- homelessness prevention – must hit rock bottom before people are eligible for support, this is a barrier.
- A big issue with my clients is domestic violence. The rules with low income housing units are usually pretty strict (which is good) but I have had clients get kicked out because they wouldn't stop seeing their partner who (because of violence) wasn't allowed on the property. I have no idea what the solution is to that, but it is a problem
- Eviction prevention
- Eviction prevention for those who relapse
- Eviction
- Evictions - difficult to get housing back
- On-site services to provide interventions/treatments before evictions occur
- Need to get services for underlying root causes
- Reaching those who need eviction prevention – keep people housed
- Lack of homelessness prevention – think upstream

Housing First Model (10)

- housing first model – assertive, available, comprehensive mental health support
- Housing First model that leads to supportive housing
- Immediate low barrier housing options
- Housing First Model – not requiring sobriety, good rental history, not excluding folks with prior felonies - (low barrier)
- Housing first is a huge need wrt people who use drugs
- Housing First – how does it work with substance abuse – keep those struggling housed while balancing the safety of others especially those susceptible to relapse
- Immediate access to housing on demand
- Low barriers to housing and services
- Housing First Model
- No immediate supportive housing or help.

Peer Support Services (10)

- peer support
- Peer Support & Navigation
- Expungement for youth experiencing homelessness, peer-to-peer support, mentorship to do life and keep moving upward.
- Peer delivered services
- Peer run house [refers to program described by Ally Linfoot for folks with dual diagnosis]
- evidence-based solution is increasing access to peer-based supports
- Lived experience workers for outreach
- Permanent Supportive Housing as long term - may do well while having intensive case management/peer support but need long-term support
- 1 homeless liaison/ district, having more liaisons, resources for your who are not in school, peer services for housing, more peer services in schools
- Youth Action Board – hearing young people’s voices

System Integration, Coordination with Sectors/Partners (10)

- Coordinate Full region not just county for case managers
- Working regionally –
 - Easier to work with Multnomah county – all parts located in Joint office – Clackamas is spread out into different departments
 - As Case workers – Clackamas is easier with less providers for example 1 energy assistance program – also more solid agencies
 - Don’t know each other’s systems
 - CHA better but 211 is 24 hours
- Working with corrections about release to shelters
- Lack of integration of services
- Integrated system like LEAD (Law Enforcement Assisted Diversion) where everyone knows what is going on - joint text system to help keep appointments and LEAD and law enforcement working together to find and help people
- Silos in work – no follow up
- Strengthen Public Health's relationship to this initiative in order to support individuals/families.
- More money toward public health
- Collaboration with services are not quantified.

- Government funding - transferred to others (church based organizations, etc.) to build housing

Coordinated Housing Access (CHA) and Waitlist issues (9)

- Process time – 5-6 weeks just to hear a No
- Lose trust in staff
- Transparency of process – updates on wait
- Reputation building – people currently feeling we [County] won't help
- Coordinated Access - Can't stay in touch while on waiting list
- HMIS [Homeless Management Information System] – CHA Assessment – so much data entry – make it easier
- Proper needs assessment to see real barriers at the beginning
- Long waitlists
- Wait lists - wait to get on list and wait for years to get housing

Community-Supportive Models/Intervention types (8)

- Houselessness is its own community
- Villages and community settings for safety off the streets
- Address challenges to transition for people who depend on community
- Community building to foster independence – community focus on assets that each person brings to the community, truly heal from circumstances and live their best life.
- Keeping everyone together – difficult for rapid rehousing
- Healthy social connections
- Moving additional people into their housing – jeopardizes their housing
- Creative solutions - Olmstead,¹ or others - Like cottage settings with supportive services.

Information, Referral, and Access (8)

- Access – how to find people who need housing – loop for assistance
- Phone access
- The lack of knowledge of the programs that are out there when they do not have community connections like school. (Use flyers, training posting on social media, sitting at the transit stops)
- Couch surfers for people who think they are not homeless enough and not sure of the services that are out there
- Outreach/communications, making it easier for people to access services using texts, etc., because of ways that tech poses a barrier to accessing services
- Easy list of immediate services available – here is where you can get a shower, a meal, etc. to point them in the right direction
- Need central clearing house to find contacts for services
- Easier connections to housing and services for deputies in the field

¹ Refers to *Olmstead v. L.C.*, in which the US Supreme Court ruled that segregation of people with disabilities in institutional settings for housing or employment were violations of the Americans with Disabilities Act, and “held that public entities must provide community-based services to persons with disabilities when (1) such services are appropriate; (2) the affected persons do not oppose community-based treatment; and (3) community-based services can be reasonably accommodated, taking into account the resources available to the public entity and the needs of others who are receiving disability services from the entity.”

(https://www.ada.gov/olmstead/olmstead_about.htm).

Housing repair/rehab (8)

- Trailer Court families – Repairs to live there are difficult to afford and may cause unsafe environment such as no heat because they can't fix the furnace – need funds to help them with repairs
- Flexible money for low income for repairs – might have a roof over their heads but structure isn't sound.
- Mobile Homes – habitability – repair funds
- Mobile home parks – trailers not owned by occupant but owned by the park. Don't qualify for any help. They pay rent and they have to pay for all repairs. Rent can be 800-1000 a month – homes are falling apart but they don't qualify for help.
- Stick built homes – home is paid for but they don't have the means to maintain the home – don't qualify for loans
- Combine with rehab – qualifications for programs are so hard to meet for anyone to use them – example the roof program.
- Without proper repairs and maintenance many homes will become condemned - evicted pushing them to homelessness
- Repair damages to properties to support landlords and keep them happy

Hygiene Access (8)

- Hygiene, toilet, hand washing, showers
- hygiene - hard to stay safe and clean, lack of needle exchange services
- Students - in poverty and lack access to menstruation supplies.
- Sharp boxes = where to put them/property owner IGA/Follow-up
- Garbage access is a part of the hygiene gap
- Housing –needs are addressed in terms of hygiene
- Hygiene needs – hand washing, showers, laundry. Small issues compound into large issues b/c of lack of hygiene
- hygiene needs

Flexibility and Responsiveness to Change/Needs (8)

- Whatever we set up focus on the “need” not fit it into each program.
- Shift people between programs – be flexible to meet needs and as new needs arise
- Housing that is not time limited
- Build in flexibility to reevaluate and adapt as conditions change and information changes
- Be intentional
- Low barriers to housing and services
- No immediate supportive housing or help
- One and done mentality – lose access if they lose the housing they get – keep trying over and over – takes multiple attempts to really reach population A who have the most challenges

Community Engagement / Education (6)

- Community buy-in – how do we get people to see the gift this funding is?
- NIMBY [“not in my backyard”] involved? - A gap and barrier for all kinds of services
- County doesn't have a clear picture of the problem
- Destigmatize - Have staff who can address NIMBY, work with neighborhood associations, city councils, staffing the need to do community engagement to destigmatize these issues and help shape public opinion/support vs opposition
- Outreach/Education/plan

- Community perception/buy-in

Domestic Violence and Family Reunification (6)

- A big issue with my clients is domestic violence. The rules with low income housing units are usually pretty strict (which is good) but I have had clients get kicked out because they wouldn't stop seeing their partner who (because of violence) wasn't allowed on the property. I have no idea what the solution is to that, but it is a problem.
- Domestic violence
- Family reunification but no contact orders – need for 2 apartments
- No contact orders
- People living in cars due to no-contact orders
- No intervention until there is a crime – crime could have been avoided with better interventions

Housing Placement Services (5)

- Housing Placement
- Help them prepare for housing
- Housing search help
- Placement services
- Transitional housing, placement services and short-term rent assistance

Housing choice / continuum of housing options (5)

- Options on continuum of housing choices
- For people with developmental disabilities – available housing options are not what they want
- People with developmental disabilities – on top of addiction/Mental Health – rent assistance and roommate situation – something subsidized that they can afford [speaking here to lack of housing choice for people with higher levels of need for intensive services]
- Just want housing - even recreational marijuana that is legal in OR is not allowed.
- True continuum of types of housing – tiny to large complexes

Gaps/Barriers for Community Based Organizations funded by the County (4)

- Increased funding to programs that already exist
- Work with community groups as a funder - county is currently a funder and provider – conflict of interest when deciding between county program funding and community provider funding
- Contracts should be low barrier for providers/contractors
- Supportive Documentation – reference documents instead of resubmitting for reporting.

Pay Equity and Workforce Development (4)

- Combined efforts – Antfarm – subsidized employment opportunities
- Apprenticeship – to build positions within programs. Good workforce graduating out of programs
- Community based organizations/partners – unfunded or inappropriately funded – staffing is the largest cost – need to be paid well
- additional outreach workers and increase their wages to meet the work they do

Trauma-informed responses (4)

- Trauma informed long term case management
- Trauma Informed Services & Housing – Quality & Population Specific not just quantity
- Equity and trauma informed care
- Lack of trauma informed housing sites - Need 24 hour onsite staff available that is trauma informed to get them stabilized when housed

Childcare (3)

- Childcare that goes beyond the normal basic day time shifts – quality and safe childcare to allow people to work.
- Decent affordable child care/easy access/safe places for kids to be
- Better wages, logical social safety net, childcare, increased access to rental subsidies

Homeless System Diversion (2)

- Diversion Systems
- Diversion, outreach services

Other Services/Interventions (18)

- Rent Control – other ways to give assistances that can help prevent loss of home
- Law enforcement approach is not working – CAHOOTS model – maybe a model that is more helpful than a law enforcement intervention
- Case management
- Intensive Case Management
- Intensive out patient
- Home health services
- High speed internet - lack of providers in the whole county
- help with Landlord/tenant relationships
- legal assistance
- gardening
- Charging stations
- Portland Street Medicine [an outreach model to connect people experiencing homelessness to health care]
- More preventative care
- Vision and hearing assistance
- Intensive case management
- Housing specialists to field landlord calls and problem solve 24/7 – immediate response
- Accessibility – ADA units & Supports on site
- Direct connections between housing and LEAD are needed

Other Gaps/Barriers, general observations (22)

- Zoning Laws
- Underlying causes/in-depth reasons for homelessness
- Layers of needs - address complexity of underlying needs
- help individual AND address system problems/challenges
- address systemic issues
- extremely difficult to get resources in the field
- Many don't want/are not ready for help
- Waiting until issues are critical before getting help
- People get lost in the cracks

- Safety nets need safety nets
- Data inadequate to make good policy and investment decisions - especially about population at risk of homelessness - We don't have the data on characteristics and needs of populations.
- People who are okay with their circumstances but yet what they are doing is making things unsafe for others.
- Dignity and quality of life
- Law Enforcement
- Low barrier
- Catalyst – not enough to give to everyone
- High rise model
- Not staying placed when placed
- Family dynamics
- Not willing to engage with deputies
- Built for Zero

Barriers for Communities of Color Engagement Themes Q2

(In these engagements, participants gave responses to a series of three questions: what are the biggest gaps in homeless services in Clackamas County; what are the main gaps or barriers for communities of color; and what would you argue should be priority investments. This document groups themes in responses to the second question, while also incorporating responses to the first and third questions that touched on race/equity. These responses are drawn from the notes from thirteen engagement events.)

Culturally specific and appropriate services and information (40)

- Lack of culturally specific services in Clackamas County.
- Culturally appropriate services are not there
- Culturally appropriate services
- Culturally appropriate service providers – like in Multnomah County
- Easy access to all info in Spanish
- We don't serve BIPOC [Black, Indigenous and People of Color] well – lack of services
- Trauma Informed Services & Housing – Quality & Population Specific not just quantity
- Language – Initial access and ongoing internal contacts to explain information
- Building confidence with using community trusted leaders to spread information.
- No resources, some for Latinx, none for Black or Asian that is a huge gap
- Bilingual services – unable to get help with language barriers
- Lack of culturally specific services
- Need case managers they can trust
- Outreach needed for Black and Latino groups like chamber of commerce –American Chamber of communities of color (?) and the Hispanic Chamber of Commerce.
- Understand the communities more to be able to do targeted outreach
- Lack of culturally specific Providers – include this in the plan to address this
- Bilingual culturally competent - yes native language speakers not just trained
- Equity issues in contracting – larger groups with grant writers and experience given preference to smaller groups without skilled writing staff.
- Lack of providers
- Incentives to bring in culturally specific providers into Clackamas County
- Bring in providers like they did with COVID – public health
- Latino network and IRCO [Immigrant and Refugee Community Organization]
- Using personal contacts to pass information – someone they trust
- Language access
- Outreach targeted to non-English speaking
- Navigational assistance to help those who need culturally specific services
- Recovery looks different depending on your lived experience
- Culturally specific environments
- Understanding cultural differences
- Yes I believe there needs to be more cultural specific outreach. Particularly, for immigrant communities who have been impacted by the recent public charge ruling. I would love to see Latino Network and IRCO at the table.
- LGBTQ and Trans specific housing programming
- lacking culturally specific services
- Lack of outreach in Clackamas County – specifically for African community

- Bilingual
- Bicultural
- Include Indigenous people
- Language and culture appreciation
- Layers of culture
- Differences among broad groups
- Individuality – Don't make assumptions on race/ethnicity because a box is checked.

Mistrust of government systems, unsafe/unwelcoming community (45)

- Many DACA [Deferred Action for Childhood Arrivals] and undocumented families cannot access services because of Public Charge...
- Distrust of the system/government
- Public charge – removing from all services – misinformation
- Getting them to accept services
- Mistrust/unsafe
- Lack of trust in government
- address a household's feeling of physical safety in certain types of housing
- Resources shouldn't be connected to public charge
- fearful of connecting
- Safety in asking for these resources also
- Families need to live where they feel safe as People of Color.
- Safety also means asking for resources – fear of govt.
- Government officials – barriers of fear
- Safety
- Safety for asking for services
- Public Charge
- Fearful of everything.
- Lack of trust in system – don't seek/refuse help
- Public charge
- Governmental system - reroute through non-governmental entities
- having a Social Security number, Public charge, criminal backgrounds
- Safety – lack of trust in systems
- Is Clackamas County a friendly place for diverse people?
- Immigrants are afraid of government
- Restorative justice - systems trauma – difficult for them to engage in services
- Trauma in accessing systems
- ICE – Public Charge – Fear
- Distrust of government for any communities
- Not just accessing services but a place they feel safe and part of a community
- I think many immigrants that may be here illegally are too worried to reach out to get services even if they need them due to fear of deportation.
- Not feeling Welcome in our country
- Safety
- Presumptions – mistrust
- Undocumented – trust issues
- Fed & State & ICE fear
- Liaisons & coalitions instead of direct service to help further build trust
- History

- History of Racial injustice – not that long ago - In Salem, it was illegal to sell houses to people who are African Americans or people from other countries.
- Racial trauma – friend leaving Happy Valley feeling unsafe
- Speak about missteps and mistakes - we are not color blind and need to acknowledge
- Undocumented population
- Justice System is already set as an adversarial system from the start.
- Building trust
- Public charge
- Psychological cues and Physical space – subtle things in environment of racism

Disproportionate Issues with rental screening barriers (13)

- Rental criteria
- again the rental criteria
- People of color are more likely to have a record because other systems are broken
- Criminal background check
- Lost birth certificates/ID
- Social Security number/documents
- Pre-requisites for housing
- having a Social Security number, Public charge, criminal backgrounds
- Rent assistance program barriers
- Probation – hard to be housed in another county
- ID requirements
- Rentwell – more of this type – poor/lack of rental history
- Screening criteria – including credit history and limited income

Barriers in Accessing Services (19)

- Coordinated Access – [the next four bullets relate to this one]
- List is in order of who called first [in Coordinated Housing Access, or CHA]
- Bias in intake form [CHA]
- How do we prioritize BIPOC with equity? [in CHA]
- Implicit and Explicit bias [in CHA]
- Housing insecure Latinx that are not getting served because the resources are going to those who are already being served.
- Access to services
- Engage by cell – texting platform to reach out.
- Mobile website
- One system for all entry – DHS –
- No wrong door
- Awareness of resources
- Phone access
- Having families not have to duplicate effort and information is always a good thing
- transparency around how the CHA system works, what folks can expect when they call, what funds are available, and what funds will be
- Access to services - huge discrepancy between white and Hispanic households, and Latinx folks do not know about what assistance is available to them.
- Discrimination based on the look of a person
- Barriers to remain stabilized

- Addiction – terrible outcomes for Black men and women – kicked out for behaviors that white counterparts would have been given benefit of doubt

Housing discrimination/fair housing issues (10)

- Yes, expanded fair housing expertise and intervention!
- Fair Housing advocacy
- Landlord/Tenant education & conflict resolution services
- Landlord racism
- Rental screening bias
- If people experience discrimination have resources to know their rights and a community to leverage so they are not alone
- Landlords – educate them on diversity
- Judgment of motivations based on race
- Housing bias – landlords not giving benefit of doubt
- Eviction prevention – eviction showing BIPOC heavy

Diverse representation in employment by service providers/housing providers (9)

- Representation of the people supporting you, most of the service providers are white, youth are not seeing representation in services
- Representation Also for LGBTQ, younger youth, youth of color and staff with lived experience.
- Not enough people of color in the workforce of organizations/providers/case managers
- Diversified staff to meet them culturally
- I would like to see strong efforts be put in for hiring individuals who reflect minority populations.
- Hiring people who represent BIPOC
- How we are hiring – who is serving
- Staff – not trusting people that don't look like them
- Create pathways to employment for specific communities

Disproportionate barriers related to childcare (7)

- distance learning gaps and work from home - virtual learning disproportionately impacts
- echoed the disparities in distance learning and parents not being able to participate equally
- Choice of economics/education of children at home
- Pandemic- distance learning
- Preschool promise – one parent not working, reduced income
- People of Color more likely to have jobs they have to "go to" and have a difficult time to help when children are distance learning
- Childcare

Race/Ethnicity Data Improvement Needs (7)

- More understanding of racial imbalance in Clackamas County so corrections can appropriately respond.
- Better awareness of what is being said out there – are we doing things we are unaware of? That is causing % BIPOC in homelessness data exceeding county % BIPOC
- Provide more racial equity information to the DA and sheriff's office
- Outcomes & impacts data for front lines – need to understand true situation

- Demographics of homeless communities of color? - White or Hispanic are most seen on street corners in Clackamas County
- Asian/Hispanic homeless data – may be inaccurate due to staying with families
- Not sure what is happening – what are we missing?

Barriers related to transportation/displacement (5)

- Bus tickets (transportation)
- lack of transportation to access services
- Rent burden & Affordability – pushed out to other areas
- Affordable housing not near services - Pushed to more rural areas for affordability but further from the services they need. – can't afford rent in the areas they need/want to live.
- Transportation

Housing type responses (5)

- we need more affordable housing units that fit larger sized families
- Multigenerational housing options
- Low barrier housing first approaches
- Few host families or families taking in houseless youth, need more housing for youth and especially LGBTQ youth who safe places outside the family.
- LGBTQ and Trans specific housing programming

Other Equity Issues (15)

- Finding people in community that look like them.
- LGBTQ+ - hidden and marginalized
- Equity and trauma informed care
- Trauma Informed Services & Housing – Quality & Population Specific not just quantity
- Include people of color in the planning process
- Do better training with the people we have to minimize cost, training is cheaper
- Institutional Racism barriers
- Low barrier sexual/reproductive health – funding only if can bill medicaid excludes the Latino community – SHEAA [Sexual Health Education Accountability Act, a California law] funding only for government type institutions and excludes culturally specific providers.
- Not identifying themselves as part of a community of color although others view them that way
- Review from a distance with a lens of equality
- Not wanting to identify as a community of color
- Not making assumptions about what you think is best
- Implicit bias – unconscious bias – raise awareness
- Recheck ourselves for blind spots
- DA – must be fair with similar outcomes from similar situations - not seeing specifics in their cases of the disparities being talked about.

Other Specific Resources Needed (9)

- Navigators to partner with housing
- Legal assistance
- support / money for undocumented folks
- Employment Services

- Health Insurance
- Avenues to Higher education for longer term stability
- Outreach
- Long haul to change (not easy or fast)
- Empower those in our system to inform our system to improve it. Personalize it.

Priority Investment Engagement Themes Q3

(In these engagements, participants gave responses to a series of three questions: what are the biggest gaps in homeless services in Clackamas County; what are the main gaps or barriers for communities of color; and what would you argue should be priority investments. This document groups themes in responses to the third question. Some responses appear more than once as they contained multiple elements relevant to more than one thematic area. Annotations in square brackets are by H3S staff.)

Shelter/Transitional Housing (41)

- More shelter/transitional options while we find long term supports/housing
- agreed, I'd like to see shelters , transitioning to supportive housing with comprehensive services available as needed
- shelter for folks who need some medical/care support either short or long-term
- safety off the streets for people with acute or special needs (ex, family with children with autism)
- Shelters that are ADA [Americans with Disabilities Act] Accessible allowing for wheelchairs
- Year round shelter with housing-focus (shelter with on-site case management)
- Safety off the streets shelter (transitional shelters, basic services shelters, outdoor shelters)
- Transitional /shelter
- Shelter
- Basic shelter of unhoused
- Emergency Shelter and Transitional Housing as part of the continuum for folks who need immediate assistance
- I think the most urgent/time sensitive priority is definitely basic shelter for people who are unhoused, so shelters/transitional housing, but then I always want to know what the plan is for longevity
- children need to be able to access services at shelter or transitional housing
- Immediate Low barrier safe places to immediately house
- People not ready for Permanent Housing – transitional first for better success
- Housing First – low barrier transitional like shelter but more services
- Blurred lines – transitional housing and shelter
- Keep people in homes they already have or put them temp housing (e.g. shelter or transitional housing)
- Short- and long term housing needed
- Transitional housing, placement services, and short-term rent assistance – especially for no contact orders
- Shelters
- Bigger houses to service more people - Shelter & Group
- Youth Shelter Services looked more like hotel vouchers or an actual room (especially for people with children/families)
- Dorms style Youth shelter
- Transitional housing
- Shelters
- Youth Specific Shelter (mentioned multiple times and discussed in scope)
- Emergency Housing – need it immediately – currently only have some for DV [domestic violence] and youth

- Emergency Shelter then supportive housing
- Immediate housing
- Low barrier emergency housing
- Low barrier emergency housing
- Low barrier emergency housing
- Emergency housing
- Low barrier emergency housing
- Emergency housing is so desperately needed in Clackamas
- emergency shelter
- Definitely low barrier emergency housing and follow through to transitional and permanent housing
- Shelter space
- Addiction shelter/transitional housing – recovery houses, oxford houses
- Availability of resources especially emergency housing

Alternative Shelter/Safety on the Street (8)

- Places for people to be
- Permanent stable and safe physical spaces – places for people to go
- Get people off the street or make them safer on the streets – meet basic needs – moving to a better place than they are today.
- a plan for people who don't want to be housed, but like camping
- Safety off the streets shelter (transitional shelters, basic services shelters, outdoor shelters)
- Wait-time – have safe places to wait for permanent housing
- Safety on the streets (survival gear, hygiene services, service navigation outreach)
- Access to shower and some clean clothes

Housing First/Immediate Options off the Street (similar to shelter responses) (7)

- Housing First – low barrier transitional like shelter but more services
- Immediate Low barrier safe places to immediately house
- Less waiting lists and more immediate housing
- Housing First
- Immediate housing
- Housing first, housing always
- Forget-Me-Not – housing first [referring to a supportive housing program in Juneau, Alaska]

Behavioral Health Services (mental health and substance use disorder treatments) (19)

- One thing: access to Mental Health support services
- drug treatment
- mental health and long term housing support
- Behavioral Health services (Mental Health support, addiction & recovery services)
- Permanent supportive housing services (intensive case management, behavioral health services, life skills, cleaning, support for Activities of Daily Living)
- Supportive housing for those who do not qualify for OHP [Oregon Health Plan] and eviction prevention, the latter including substance use disorder services
- Medically assisted treatment
- Incentives to apartments/landlords to retain housing for COVID affected families who have mental health/substance use/developmental disability issues

- Addiction shelter/transitional housing – recovery houses, oxford houses
- Bridge for mentally ill leaving hospitalization
- Model like MHS (mental health stabilization) program with Corrections – model for non-justice involved.
- More transitional housing and mental health stabilization housing
- Drug treatments and recovery
- Mental health services
- Health services (mental and physical- including substance use services)
- Substance abuse – recovery services
- Expand LEAD [Law Enforcement Assisted Diversion]
- Harm prevention – Chez Ami [a Central City Concern housing program in Clackamas County]
- Mental Health Crisis Connections

Service Navigation and Integration (19)

- Benefits navigation & acquisition (attaining social security benefits & others)
- Peer support services (outreach, service navigation, housing stabilization)
- Navigate resources
- Easier system to navigate
- timing is important and people need to be able to access services at the right time and commitments to the people being served across their needs - wrap services
- coordinated resources to ensure folks are able to access the services they need
- Helping people apply for SSI/SSDI [Supplemental Security Income/Social Security Disability Insurance] who can't apply on their own for whatever reason
- One of the biggest problems we have seen with some of our most vulnerable is that they will not or cannot apply for themselves even with help.
- Yeah, especially if there are extra barriers like they lost their ID and birth certificate in a raid and can't afford replacements [connected to previous response]
- helping people navigate resources in SSDI, also gradually lower assistance as person strengthens instead of just cut off after 3-6mos
- Increased outreach and navigation
- All programs within the county need to be connected on housing programs. Right now just refer to different programs they know nothing about – need warm handoff.
- Services to point people in the right direction
- All services under one roof instead of scattered throughout the area
- Safety on the streets (survival gear, hygiene services, service navigation outreach)
- Navigation centers
- Mobile Navigation Center - Go to people that are on the streets instead of removing them from where they are and taking them somewhere – they lose everything when that happens
- Integrate services
- Care coordination – physical, mental, housing, etc.

Supportive Housing (15)

- Supportive housing
- Wrap around services
- agreed, I'd like to see shelters, transitioning to supportive housing with comprehensive services available as needed

- Permanent supportive housing services (intensive case management, behavioral health services, life skills, cleaning, support for Activities of Daily Living)
- supportive housing
- Supportive housing for those who do not qualify for OHP and eviction prevention, the latter including substance use disorder services
- mental health and long term housing support
- timing is important and people need to be able to access services at the right time and commitments to the people being served across their needs - wrap services
- Permanent supportive housing
- Emergency Shelter then supportive housing
- Placements into community based affordable housing with services instead of specialized care
- Creation of Affordable housing but supports and services to get in and keep them housed
- Not just a house – need supportive services
- Forget-Me-Not – housing first [referring to supportive housing program in Juneau, Alaska]
- Onsite supportive services in housing

More Affordable Housing in General (12)

- More units
- All housing options
- Affordable housing – permanent
- Short- and long term housing needed
- 3 more Hillside [refers to Housing Authority-operated public housing Hillside Manor]
- More housing stock
- More housing
- More housing
- More housing
- Affordable/low-income housing
- Affordable/low-income housing
- Affordable/low-income housing

Homeless Prevention/Housing retention services (12)

- Homelessness prevention
- Supports to keep people housed
- Eviction Prevention
- Eviction prevention
- Keep people in homes they already have or put them temp housing (e.g. shelter or transitional housing)
- Get people off the streets first, then help with rent burdened people to keep them stable
- Supportive housing for those who do not qualify for OHP and eviction prevention, the latter including substance use disorder services
- Housing retention resources--eviction prevention and stabilization
- Housing retention services
- Housing retention services
- Safety net of keeping people from becoming homeless to be able to stay where they are
- Peer support services (outreach, service navigation, housing stabilization)

Outreach (11)

- Housing placement-oriented outreach
- Peer support services (outreach, service navigation, housing stabilization)
- Safety on the streets (survival gear, hygiene services, service navigation outreach)
- Increased outreach and navigation
- outreach services
- CAHOOTS model – behavioral health instead of law enforcement as a better response than we have now [refers to a non-police 911 intervention for people experiencing homelessness in medical or mental health crisis, based in Eugene, OR]
- Outreach services
- Simple Model - Reach out to someone who is experiencing homelessness and simply ask them what they need and fill those needs
- Expand LEAD
- Community based DV providers and outreach
- Mobile Navigation Center - Go to people that are on the streets instead of removing them from where they are and taking them somewhere – they lose everything when that happens

Children, Youth and Family inclusion responses (11)

- low income housing for young adults who have no family support
- Children allowed
- Larger units (large and multi-generational families)
- Units in a location so families are not displaced
- Connections w/child care and schools
- In a new building, ensuring that a child care space and program are part of it.
- children need to be able to access services at shelter or transitional housing
- Get Creative - Group “families” together – chosen families – community of choice
- Shared Housing strategies with “Families”
- Priorities to families with children
- Service providers receiving adulthood/ youth empowerment trainings

Rental Assistance (9)

- rent assistance
- Long term rental assistance – with no contact orders (maintain 2 households)
- Long term sustainability and rent assistance support to help people become more independent and support them possibly not reunifying
- Long-term and short-term rent assistance
- Long term rent assistance
- Long-term rental assistance
- Long Term Rental Assistance
- Sort Term Rental Assistance
- Short term rent assistance

Advice for Planners/Implementers (7)

- Find reason for houselessness
- Things to address the reason for the houselessness, not just the outcomes
- Changing the way we approach the problems in new ways with the new investments
- How things have been done vs how things should be done

- Think innovatively – look at other cities and something we haven't tried
- Overcome learned helplessness of the social workers – overwhelming with shortages
- Solid planning for more programs

Larger and Community-focused Housing Types (5)

- Larger units (large and multi-generational families)
- Get Creative - Group “families” together – chosen families – community of choice
- Shared Housing strategies with “Families”
- Group Homes
- Bigger houses to service more people - Shelter & Group

Domestic Violence-related Responses (5)

- Having a domestic violence priority & improving access for domestic violence-impacted folks
- Women w/o children have far fewer resources when fleeing abuse
- Transitional housing, placement services, and short-term rent assistance – especially for no contact orders
- Having funds to fill gaps has been helpful to have both a coordinate and uncoordinated in DV system
- Community based DV providers and outreach

Medical System-related Responses (5)

- shelter for folks who need some medical/care support either short or long-term
- Discharge intervention (enhanced transition planning from hospital & criminal justice spaces)
- Health services (mental and physical- including substance use services)
- Discharged from nursing care – may need a transition services for 2 weeks to 30 days in order to ensure long term stabilization
- Low barrier medical center

Peer Supports (4)

- Peer support services (outreach, service navigation, housing stabilization)
- Peer Support
- Supporting families through support group
- People with lived experience working in the field

Community and Faith-based Partnerships (4)

- Church missing connection
- Connections to faith communities, veteran services, etc.
- Strong partners with faith based communities
- Invest in businesses are trying to set up, especially minorities starting businesses

Assessment, Screening, and Access (4)

- Think about assessment processes and how folks are being connected to the right services at the right time - flexing more or less resources as the household needs support
- Thorough assessments and screening
- Ways to access resources other than calling in (e.g. text or online) like an app
- Lowering waitlist times, no waiting talk to people immediately

Community Engagement/Education (3)

- Need to build trust – (show we can actually help)
- Break stigma
- Buy-in from community for shelter locations – outreach to businesses, and homeowners for initial start then continual outreach as area adjusts and program develops. Involve sheriff's office, start where support is already built in.

Employment responses (3)

- Employment training & support (job training, education, workplace support)
- Supportive employment
- Connecting people with supported employment

Direct Financial Assistance (3)

- direct financial assistance
- (universal) basic income so folks can be housed while in transition and also have the space to leave unsafe situations/jobs
- Get the money/assistance to the right people

Landlord Relationships (2)

- Partnerships with Landlords
- Incentives to apartments/landlords to retain housing for COVID affected families who have mental health/substance use/developmental disability issues

Diversion (2)

- Increase diversion
- Diversion

Services: All Others (8)

- education assistance, help clients feel empowered to be self-sufficient, and programs or classes for better self esteem
- Housing placement-oriented outreach
- Veteran's assistance
- Case managers
- Social workers
- Rapid Re-housing services
- Relocation of people when they need to overhaul a current housing building – evaluate them and see if any can go into different levels of care
- Adult community services

Housing Type/Amenities: All Other (9)

- A facility like Oregon City Residential Care Center – lost a very important resource that is now not being able to be replaced
- Access to affordable and nutritious food and transportation
- Storage for belongings (not starting all over every move)
- “Golden West” building – Phase system helped success [refers to a Central City Concern supportive housing program in Portland]
- Housing for complex case situations
- Wheelchair accessible living

- Schools or other large government buildings that are already owned by state to be converted into housing.
- Age in place model
- Housing for those with arson convictions

Other (12)

- Personal connection
- Emancipating adolescents in the 25% population
- Supports to help people go to where their natural supports are
- More of the good work (things we are doing well) – invest in all categories
- Flexible funding
- Steps to prepare for permanent housing
- Stress of having to move – transition in place
- Help them stay in their community
- Displacement - Upkeep on affordable housing
- Medicare population
- Housing choice – instead of just go wherever there is some place available right now
- Transition center – access to housing because short term jail stay

SHS Survey Results: Analysis provided by CSH

There is a total of 116 respondents. The open-ended responses included multiple responses to each question and some were not answered at all. Each question was separated into a spreadsheet and each open-ended response was reviewed and coded by recurring themes. The results below are distilled and synthesized to highlight the most common themes. Demographics information was requested and those data are described below. Some responses were not able to be coded into larger groups and the responses are in quotations.

1. What is missing from the housing and homeless services provided in Clackamas County today? (n = 108)
 - Crisis services, including emergency shelter and 24/7 access
 - Affordable, quality housing
 - Mental Health and recovery services
 - Access to recovery and substance use services that meet the needs of people and are available when requested
 - Various types of housing (e.g. Transitional Housing, Recovery Housing)
 - Funding
 - Outreach

2. What factors make it hard for people experiencing homelessness and those at risk of homelessness, to receive housing and housing-related services? Do those factors change depending on the race or ethnic identity of a person seeking services, and if so how? (n = 116)
 - Untreated mental health needs, substance use/addiction
 - Lack of coordination across programs
 - System is confusing
 - Access and eligibility eliminate people or keep people from services
 - Red tape, bureaucracy
 - Low wages, lack of employment
 - Lack of transportation
 - High cost of housing
 - Not enough resources to help people
 - Long waitlists

3. If you could improve one thing about housing for people experiencing homelessness in your community, what would it be? (n = 111)
 - More affordable housing
 - Access to more housing, different types of housing
 - Streamline the process for services/housing
 - More PSH
 - More shelters
 - More resources overall
 - Better access for services (MH, substance use/addiction)
 - Homeownership track for working families
 - Support people in changing their own lives (hand up/not hand-outs)

4. What specific communities or cultural identities are not being reached through the homeless service system? (n = 104)
 - Black communities/identities
 - Indigenous communities/identities
 - Hispanic/Latino communities/identities
 - Youth
 - Women with children
 - LGBTQ+
 - All are not being reached
 - Should not be based on cultural identities
 - Don't know/unknown
 - Veterans
 - Seniors

5. Do you agree or disagree? Homeless services organizations in my community coordinate with each other when providing services to communities of color. Total responses (n = 114, 52% don't know, 28% disagree/strongly disagree, 20% agree/strongly agree).
 - Don't Know (n= 59)
 - Disagree (n= 25)
 - Agree (n = 14)
 - Strongly Agree (n = 9)
 - Strongly Disagree (n= 7)

6. How can homeless service organizations in your community better coordinate with each other when providing services for communities of color? (n = 98)
 - More outreach to those communities
 - Prioritize services for communities of color
 - Listen more to communities of color and what they want/need
 - Unknown/N/A/I don't know/unsure
 - Better, more efficient collection and use of data
 - Hire, train, develop more peer support for people of color to support representation in services
 - Should not bring color into the conversation, support all people

7. Which of the following areas would you prioritize to receive Supportive Housing funding? After reviewing the full list, please choose up to 5:
Ordering has been filtered to reflect the most responses, where the number of responses is equal, the listing is in alphabetical order.
 - Permanent supportive housing services (intensive case management, behavioral health services, life skills, cleaning, support for Activities of Daily Living) (n = 74)
 - Behavioral Health services (Mental Health support, addiction and recovery services)
Peer support services (outreach, service navigation, housing stabilization) (n = 61)
 - Year-round shelter with focus on transitioning to long-term housing (shelter with case management) (n = 54)
 - Employment training and support (job training, education, workplace support) (n = 47)

- Discharge intervention (enhanced transition planning from hospital and criminal justice spaces) Short Term Rental Assistance (n = 34)
- Peer Support Services (outreach, service navigation, housing stabilization) (n = 34)
- Long Term Rental Assistance (n = 29)
- Safety off the streets shelter (transitional shelters, basic services shelters, outdoor shelters) (n = 28)
- Coordinated Housing Access System staffing (access point for all homeless housing programs) (n = 27)
- Housing placement-oriented outreach (landlord outreach and establishing relationships) (n = 27)
- Short Term Rental Assistance (n = 26)
 - multiple responses including tiny homes, focus on what motivates people, assessments, strategic planning

8. What are the three most significant needs for people in Population A? (n = 108)

Responses have been synthesized and grouped for common themes/phrases, multiple responses were given, some responses were more than or less than three needs listed. *

- Affordable/Supportive Housing (n = 48)
- Intensive Case Management/Support Services (n = 43)
- A centralized place to access services
- Wrap around services (n = 36)
- Addiction/recovery services (n = 63)
- Mental health services (n = 42)
- Don't understand the question/population (n = 14)
- Housing navigation (n = 16)

**some responses suggest moving the groups outside of the metro area, some commented on protestors; these were not included in the groupings as there were only a few and they did not specifically address the needs of population A.*

9. What types of programs or services would you recommend investing in to make sure people in Population A can access housing and stabilize in housing? (n = 105)

- Wrap around services
- Addiction and recovery services
- Rental subsidies
- Intensive case management
- Emergency shelter
- Transitional housing
- Employment services/education/trade certifications

10. What are the three most significant needs for people in Population B? (n = 103)

Responses have been synthesized and grouped for common themes/phrases, multiple responses were given, some responses were more than or less than three needs listed.

- Stable housing (n = 67)
- Employment/increased income (n = 58)
- Rental assistance and eviction prevention (n = 52)
- Case management services (n = 28)

- Child care (n = 36)
11. What types of programs or services would you recommend investing in to make sure people in Population B can access housing and stabilize in housing? (n = 100)
- Addiction/recovery services
 - Transitional housing
 - Wrap around services
 - Mental and physical health treatments
 - Child care and education
 - Eviction prevention
 - Employment assistance
 - Basic income
12. What would you like to see in a plan coordinating access to services across the tri-county region? What are your top priorities? (n = 96)
- Focus on Clackamas not just metro areas
 - Common data (data elements and systems) and shared forms
 - Use the same metrics across the tri-county region
 - No wrong door for Coordinated Housing Access and other homeless/housing services
 - Building more affordable housing, coordinated on units and location
 - Flexible funding pools
 - Don't know/unsure/unknown
13. How should the County establish procurement standards with contracted agencies? What are key qualities for assessing which agencies/programs receive contracted funding? (n = 96)
- Investment in culturally specific organizations
 - Housing placement/housing retention success demonstrated
 - Organizations with a proven track record
 - Assess services provided and geography covered
 - BIPOC owned or operated/with staff that represent populations served
 - Competitive application process
 - Experience, with the target population
 - Mission driven
 - Financially stable organizations
14. As we continue engaging the community around this plan over the course of the next ten years, what specific engagement strategies would you recommend we utilize to ensure we engage Black, Indigenous, People of Color (BIPOC), and other marginalized community members? (n = 98)
- Outreach to these groups
 - Ask those community members what strategies they recommend
 - Fund organizations working with marginalized community members
 - Pay people of color and people with lived expertise for their time and experience
 - Work with culturally specific, community-based organizations on the planning
 - Stop categorizing by race/ethnicity, focus on all community members

- No opinion, N/A

15. What other questions would you have liked us to ask? Do you have any additional comments to add? (n = 70)

- More support for students
- Government programs increase dependency on government programs
- No other questions, N/A
- Thank you for centering equity
- How do organizations apply for these funds?
- Ensure funds support tri-county, not just Metro regions
- Great job, covered all bases

16. What perspectives do you bring as you answer these questions? (Select all that apply) (n = 45)

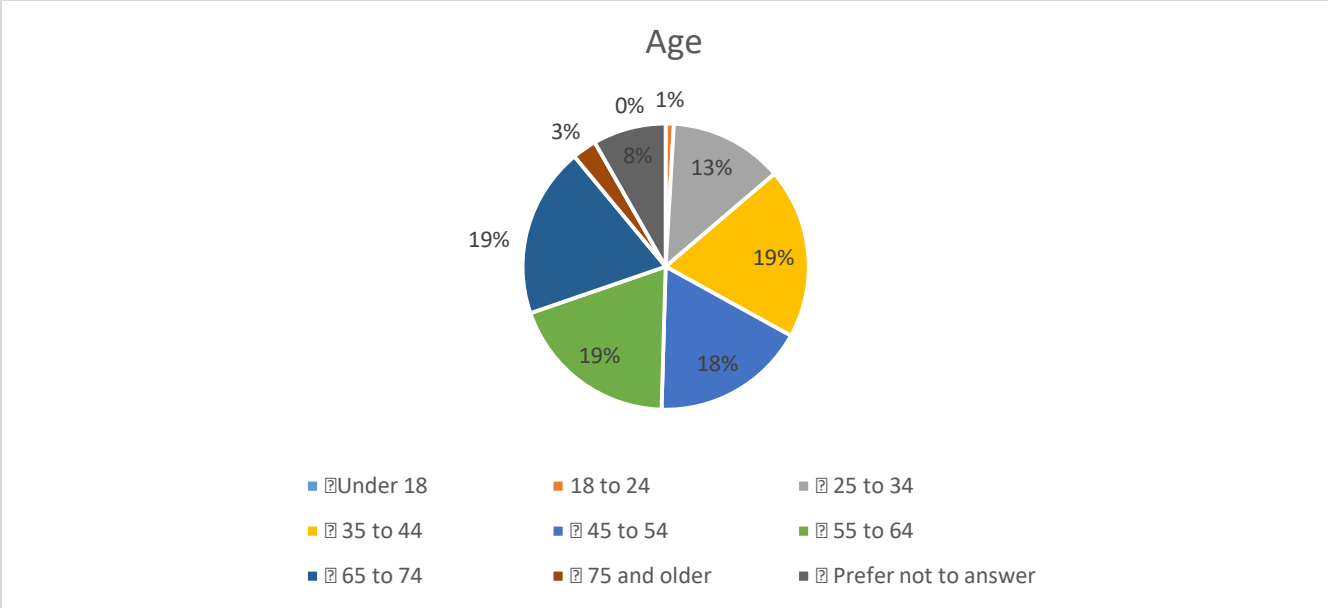
Some respondents selected more than one, some did not select any.

- Person with lived experience of homelessness/severe housing insecurity (n = 31)
- Direct service provider in a community based homeless services organization (n = 28)
- Manager in a community based homeless services organization (n = 11)
- Community volunteer (n = 33)
- Government employee (n = 32)
- Business owner/manager (n = 13)
- Health care provider (n = 17)
- Faith Community Member (n = 17)
- Philanthropy (n = 7)
- Other (please specify) * (n = 44)
 - Multiple responses including: retired person, multiple roles including government and non-profit, peer support, program evaluator, conducted “5-year intense study of Portland’s homeless”, concerned citizen, case manager, educator, lawyer, law enforcement, DV survivor, African American woman, among others,

Demographics: Majority of respondents identify as white or Western European women, who are primarily English speakers between the ages of 35 and 64.

17. Which of the following ranges includes your age? Youth under 18 are encouraged to apply with parent or guardian permission. (n = 108)

- Under 18 (n = 0/0%)
- 18 to 24 (n = 1/1%)
- 25 to 34 (n = 14/13%)
- 35 to 44 (n = 21/19%)
- 45 to 54 (n = 19/17%)
- 55 to 64 (n = 21/19%)
- 65 to 74 (n = 21/19%)
- 75 and older (n = 3/3%)
- Prefer not to answer (n = 8/7%)



18. How do you identify with the following? (Check all that apply) Several respondents selected multiple responses.

- Man (n = 19)
- Woman (n = 85)
- Transgender man/trans man/female-to-male (FTM) (n = 0)
- Transgender woman/trans woman/male-to-female (MTF) (n = 0)
- Genderqueer/gender nonconforming neither exclusively male nor female (n = 0)
- Cisgender (n = 15)
- Non-binary, genderqueer, third gender (n = 1)
- Straight or heterosexual (n = 37)
- Lesbian or gay (n = 8)
- Queer, pansexual, and/or questioning (n = 3)
- Don't know (n = 0)
- Prefer not to answer (n = 1)
- Additional gender or sexuality not included above (n = 2) *

*Open ended responses: "transgender" and "only 2 of these are real. you can call yourself a unicorn but if your DNA says you're Male that's what you are."

19. What are your gender pronouns?

- She/her/hers (n = 78)
- He/him/his (n = 18)
- They/them/theirs (n = 3)
- Other (please specify) (n = 8)
 - "you can't dismiss DNA"
 - "Whatever gender pronoun the individual cares to address me with is accepted with kindness."
 - "The standard pronouns for a woman"
 - "Prefer not to say"
 - "Oh for f*^#@s sake!"

- “I don't do pronouns, its the same as blindly thank a veteran for their service without understanding who they are and if they are proud of that service”
- “I don't understand this question”
- “call me by my name”

20. Which of the following describes your racial or ethnic identity? Please check ALL that apply.

Not all respondents selected multiple answers, some declined to respond.

- American Indian (n = 5)
- Alaska Native (n = 0)
- Canadian Inuit, Metis, or First Nation (n = 1)
- Indigenous Mexican, Central American, or South American (n = 1)
- Asian Indian (n = 0)
- Chinese (n = 1)
- Filipino (n = 0)
- Hmong (n = 0)
- Japanese (n = 1)
- Korean (n = 0)
- Laotian (n = 0)
- South Asian (n = 0)
- Vietnamese (n = 0)
- Other Asian (n = 0)
- Black and African American (n = 3)
- African American (n = 0)
- African (Black) (n = 0)
- Caribbean (Black) (n = 0)
- Other Black (n = 0)
- Central American (n = 1)
- Mexican (n = 3)
- South American (n = 0)
- Other Hispanic or Latino/a/x (n = 2)
- Middle Eastern (n = 2)
- North African (n = 1)
- Eastern European (n = 9)
- Slavic (n = 4)
- Western European (n = 46)
- Other (White) (n = 43)
- Chamorro (n = 0)
- Guamanian (n = 0)
- Micronesian/Marshallese (n = 0)
- Palauan (n = 0)
- Native Hawaiian (n = 0)
- Other Pacific Islander (n = 1)
- Don't Know (n = 0)
- Don't want to answer (n = 7)
- Other (please list) (n = 15)
 - White-Born in Portland, Oregon

- White
- White
- White
- Portuguese
- Plain old white American
- Pink
- Other
- Old white lady
- It's complicated
- Italian, French, German, Irish
- I'm swiss & Italian, grandchildren are black
- I am a white native American. I was born here.
- Eastern and Western European
- Scottish, Irish
- Open Ended Response (n = 40)
 - No/NA (n = 16)
 - White/White American (n = 13)
 - Black (n = 1)
 - Human (n = 2)
 - Irish (n = 1)
 - Norwegian (n = 1)
 - No, ethnic identity is over used and pushed on the public. Since I was born here, identity should be American! (n = 1)
 - Mexican (n = 2)
 - Latino (n = 1)
 - Eastern European (n = 1)
 - Mixed (n = 1)

21. What is the most frequent language spoken in your home?

- Arabic (N = 0, 0%)
- Cantonese (N=1, 1%)
- English (N=93, 94%)
- Japanese (N = 0, 0%)
- Korean (N=1, 1%)
- Mandarin (N = 0, 0%)
- Russian (N = 0, 0%)
- Spanish (N= 3, 3%)
- Ukrainian (N = 1, %)
- Vietnamese (N = 0, 0%)
- Other (please specify)

Which of the following best represents your annual household income before taxes?

Appendix I

Support Homeless Services ---



HERETOGETHER

January 19, 2021

Jill Smith, Richard Swift, and Vahid Brown,

We hope this letter finds you well.

First, let me again say thank you for taking the time to join us last month for a productive conversation with HereTogether coalition members and service providers. Participants appreciated the opportunity to have an open and frank discussion with Clackamas County staff about the County RFP and contracting process.

The passage of the Supportive Housing Services measure provides our region with a once in a generation opportunity to address our homeless crisis with dedicated resources that approach the scope of the need. As the funding stream reaches its full capacity in the coming year, Clackamas County will see available resources for homeless services increase exponentially. Along with the increase in resources comes the need to increase the County's capacity to deliver services.

As a community, we all have a stake in implementing this measure correctly, and a shared responsibility to work together and ensure we're achieving the equitable outcomes promised to the voters. It is, therefore, incumbent on all of us to take a moment, pause, and ask ourselves what we should be doing differently to serve our communities better as we leverage this historic opportunity.

The good news is we know what works: housing plus services ends people's homelessness. The challenge now is scaling up the delivery of services that address chronic homelessness. Our region will need to significantly expand the number of case workers, mental health and addiction recovery professionals, and frontline peer support specialists.

To better understand the challenges and opportunities providers foresee as they contemplate their role in this important work, HereTogether hosted a group discussion with nearly 40 individuals representing 30 service providers. The focus of the discussion was the government procurement process that all organizations must navigate if they plan to provide services under the Supportive Housing Services measure.

The attached memo outlines the discussion around and recommendations for improving the County's contracting and homeless service delivery system in four key areas (*italicized in the bullet points below.*) While each section provides background on identified issues and detailed recommendations, we have synthesized the following key takeaways from each.

It is worth noting that the summary and recommendations that follow do not reflect a formal position by the coalition. Instead, we are sharing the feedback provided during the group

discussion for you to consider as you move forward with developing your initial local implementation plan for this 10 year measure.

- **Reduce administrative burden**
 - **Joint application and standardized reporting process.** Many providers will be working regionally and therefore need to enter into contract with each jurisdiction to provide the same services. Creating a region wide SHS application and reporting process would help reduce administrative burden and costs.
 - **Paperwork reduction.** Current invoicing practices require a paper trail that could be reduced by relying on internal audits and generally accepted accounting practices.
 - **Reimbursement vs upfront payments.** The current model of reimbursement for approved expenses requires the provider to front program and staffing costs. This is unsustainable, especially given the substantial staffing increases that will be required to fulfill the contracts. Providing payments for contracted services in advance and reconciling the accounts at the end of the contract period is the preferred approach.

- **Program delivery costs.** Costs associated with employee recruiting, training, and the HR/admin support necessary to significantly grow the service provider workforce must be covered by the contracts. Nonprofit organizations must be able to compete with wages paid by the public and for profit sector in order to attract and retain qualified workers.

- **Timelines for scaling up:** To prepare for SHS implementation, organizations need an overview by March 2021 of what services the County plans to fund. The County is in a position to be a strong partner in this work. Service providers expressed interest in and support for strengthening the collaborative partnership.

There is great energy and enthusiasm for the work ahead, and we have listed a number of **CBO recommendations** that came from the discussion.

We look forward to the continued partnership.

Sincerely,

Angela Martin
Executive Director

Community Based Organization (CBO) Listening Session

Section I: Reducing Administrative Burden

I. Improving on the application process

Suggestions from breakout groups:

- **Get all three counties together to create a joint, simple shared application process:** Community Based Organizations (CBOs) will be delivering services regionally and thus will need to enter into contracts with multiple jurisdictions to deliver similar programs. Having a cross jurisdictional, master application where approximately 70 percent of the information is shared regionally will streamline the application process and reduce waste.
- **Create opportunities for CBOs to apply for and receive multi-year contracts.**
- **Provide notice of award with as much lead time as possible:** This will help organizations increase their budgets, hire new staff and get approval from their boards if necessary
- **Simplify the process by looking at previous RFPs when considering contracts:** Looking at evidence and outcomes from previous RFPs with the County will reduce redundancy and save taxpayer money, especially for organizations with longstanding relationships with the County.
- **Create a single listserv for RFPs across County departments.**
- **Do not require a financial match from the nonprofits to receive SHS funds.**
- **Allow smaller organizations to pool together to purchase liability insurance, or be subrecipients with larger organizations:** Many small organizations don't have capacity to purchase insurance premiums required for contracting, but with collaboration might be able to jointly purchase insurance. Where possible, move away from template contracts that require small organizations to purchase insurance they don't need (e.g. auto insurance for organizations that don't own cars, professional liability insurance for organizations that don't have licensed social workers on staff.)
- **Create an equal playing field for all RFP respondents.** Whether a public entity (including the County), private or nonprofit organization, the criteria for awarding a contract should be transparent and equally applied to all parties.

II. Reimbursements vs. up front payments

Background:

The County's model of providing reimbursements to CBOs rather than funding programs up front places a unique burden on service providers. ***One service provider described this practice as, "providing government a no interest loan for a couple months or more."*** This practice often shuts smaller providers out of the process and limits the amount larger organizations can apply for because there is a ceiling on how much capital they can front.

Suggestions from breakout groups:

- ***Move from a reimbursement model to one that offers up front investments*** and adjusts future payments according to what budget items on the contract have been spent.
- ***Model after other jurisdictions that are contracting in a provider-oriented way.*** This could work in various ways. For example:
 - There are DHS programs that invest early in a service they wanted to see, giving capital and transition funding to help a CBO staff up.
 - CARES Act grants provided up front funding with a requirement to pay back what is unspent.
 - Many federal grants invest up front and allow CBOs to draw down and reconcile quarterly.

III. Paperwork Reduction

Background:

CBOs highlighted three primary issues with reporting and invoicing:

- They often spend more time administering contracts than they are awarded in their administrative costs.
- Reporting requirements vary because they are not standardized across County departments.
- The County currently requires every receipt down to the last dollar before providing a reimbursement, which can take significant staff time away from providing services. Conversely, state and federal contracts often require a line item invoice and for the organization to provide proper documentation on request or during an audit, rather than submission of every receipt.

Suggestions from breakout groups:

- ***Coordinate reporting requirements across RFPs and jurisdictions by creating regional data collection, RFP and reporting systems*** to reduce inefficiencies.

- **Rely on organizational internal controls and audits** for receipts. If that is not possible, provide more funding in the administrative costs to help organizations absorb this work (potentially one or more FTE focused on reporting.)
- **Create transparent agreements on invoicing and reporting in contracts.**

Section II: Program Delivery Costs

Background:

Among providers who have performed services under Clackamas County contracts, a common complaint was the partial reimbursement rates. Nonprofits are not in a position to subsidize the cost of delivering services, which includes overhead, administrative costs and competitive wages. Underfunding the contracts is unsustainable for organizations of all sizes, and also raises major equity issues, especially if the County is serious about developing and maintaining relationships with grassroots organizations and culturally specific providers.

Funding total program costs is one step the County could take to ensure quality work and help strengthen the infrastructure of community based organizations.

This practice of underfunding the contracts has had the following impacts:

- Led several organizations to not pursue contracts with Clackamas County.
- Required organizations to find funding elsewhere to absorb the costs to deliver services, bring staff up to living wages, and pay for contract reporting requirements, IT services, finance and accounting, human resources, insurance, rent, etc.
- Required nonprofits to front administrative expenses to get new programs up and running. Organizations without reserve funds—which are often smaller, and/or provide culturally or population specific services—have been unable to participate as a result.
- Led some providers based in Multnomah County to use grant money from Multnomah County to serve Clackamas County residents. These providers noted they will not be able to bid for Clackamas County contracts that do not cover the total cost of providing services.

Suggestions from breakout groups:

- **Consider “true and accurate cost” for program delivery in RFPs:** This includes everything it takes to cover program overhead and for the staff to be successful: administrative costs, living wages, benefits, technology, technical assistance, training, funding for reporting, etc. The County can thereafter decide whether to invest in the true cost or a portion of the cost.
- **Invest in workforce development and organizational capacity building.**
- **Include the admin fees up front** in the contract and work with service providers to negotiate admin fees.

- **Provide more flexible funding and unrestricted revenue in contracts.** In doing so, agencies on the ground can be nimble and better able to meet their clients' changing needs. This could be addressed either by including adequate flexible funding resources or a more streamlined amendment process.
- **Instead of rejecting an entire proposal that may exceed budget parameters** consider line item edits and requests for amendments.
- **Honor Federal Indirect Costs:** If organizations have already negotiated an indirect cost rate with the federal government, honor that rate in County contracts. For organizations that do not have a negotiated indirect cost rate, work with CBOs to come up with a fair rate to identify admin costs for a contract.

Section III: Scaling up and the timeline for the work ahead

Background:

Many service providers are eager to formally begin delivering services in Clackamas County, or expanding their footprint. **They, however, expressed concern about the timeline and would like to be informed of the County's needs and potential investment strategies as early as possible** to ensure they are also planning strategically for measure implementation.

Suggestions from breakout groups:

- **Share RFPs regionally** so service providers can prioritize their planning by understanding what's being sought in all three counties.
- **Provide early notification process.** Service providers said they needed to know what will be available by March 2021 to be ready to apply for RFPs by July 2021.
- **Provide high level hints as soon as possible.** Providers can plan better if the County can share what they'll need in broad strokes (e.g. How many shelters does Clackamas County plan to open in the next year or two? How many FTE outreach staff will be brought on? How will the County prioritize long term vs. short term rent assistance? Etc.)
- **Be transparent about how RFPs are going to be announced and decided.**
- **Take a road show.** Meeting with CBO staff and boards will help County staff share the County's vision for implementation and help them get a better understanding of the service landscape across the region.
- **Engage service providers to build out the new system—and do it fast.**
- **Help CBOs increase their capacity** to ameliorate risk of burnout and high staff turnover by either directly providing the following services to CBOs or funding them in contracts:
 - **Trainings** including: Hiring, Onboarding and Training protocols; Equity in the workplace; Equity in homeless services; COVID protocols; Providing Permanent Supportive Housing and supportive services; HIPAA Compliance; Mandatory reporting; Avoiding employee burnout and turnover, etc.

- **Business development and administrative support** including office space, remote work tools, invoicing support, budgeting support, etc.
- **Help CBOs develop capacity plans** in advance of the increased services to identify risks and requirements for the work ahead (something one Multnomah County provider said the Joint Office has helped them with.)

Section IV: CBO recommendations for the collaborative work ahead

There are expert providers in Clackamas County and across the region who would like to better collaborate with the County and each other to improve the way they deliver services. **The providers at the panel had the following recommendations for how to continue to create a strong, collaborative CBO ecosystem:**

- **Convene roundtables between County leaders and CBOs that will:**
 - **Build a new service delivery system** through intensive design sessions. Use this as an opportunity to do things differently and think big.
 - Tell the story of the success of the measure by **developing performance metrics**.
 - Give the County an opportunity to better understand CBO work and gain a better **understanding of equity work** that is required for the measure.
- **Fund community education and engagement.** The public engagement component of this work is critical to combating myths and misinformation about causes and solutions to homelessness. A well-conceived community engagement program will build public support for the County's work to end our chronic homeless crisis.
- **Develop strategies to help organizations at all levels increase capacity. Providers identified three categories of CBOs with unique needs:**
 - **Category I: Support established providers that are already doing great work in the County:** Support these providers to increase the work they're doing with the same care and attention used to attract new providers. Both types of providers are needed.
 - **Category II: Strategically attract and retain established providers from other counties that want to be complementary:** Several Multnomah County service providers said they are excited to move to Clackamas County, but only want to do it in collaboration with existing providers and only by better understanding the needs of county residents and how they can provide unique, complementary services.
 - **Category III: Help smaller providers in the County collaborate and cultivate partnerships:** Several current Clackamas County providers don't have the capital or overhead to drastically increase services, but feel like—with a strong

strategic vision and understanding of the landscape—they can lean on each other, grow together and fit together. For example:

- Several organizations mentioned that they would like to work together to develop a single stop co-location to share costs and provide unique services.
 - These organizations would also be interested in sharing staff members or services through formal agreements/Memorandums of Understanding. This has worked in Multnomah County where, for example, the CBO JOIN leads a collaborative [mobile permanent supportive housing team](#) to deliver Permanent Supportive Housing services in non-traditional buildings. Nonprofits involved in this mobile PSH team include JOIN, The Urban League, El Programa Hispano and Cascadia Behavioral Health.
- ***Use this as an opportunity to learn from what’s working around the region, around the country and around the world:***
 - Take the opportunity to learn from best practices, implement evidence based programs and not be afraid to try new things. Providers can innovate when their funds are flexible.
 - Develop interagency partnerships like mental health community treatment ACT Teams (Assertive Community Treatment) and multidisciplinary AHRT Teams (Assertive Housing Reintegration).



Attendees at 12/15/2020 HereTogether/Clack Co Roundtable:

Name	Organization	Overview of Services	Provides Services in Clack Co?
Two Foxes Singing (Nunpa)	Ant Farm	Youth and family services, programs in school system	Yes but outside UGB
Mellani Calvin	ASSIST Program	Social Security program assistance	No - primarily serve Washington County but can serve other counties
Michael Nomina	Cascadia Behavioral Health	Provide a number of services, integrated mental health and addiction services primary care and housing	Yes
Debra Mason	Clackamas Service Center	Fighting hunger and poverty by providing services around food hunger relief, supportive services	Yes
Tabitha Ajami	Clackamas Service Center	See above	Yes
Angie Drake	Clackamas Women's Services	Services for Domestic and Sexual Violence Survivors	Yes
Diana Camarillo	Clackamas Women's Services	Latina services coordinator providing services to victims of abuse	Yes
Melissa Erlbaum	Clackamas Women's Services	Serve survivors of domestic and sexual violence, prevention work in schools	Yes

Name	Organization	Overview of Services	Provides Services in Clack Co?
Scott Davis	Clackamas Women's Services	See above	Yes
Bridget Dazey	Clackamas Workforce Partnership	Workforce development board, convenor between business private sector, public, education	Yes
John Miller	Consultant	Work with Clackamas County on Service Improvement	Yes
Caleb Coder	Cultivate Initiative	Community engagement, workforce development, healthcare services, alternative housing	Not yet, but would like to
Richard Flamm	Do Good Multnomah	Serve primarily veteran focus	Yes
Carol Salter	Easter Seals	Provide housing services to homeless veterans	Yes
Adam Jenkins	Ecumenical Ministries of Oregon	Provide stable housing for unaccompanied youth	Yes
Michael Sterner	El Programa Hispano	Housing Services (culturally specific)	Not that much (but would like to)
Andy Gobel	Greater Good Northwest	New nonprofit mirroring Do Good Multnomah for non veteran population	Yes
Jaclyn Sarna	Hacienda CDC	Affordable housing developer and social service provider (culturally specific)	Yes
Sue Vu	Immigrant and Refugee Community Organization (IRCO)	Serve immigrant/refugee sexual violence/domestic violence survivors	Yes

Name	Organization	Overview of Services	Provides Services in Clack Co?
Andy Nelson	Impact Northwest	Provide housing services & preventing homelessness	Yes
Jana Hack	Impact Northwest	(see above)	Yes
Anthony Canstaneda	Latino Network	Transform life of youth, families, students (culturally specific)	Yes -Tri County
Corina Daugherty Calhoun	Lifeworks Northwest	Outpatient residential mental health and chemical dependency services for adults and children	Yes
Brandi Johnson	Love One	Provide free laundry, showers, food, wrap around support	Yes
Andrew Brown	Metro Home Share	Match People who have housing needs with those who have extra room in their house	Yes (not on contract)
Sean Suib	New Avenues for Youth	Work with youth experiencing and at risk of homelessness	Yes -one program in Clackamas County
John Trihn	New Narrative (formerly Luke-Dorf)	Provide behavioral health services	Yes serve individual in Clackamas County if they come to locations in Portland/Tigard
Rose Fuller	Northwest Family Services	Serve victims of crime, culturally specific domestic violence shelter and other housing and support services	Yes
Julia Doty	Northwest Housing Alternatives	Affordable housing provider	Yes
Peter Rosenblatt	Northwest Housing Alternatives	Create opportunity through housing, provide services	Yes

Name	Organization	Overview of Services	Provides Services in Clack Co?
Simon Fulford	Parrott Creek Child and Family Services	Provides support to children and families in child welfare and juvenile justice	Yes
Kymberly Horner	Portland Community Reinvestment Initiatives	Affordable Housing Provider	No
Brandi Tuck	Portland Homeless Family Solutions	Help families with children into stable housing	Yes - services right on Multnomah/Clackamas county line
Sara Gross Samuelson	Storyline Community & Clackamas Land and Housing Coalition	Faith based community meets the needs of their neighborhood Coalition of faith institutions leveraging land for housing needs or neighbors	Yes
Martin Gant	The Fathers Heart	Services for those on the streets and in poverty	Yes
Tony Bernal	Transition Projects	Provide services and housing development	Small amount of Services Clackamas County
Tyler Mac Innis	Welcome Home Coalition	Advocates for affordable/supportive housing in tri-county	Yes (through coalition members)
Jill Smith	Clackamas County	Director of Housing & Housing Services	
Vahid Brown	Clackamas County	Housing Policy Coordinator	
Abby Ahern	Clackamas County	HMIS & COC Lead	
Erin Fernald	Clackamas County	Office Assistant	

Appendix B: Questions asked in small groups

I. Past experiences in contracting


- Has your organization ever applied for a contract with Clackamas County?
 - **Prompts if no** (Why? Did your organization consider it but decide not to before application, why? What were the decision factors - application process, grant amount, grant restrictions/requirements, capacity? Has your organization applied for contracts with the other counties?)
 - **Prompts if yes** (Was the contract approved? How would you rate the various stages of the process - application, approval, reporting? How does the application process compare to the other counties? What would you like to see changed - be specific about what stage of the process.)

II. Designing the Perfect System

- What elements would you recommend including/avoiding in the Regional SHS contracting protocol? Discuss each phase of the process:
 - Notification
 - Application
 - Review/approval
 - Award amount - calculating what is covered and the rate
 - Reporting
 - Other
- What do you need to successfully expand your work in Clackamas County? (Think big)

Clackamas County Continuum of Care & Coordinated Housing Access: Race & Ethnicity Equity Analyses

July 2019



What is a Race & Ethnicity Equity Analysis?

- ▶ Statistical comparison of the race and ethnicity distribution of actual program participants against an expected race and ethnicity distribution
- ▶ Expected race and ethnicity distribution is calculated using distribution data from a known population (e.g., Census data)
 - ▶ For example, a program serves 1,000 people in a County where Census data indicates that 10% of the population identifies as Hispanic or Latino. Based on that information, you would expect that approximately 100 program participants would identify as Hispanic or Latino
- ▶ The actual and expected race and ethnicity distributions are compared using a statistical analysis to determine how similar they are to each other.
 - ▶ Chi Square Test



Why Conduct a Race & Ethnicity Equity Analysis?

- ▶ Better understand who you're serving
 - ▶ Are your services reaching the community as you might expect?
 - ▶ Are your services reaching people in an equitable way?
- ▶ Identify trends and patterns
 - ▶ Are there populations of people who you are consistently serving more or less than expected?
- ▶ Develop focused action steps
 - ▶ Outreach to specific populations within the community
 - ▶ Assess for organizational and/or systemic bias that may have an effect on housing program access and outcomes



Notes on Methodology

- ▶ For comparison, race and ethnicity distribution data was utilized from the following sources:
 - ▶ Clackamas County Poverty Data (2017, Census.gov)
 - ▶ Clackamas County Supplemental Nutrition Assistance Program Homeless Data (2016-2018, SNAP)
 - ▶ There were 318 people included in the SNAP total for whom race and ethnicity were unknown
 - ▶ Coordinated Housing Access (CHA) Assessment Data (1/1/17-12/31/18. HMIS)
- ▶ Multi-Racial Data
 - ▶ From raw data, people who marked 2 separate race categories were categorized as “Multi-Racial” in the analysis
 - ▶ SNAP data did not include a Multi-Racial category



Notes on Methodology



- ▶ All chi square analyses were conducted at the $p \leq .05$ level
 - ▶ When there is a statistically significant difference found between actual and expected distributions there is less than a 5% probability that it is due to chance.
- ▶ Results of the analyses only indicate whether a statistically significant difference between the actual and expected distributions is found.
 - ▶ The results do not indicate *why* there is a difference; only that a difference exists
 - ▶ There may be many factors that contribute to differences found between the actual and expected distributions in these analyses, including (but not limited to):
 - ▶ Historical and institutional inequities
 - ▶ Systemic/organizational factors
 - ▶ Error in data entry or measurement



Notes on Methodology

- ▶ Bar Graphs

- ▶ Separated results for people who identify as White and those who identified as People of Color
- ▶ Separation of results was only due to scale differences (significantly more people who identify as White than any other race or ethnicity category)
- ▶ Without separation, details of the analyses and results are not visible for categories that include People of Color

- ▶ Distribution Tables

- ▶ Each cell should be read as the percentage of the column total
- ▶ For example, for the In Housing Programs column 14.8% of all people in housing programs between 2016 and 2018 identified as Multi-racial

- ▶ Definitions

- ▶ Exits to Permanent Housing: Exits to permanent housing destinations as listed in HMIS
- ▶ Exits to Temporary Housing: Exits to temporary housing or unknown destinations as listed in HMIS

Race and Ethnicity Raw Data (n)

	CHA Assessments (2017-2018)	In Housing Programs (2016-2018)	Exits to Permanent Housing (2016-2018)	Exits to Temporary Housing (2016-2018)
White	1315	1200	561	194
Black/African American	110	133	55	31
Native American/ Alaska Native	86	56	33	10
Asian	15	16	13	1
Native Hawaiian/ Pacific Islander	19	5	0	2
Multi-Racial	117	250	125	42
Hispanic/ Latinx	194	285	157	35
Unknown	69	34	12	3

Race and Ethnicity Distributions

	County Poverty (2017)	SNAP Homeless (2016-2018)*	CHA Assessments (2017-2018)	In Housing Programs (2016-2018)	Exits to Permanent Housing (2016-2018)	Exits to Temporary Housing (2016-2018)
White	87.6%	83.7%	76.0%	70.8%	70.2%	69.0%
Black/ African American	1.6%	3.0%	6.4%	7.9%	6.9%	11.0%
Native American/ Alaska Native	1.6%	1.7%	5.0%	3.3%	4.1%	3.6%
Asian	4.3%	0.5%	0.9%	1.0%	1.6%	0.4%
Native Hawaiian/ Pacific Islander	0.6%	0.5%	1.1%	0.3%	---	0.7%
Multi-Racial	4.3%	---	6.8%	14.8%	15.6%	15.0%
Hispanic/ Latinx	15.0%	5.0%	11.2%	16.8%	19.7%	12.5%

* Race and ethnicity were unknown for a total of 318 people included in SNAP data between 2016 and 2018



Indications of Disparities

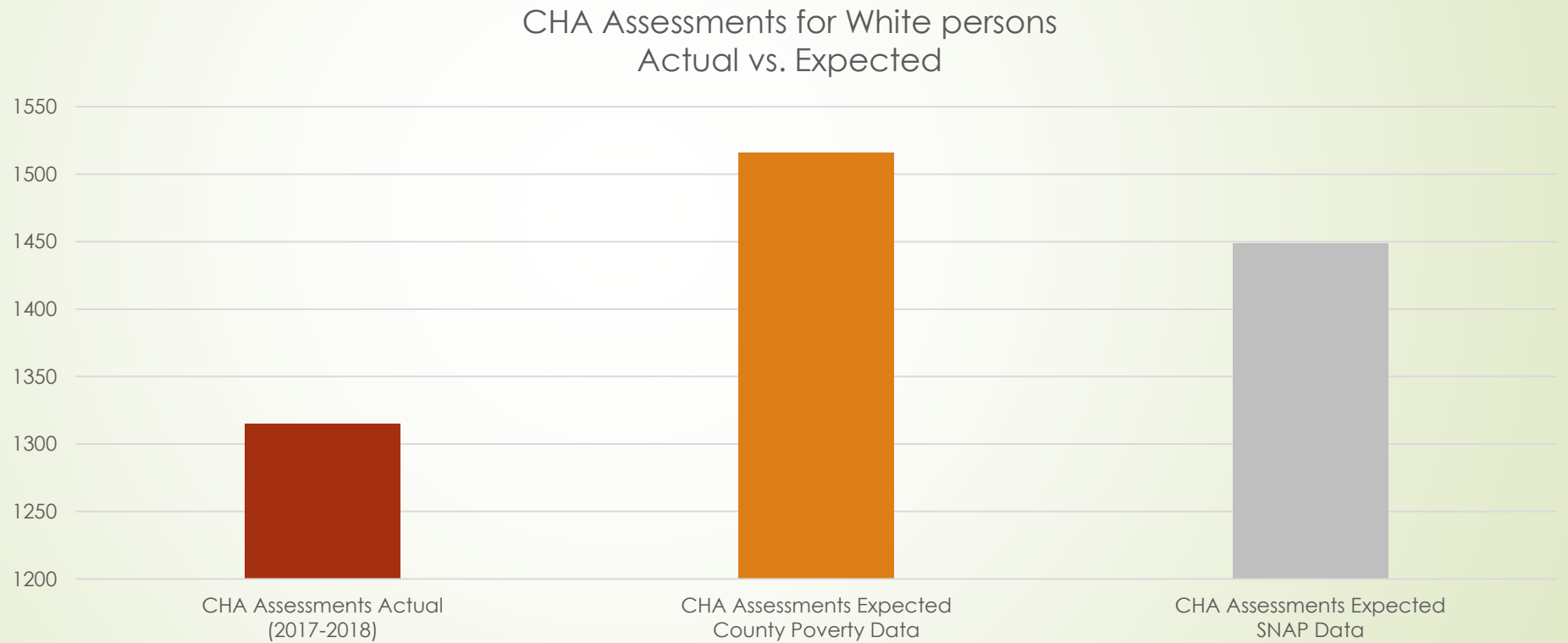
- ▶ Notice the consistency (or lack of) of race and ethnicity distributions across the categories (County Poverty, SNAP, and all CHA categories)
 - ▶ The percentage of people who identify as White is lower within all CHA-related categories (assessments, in housing programs, and exits from housing programs) compared with distributions for County Poverty and SNAP data.
 - ▶ The percentage of people who identify as Black or African American is higher in all CHA-related categories compared with distributions for County Poverty and SNAP data.
 - ▶ Also note the increase in the percentage of people who identify as Black or African American and Native American/Alaska Native in the Temporary Exits distribution compared with other CHA-related distributions.
 - ▶ The percentage of people who identify as Asian is lower within SNAP and all CHA-related categories compared with the distribution for County Poverty data.

CHA Assessments

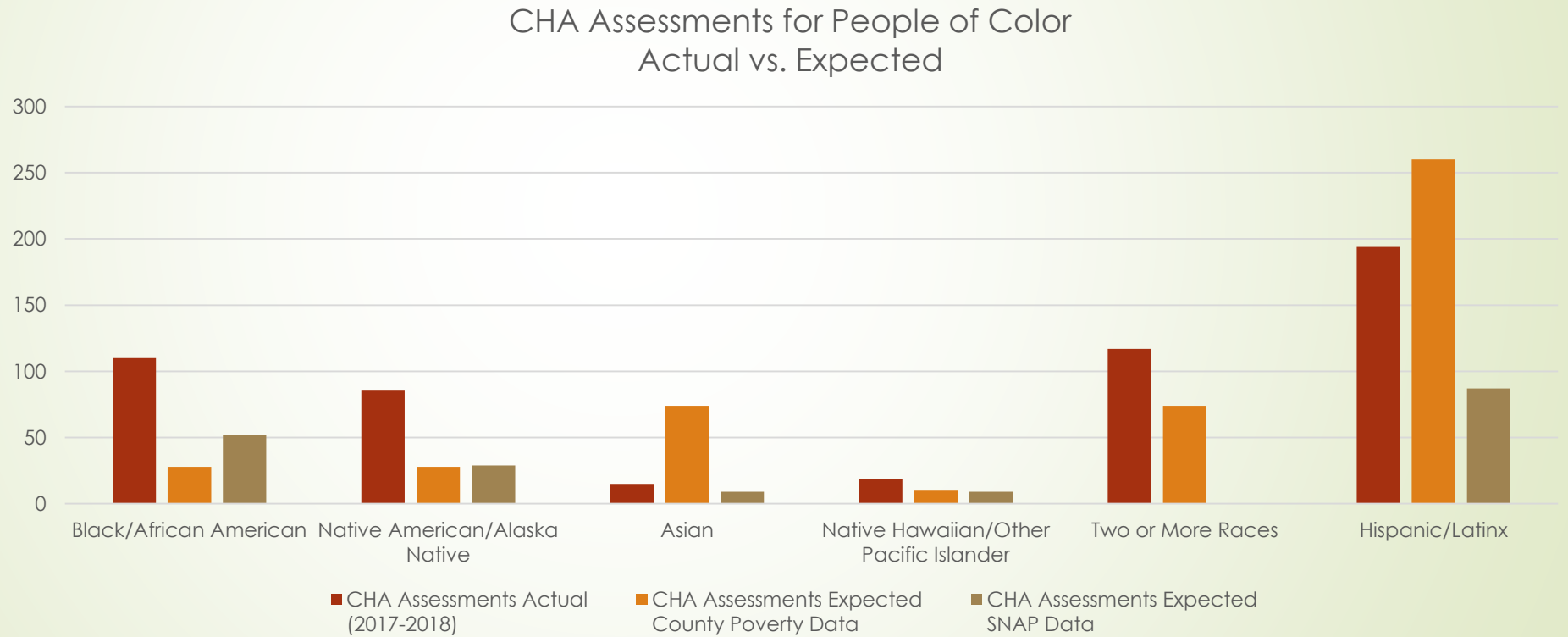
Actual vs. Expected Distributions

	CHA Assessments Actual (1/1/17-12/31/18)	CHA Expected Poverty Data	CHA Expected SNAP Data
White	1315	1516	1449
Black/African American	110	28	52
Native American/ Alaska Native	86	28	29
Asian	15	74	9
Native Hawaiian/ Pacific Islander	19	10	9
Multi-Racial	117	74	---
Hispanic/ Latinx	194	260	87

CHA Assessments 2017-2018 for White Persons: Actual vs. Expected



CHA Assessments for People of Color 2017-2018: Actual vs. Expected





CHA Assessments

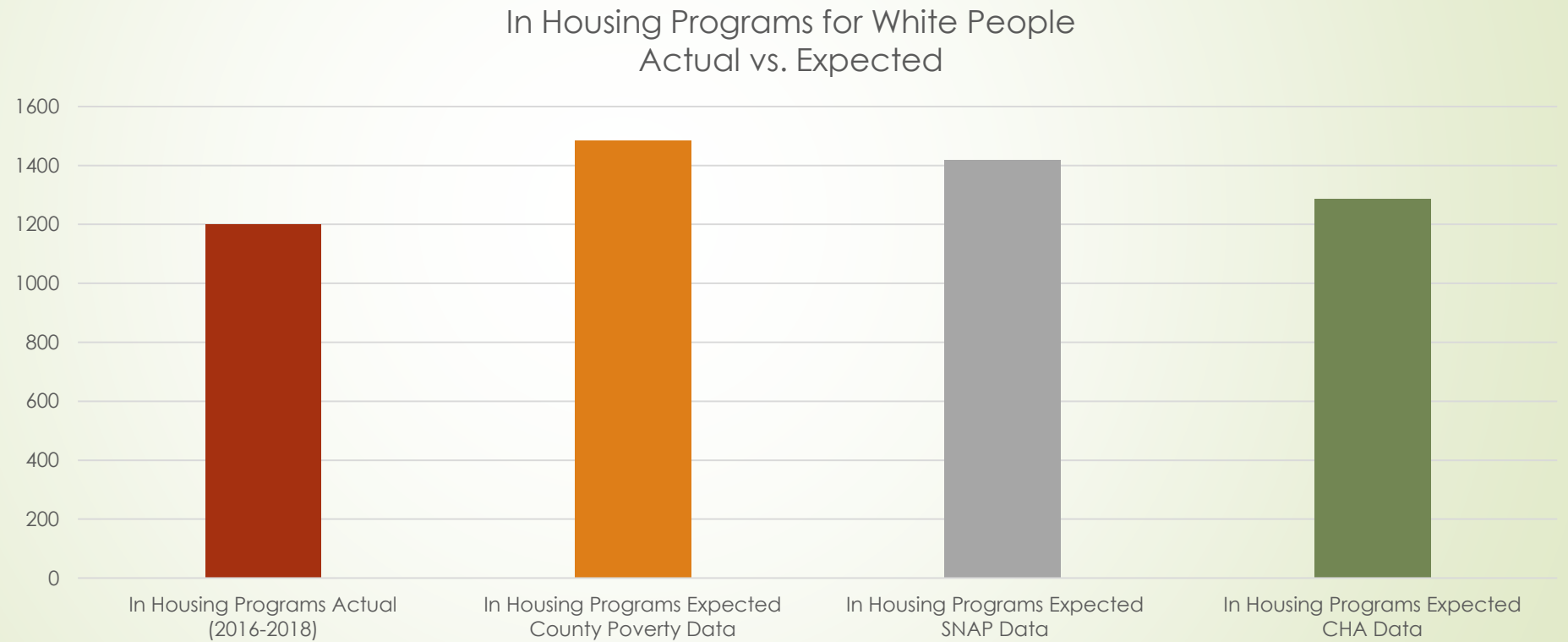
Race & Ethnicity Chi Square Analyses

- ▶ Used County poverty data and SNAP homeless data to generate expected race and ethnicity distributions
- ▶ Chi square analyses were run comparing actual race and ethnicity distribution against the expected distributions
 - ▶ All analyses statistically significant (i.e., differences not just due to chance)
- ▶ Greatest contributors to differences between actual and expected distributions include:
 - ▶ More than expected Black/African American & Native American/Alaska Native individuals (Poverty & SNAP)
 - ▶ Fewer than expected Asian individuals (Poverty only)
 - ▶ More than expected Hispanic/Latinx individuals (SNAP only)

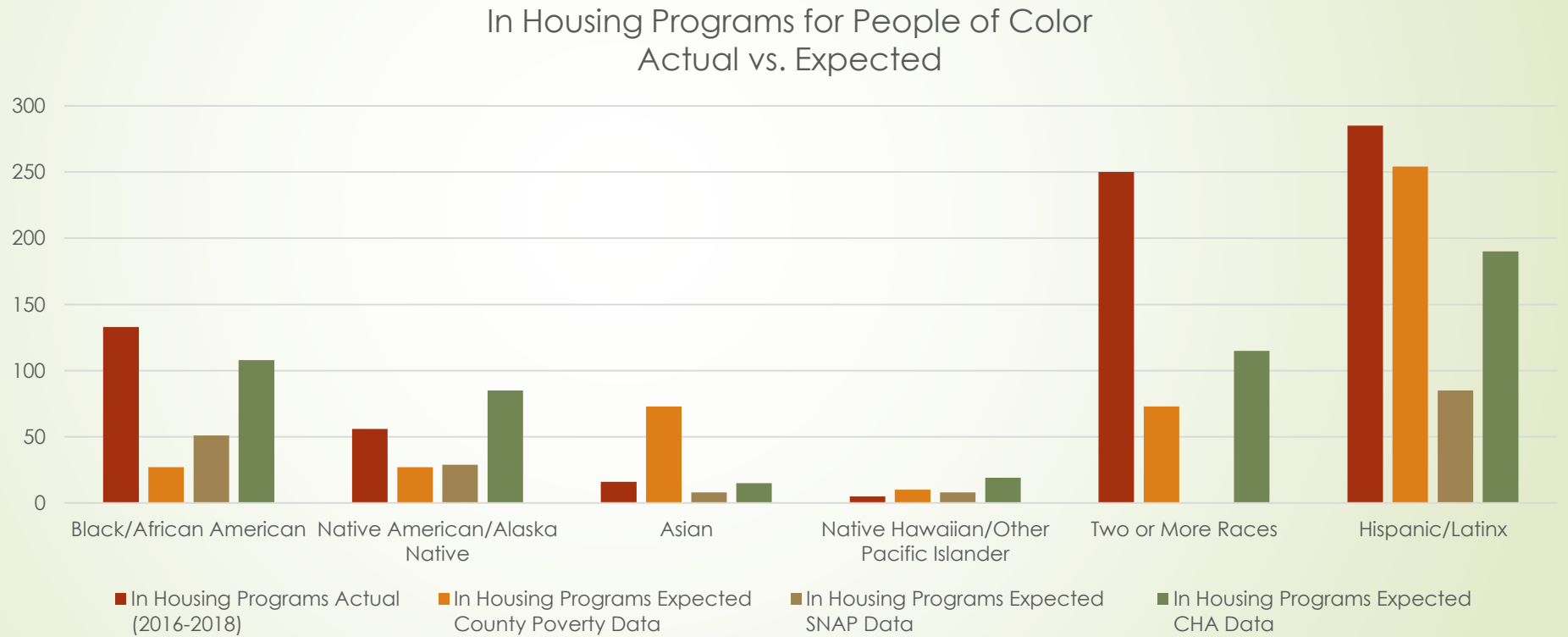
In Housing Programs Race & Ethnicity Chi Square Analyses

	In Housing Programs Actual (2016-2018)	In Housing Programs Expected Poverty Data	In Housing Programs Expected SNAP Data	In Housing Programs Expected CHA Data
White	1200	1484	1418	1287
Black/African American	133	27	51	108
American Indian/Alaska Native	56	27	29	85
Asian	16	73	8	15
Native Hawaiian/Pacific Islander	5	10	8	19
Multi-Racial	250	73	---	115
Hispanic/Latinx	285	254	85	190

In Housing Programs for White People: Actual vs. Expected



In Housing Programs for People of Color: Actual vs. Expected





In Programs

Race & Ethnicity Chi Square Analyses

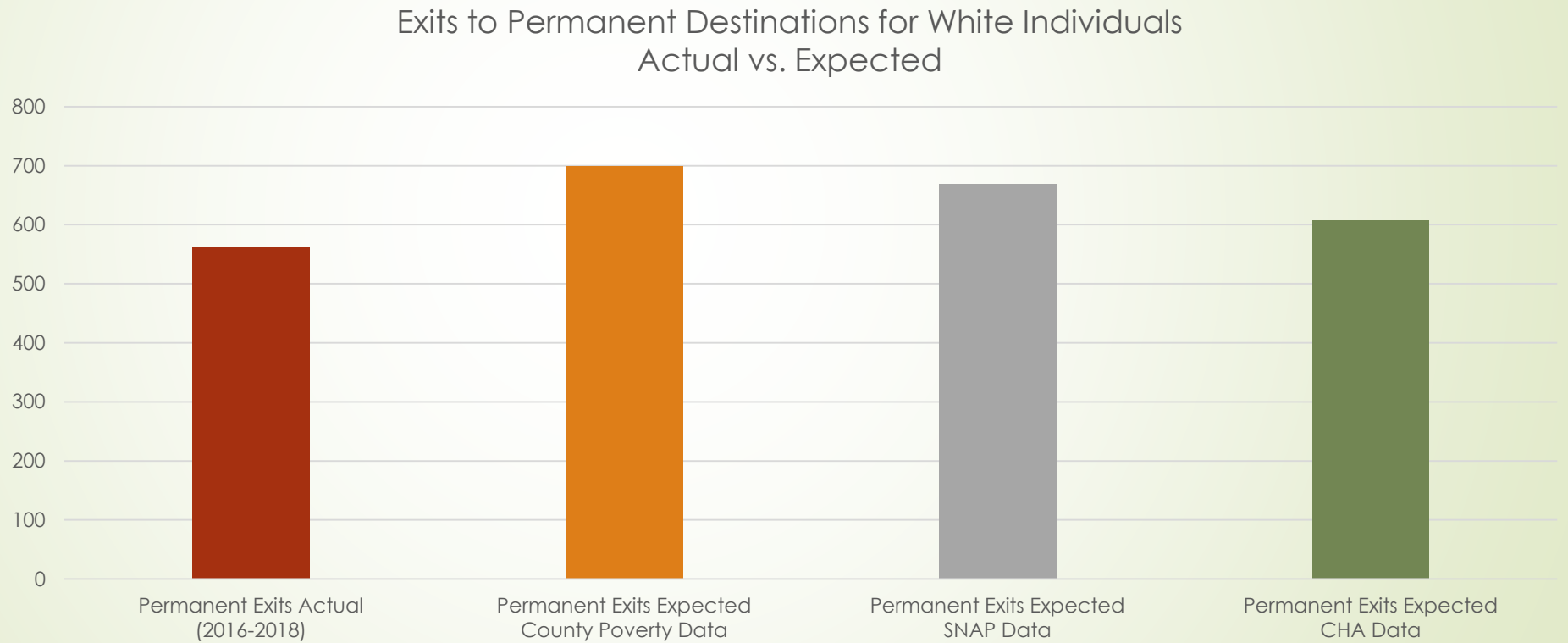
- ▶ Used County poverty data, SNAP homeless data, and CHA assessment data to generate expected race and ethnicity distributions
- ▶ Chi square analyses were run to compare the actual distribution of race and ethnicity of people in programs against each expected distribution
 - ▶ All analyses statistically significant (differences not due to chance)
- ▶ Greatest contributors to differences between actual and expected distributions include:
 - ▶ More than expected Black/African American people (Poverty & SNAP)
 - ▶ More than expected Multi-Racial people (Poverty & CHA)
 - ▶ More than expected Hispanic/Latinx people (SNAP & CHA)
 - ▶ Fewer than expected Asian people (Poverty)

Exits to Permanent Destinations

Race & Ethnicity Chi Square Analyses

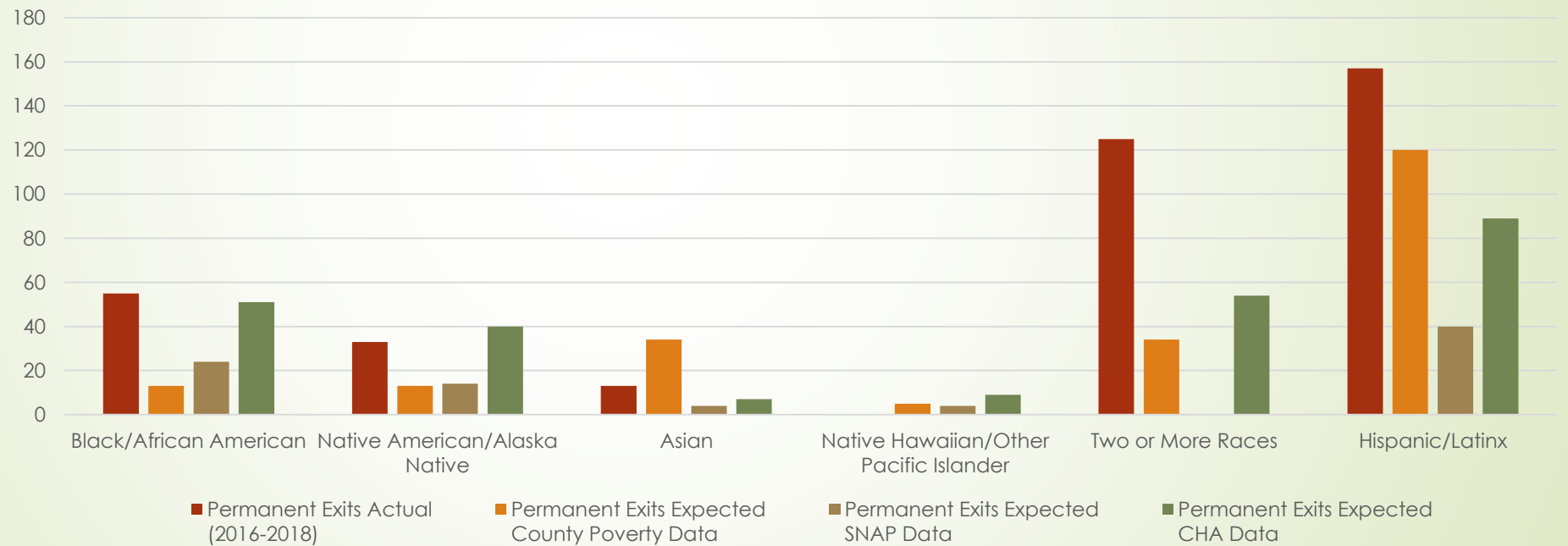
	Exits Permanent Actual (2016-2018)	Exits Permanent Expected Poverty Data	Exits Permanent Expected SNAP Data	Exits Permanent Expected CHA Data
White	561	700	669	607
Black/African American	55	13	24	51
American Indian/Alaska Native	33	13	14	40
Asian	13	34	4	7
Native Hawaiian/Pacific Islander	0	5	4	9
Multi-Racial	125	34	---	54
Hispanic/Latinx	157	120	40	89

Exits to Permanent Destinations for White Individuals: Actual vs. Expected



Exits to Permanent Destinations for People of Color: Actual vs. Expected

Exits to Permanent Destinations for People of Color
Actual vs. Expected





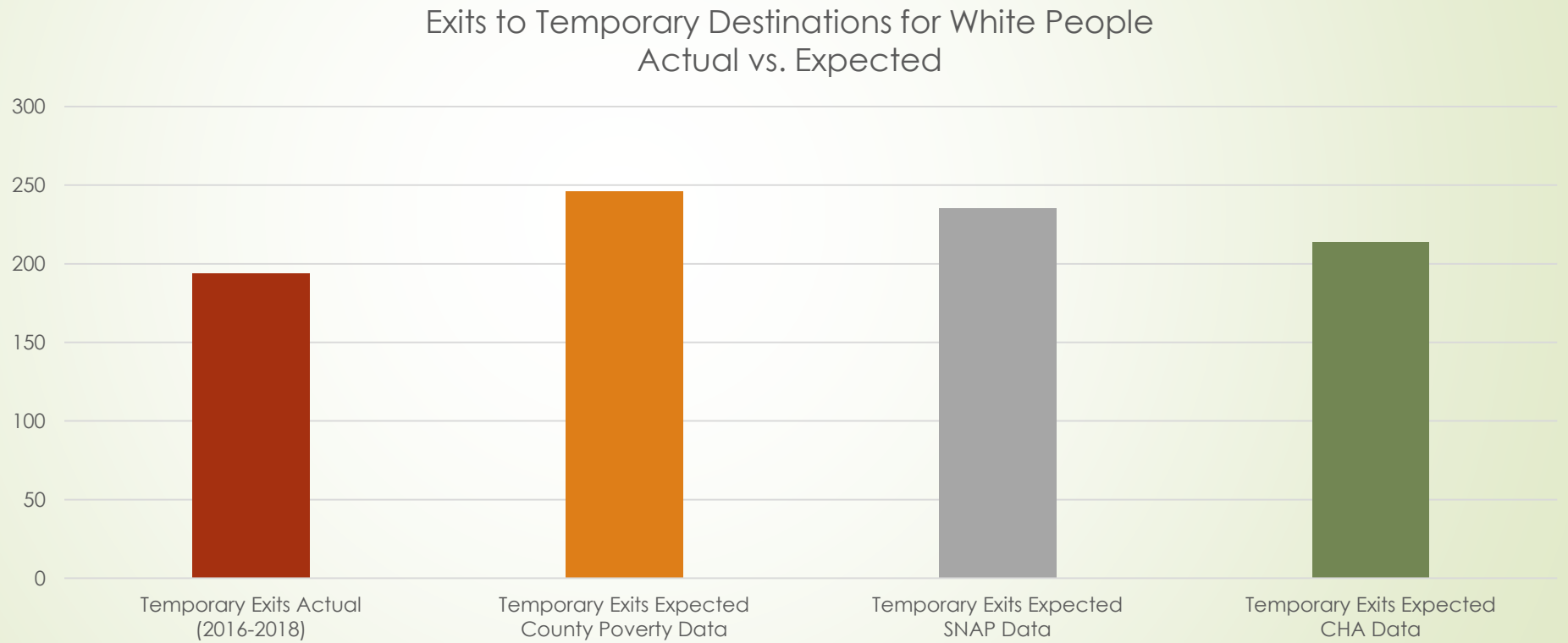
Exits to Permanent Destinations Race & Ethnicity Chi Square Analyses

- ▶ Used County poverty data, SNAP homeless data, and CHA assessment data to generate expected race and ethnicity distributions
- ▶ Chi square analyses were run to compare the actual distribution of race and ethnicity of people in programs against each expected distribution
 - ▶ All analyses statistically significant (differences not due to chance)
- ▶ Greatest contributors to differences between actual and expected distributions for people who exited housing programs to permanent destinations:
 - ▶ More than expected Black/African American and Native American/Alaska Native people (Poverty & SNAP)
 - ▶ More than expected Multi-Racial people (Poverty & CHA)
 - ▶ More than expected Hispanic/Latinx people (SNAP & CHA)
 - ▶ Fewer than expected White people (Poverty, SNAP, & CHA)

Exits to Temporary Destinations Race & Ethnicity Chi Square Analyses

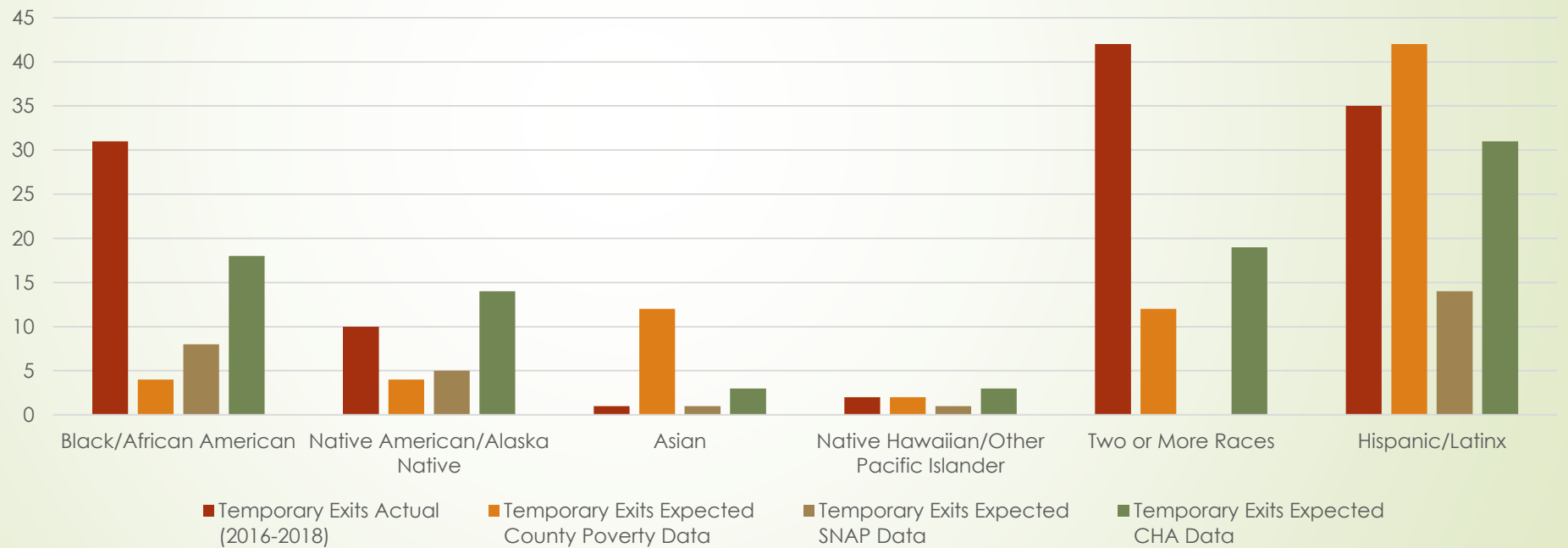
	Exits Temporary Actual (2016-2018)	Expected Exits Temporary Poverty Data	Expected Exits Temporary SNAP Data	Expected Exits Temporary CHA Data
White	194	246	235	214
Black/African American	31	4	8	18
Native American/ Alaska Native	10	4	5	14
Asian	1	12	1	3
Native Hawaiian/ Pacific Islander	2	2	1	3
Multi-Racial	42	12	---	19
Hispanic/Latinx	35	42	14	31

Exits to Temporary Destinations for White People: Actual vs. Expected



Exits to Temporary Destinations for People of Color: Actual vs. Expected

Exits to Temporary Destinations for People of Color
Actual vs. Expected





Exits to Temporary Destinations Race & Ethnicity Chi Square Analyses

- ▶ Used County poverty data, SNAP homeless data, and CHA assessment data to generate expected race and ethnicity distributions
- ▶ Chi square analyses were run to compare the actual distribution of race and ethnicity of people in programs against each expected distribution
 - ▶ All analyses statistically significant (differences not due to chance)except for ethnicity distribution (Hispanic/Latinx) comparison using CHA data
- ▶ Greatest contributors to differences between actual and expected distributions for people who exited housing programs to temporary destinations:
 - ▶ More than expected Black/African American people (Poverty & SNAP)
 - ▶ More than expected Multi-Racial people (Poverty & CHA)
 - ▶ More than expected Hispanic/Latinx people (SNAP)



Key Takeaways & Considerations

- ▶ For outside data sources, SNAP data tended to be a better fit for race distributions while County poverty data was a better fit for ethnicity
- ▶ CHA data fit the most closely for distributions of people in programs and for exit data
- ▶ Consistent findings across analyses:
 - ▶ Higher than expected percentage of people who identified as Black/African American people in all CHA-related categories when compared with SNAP and County poverty data.
 - ▶ Higher than expected percentage of people who selected multiple racial categories (Multi-Racial) in programs and who exited programs compared with County poverty and CHA data (SNAP data did not include a Multi-Racial category)
 - ▶ Higher than expected percentage of Hispanic/Latinx people in housing programs and who exited programs when compared with SNAP and CHA data
 - ▶ Lower than expected percentage of people who identified as White in all CHA-related categories compared with County poverty & SNAP data
 - ▶ Lower than expected percentage of people who identified as Asian in all CHA-related categories compared with County poverty data



Key Takeaways & Considerations

- ▶ Of concern is the higher than expected exits to temporary destinations for both Black/African American people and Native American/Alaska Native people.
- ▶ Findings related to the Multi-Racial race category should be considered with caution due to:
 - ▶ SNAP did not include a Multi-Racial category so no comparative analyses possible using SNAP data
 - ▶ CHA and programmatic Multi-Racial numbers were calculated based on people selecting 2 distinct racial identities – there was no single Multi-Racial option for people to select. This increases the likelihood of measurement error.



Likely and Possible Causes of Disparities

- ▶ Historical, Institutional and Systemic Racism
- ▶ Insufficient or ineffective outreach within Asian communities regarding that CHA and CoC services and language accessibility of these services
- ▶ Disparate impacts of screening criteria including credit and background checks on Black/African American and Native American/Alaska Native people
- ▶ Less access to assets from family and friends for people from most communities of color may explain higher numbers in CHA and programs compared to poverty and SNAP for most communities of color
- ▶ More access to assets from family and friends for white persons may explain lower numbers in CHA and programs compared to poverty and SNAP for white persons



Strategies to Advance Equity

- ▶ Additional focused outreach to the varied Asian communities is underway and should continue, to ensure that CHA is a known and trusted resource.
- ▶ Providers should continue to focus on hiring and retaining staff that reflect the diversity of the service population, including direct service staff and management/administrative staff.
- ▶ Providers should ensure that people of color, especially communities with a higher percent of exits to temporary destinations, receive the type, level and duration of permanent housing and support services that meets their needs.
- ▶ Providers and leadership should increase resources, and take advantage of existing resources, for equity related trainings especially but not exclusively trainings focused on homelessness and housing. CoC weekly digest will be used to publicize equity related trainings and events.
- ▶ Equity Analysis results will be reviewed with CoC providers, Hispanic Interagency Networking Group, two Equity Diversity and Inclusion groups, Homeless Veterans Coordination Team, Supportive Housing Team, CHA workgroup, the Health, Housing and Human Services Executive Team and the Community Action Board to gather additional insight and develop additional strategies to advance equity within CHA and CoC.



Credits

- ▶ Equity Analysis primary author is Erin Schwartz, Ph D, Senior Policy Performance and Research Analyst, Clackamas County Health, Housing and Human Services
- ▶ Consultation with:
 - ▶ Abby Ahern, CoC Coordinator
 - ▶ Erika Silver, CoC Co-Chair
 - ▶ Erin Skinner, HMIS Management Analyst

APPENDIX K

Supportive Housing Services Program Regional Long-term Rent Assistance Program Policies

Overview

On May 19, 2020, voters in the greater Portland region approved a measure to provide housing and wraparound services to prevent and address homelessness. The measure authorizes a new regional tax that will generate initial revenue beginning in July 2021 and will sunset in December 2030 unless it is renewed by voters. The revenue will fund a new Supportive Housing Services Program (SHS) that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness.

A key strategy for achieving the measure's goals is the development of a Regional Long-term Rent Assistance (RLRA) program. The program will provide flexible and continued rent subsidy that will significantly expand access to housing for households with extremely and very low incomes across the region. RLRA subsidies will be available for as long as the household needs and remains eligible for the subsidy, with no pre-determined end date (other than if the SHS measure is not renewed by voters).

Tenant-based RLRA subsidies will leverage existing private market and regulated housing, maximizing tenant choice, while project-based RLRA subsidies will increase the availability of units in new housing developments. RLRA program service partners will cover payments of move-in costs and provide supportive services as needed to ensure housing stability. A Regional Landlord Guarantee will cover potential damages to increase participation and mitigate risks for participating landlords.

At a glance, RLRA will operate similar to the federal Housing Choice Voucher program. Tenants will pay 28.5% of gross income as their monthly rent portion and the program will subsidize the remaining costs. Participating units will meet inspection requirements and rent reasonableness standards, with base rents that do not exceed 120% Fair Market Rent (FMR) as established by the U.S. Department of Housing and Urban Development (HUD).

RLRA policies and guidelines will be flexible and low barrier to meet local needs and fill gaps in existing programs. RLRA aims to streamline screening criteria, simplify application processes, and reduce eligibility barriers to increase housing access and support long-term housing stability for all participants.

RLRA implementation

The RLRA program will be implemented independently by each county while following consistent regional guidelines and policies. This regional framework will provide consistency for participating landlords and tenants, simplify application and certification processes, and enable tenants to move between counties as needed. Specific program and administrative practices may be tailored to reflect local variations and be responsive to the needs and capacities of each county.

The RLRA program will build on the existing long-term rent assistance infrastructure and expertise within Clackamas, Multnomah and Washington counties. Each county will have its own RLRA Administrator(s), defined as the housing authority or community-based organization(s) responsible for administering the rent assistance according to the regional guidelines and policies.

This document sets forth the regional framework developed by the three counties that will guide the RLRA program's launch in July 2021. The counties will continue to work together and with Metro to monitor the program's implementation and may adjust these policies over time to address emerging needs and lessons learned.

Supportive Housing Services Program alignment

The RLRA program will operate within the broader context of the regional Supportive Housing Services Program. The RLRA's rent subsidies will support and align with other SHS components including:

- **Outreach:** Street outreach and engagement, relationship building, peer support, service navigation and housing placement.
- **Housing navigation:** Support with housing search and placement, applications, fees, security deposits, appeals, reasonable accommodation requests, and enforcement of fair housing and landlord tenant laws.
- **Supportive services:** Case management, tailored wraparound services and flexible funds to support long-term housing stability, including connections to clinical services, health and wellness supports, employment and benefit supports, and legal assistance as needed.
- **System capacity:** Technical assistance and financial investments to strengthen each county's systems of care, expand culturally specific service provision, and ensure service providers have adequate resources and capacity to meet SHS service expectations and needs.

Guiding principles

The RLRA program is rooted in a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color (BIPOC) who are disproportionately impacted by housing instability and homelessness. This includes implementing strategies to mitigate barriers to program access, using equity criteria to inform program design, and collecting and evaluating disaggregated data to ensure the program achieves racially equitable outcomes.

Implementation of the RLRA program will be guided by the following principles:

- Lead with racial equity and work toward racial justice
- Provide housing stability for households who are experiencing or at risk of homelessness
- Ensure program accessibility by removing screening barriers and simplifying application processes
- Actively work to preserve participant access to the program and prevent eviction and program termination
- Strengthen partnerships with landlords and property managers through program transparency and streamlined eligibility processes
- Embrace regionalism through consistent regional guidelines and policies
- Support local flexibility to tailor program implementation to the needs and capacities of each county
- Align rent assistance with other SHS components including housing navigation and supportive services

Tenant-based RLRA Policies

Tenant Referral, Eligibility and Documentation

Referral process: The RLRA program will receive referrals through a flexible process with multiple referral paths, to be determined at the county level. The counties' coordinated access systems will be primary referring agencies. Other referring agencies may include community-based and culturally-specific partner organizations. Each referring agency will screen potential participants for RLRA voucher eligibility, according to the regional eligibility guidelines below. Counties will be held accountable for ensuring referral pathways are equitable, inclusive and effective at connecting eligible participants with appropriate housing options and supportive services.

Eligibility guidelines: Eligibility guidelines will be based on the priority populations for the Supportive Housing Services program. The majority of households served by the RLRA program will meet the criteria for priority population A¹, with incomes at or below 30% Area Median Income (AMI). Households that meet the criteria for

¹ Population A of the Supportive Housing Services program is defined as a household with extremely low income, one or more disabling conditions, and experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness. Population B is defined as a household experiencing homelessness or having a substantial risk of experiencing homelessness.

population B, with incomes at or below 50% AMI, will also be eligible. Each county will determine at what level to allocate funds to the RLRA program to serve people in population A and B and will be held accountable for adhering to the SHS program funding allocation requirement that 75% of overall program funds are devoted to services for population A and 25% for population B.

Tenant screening: Tenant screening will be the responsibility of the participating landlord or property manager. No tenant screening will be conducted by the RLRA program and there will be no criteria for mandatory denials. The only screening conducted by the RLRA program will be a verification system to ensure that applicants are not already receiving long-term rent assistance in another county or program.

Documentation guidelines: Documentation requirements for RLRA eligibility will be flexible to minimize barriers. Government issued identification is preferred, but this can include documentation from any government agency containing the applicant's name and date of birth. Citizenship status and criminal background will not be assessed. Program guidelines will specify that no social security numbers should be collected and will clarify alignment with HMIS standards.

Landlord Partnership

Landlord guarantee: A regional landlord guarantee will be established to provide assurances to participating landlords. All landlords leasing to RLRA voucher holders will have access to a risk mitigation fund to cover costs of unit repair, legal action, and limited uncollected rents that are the responsibility of the tenant and in excess of any deposit, up to a certain amount. Landlords leasing to RLRA households in supportive housing will have access to additional services to support tenant stability and housing retention. In exchange for these additional commitments, landlords will be required to reduce screening barriers, work collaboratively with service partners, and follow fair housing, equity and non-discrimination guidelines. (For more information on the landlord guarantee, see Appendix A.)

Lease term: Twelve-month leases are preferred, but shorter leases are allowed if they are consistent with funder guidelines and the landlord's practice with other housing. If the tenant is already in a housing unit prior to the RLRA contract and has a current lease, then a new lease is not required.

Housing placement timeline: A standard period of up to 120 days is allowed for voucher holders to secure an appropriate housing unit. Extensions to this timeline are available to accommodate voucher holders actively engaged in the housing placement process who need additional time. Extensions will generally be granted by the RLRA Administrator upon request, with some limitations.

Unit Eligibility

Unit location: Units must be located inside Metro's jurisdictional boundary.

Unit costs: Units must be "rent reasonable" as defined by HUD standards to prevent rent gouging. Rent shall not exceed 120% FMR across the region to contain program costs. A base rent worksheet will be used to assist applicants and landlords to easily understand the maximum contract rent allowed. When the RLRA program is applied to an existing unit (leasing in place) and the unit is larger than program requirements for the household composition, rent reasonableness for the allowed household size unit will be used to determine eligibility and calculate rent reasonableness.

Unit quality: Inspections to assess unit quality will use Housing Quality Standards and can be conducted within 60 days of tenancy. If a unit cannot pass inspection, the contract will be dissolved but rent will be covered up to that date. Inspections to assess unit eligibility will be required only for non-regulated units (i.e. units not already subject to habitability standards linked to another government funding source) that do not have other inspection standards and requirements.

Special housing types: Special housing types (e.g. SROs, congregate, shared housing) will be eligible, with the goal of providing flexibility. The RLRA program will clarify eligible special housing type standards and guidelines.

Rent Assistance

Rent calculation: The RLRA program will use one consistent rent calculation for all households with incomes at or below 30% AMI: 28.5% of gross income, with no deductions. Assets, financial aid and incidental income (recycling, plasma, etc.) will not be counted toward the tenant's income calculation. No rent minimums may be established. Flexible rent calculations that require households with incomes between 30% and 50% AMI to pay more than 28.5% of gross income may be considered.

Utility allowance: The RLRA program will cover the reasonable cost of utilities paid separately when calculating rent contributions. Program participants will be reimbursed for any amount that this utility cost exceeds their rent contribution. The utility reimbursement can be paid directly to the utility, property management company or the household at the program's discretion, with local flexibility based on funder requirements, etc.

Income reexaminations: Income reexaminations specific to the RLRA program will occur every three years if the head of household is 55 years or older or a person with a disability, and every two years for all other households. Interim reexaminations may be conducted prior to this two- or three-year schedule and may be requested by the household if the household's income decreases, increases from zero income, there is a change in household composition that changes the household income from previous examination, or if the contract rent changes.

Household Changes During Program

Households over income: The rent contract will be maintained for up to 180 days for participants who are determined to be over income (i.e. subsidy is no longer needed because 28.5% of income is higher than the rent, reducing rent assistance to \$0). Participants who lose stable income and need RLRA within two years of exiting the program will be eligible to re-start their rent assistance pending the availability of sufficient funding.

Household membership: Household members can be added to an RLRA contract at any time, as long as the household still meets income eligibility and unit capacity requirements and new household members are added to the lease.

Temporary vacancy: The rent contract will be maintained for up to 180 days if the tenant is temporarily out of the unit (e.g. confined to a nursing home, hospital, inpatient treatment or incarcerated). Accommodations beyond 180 days will be at the discretion of the program and may include options to be placed at the top of the list when the tenant returns or is released.

Unit transfers: Tenant-based unit transfers are allowed after 12 months of assistance (or sooner if the lease is for less than 12 months or the landlord is willing to terminate the lease early). Exceptions will be made for reasons of reasonable accommodation, reasons related to domestic violence or personal safety, reasons related to discrimination or harassment in housing, changes in household composition, or other reasons as approved by the RLRA Administrator. RLRA program payments will be made through the end of the last month of tenancy to allow for overlap with the new tenancy if needed. Transfer lease-up timelines are the same as for initial lease-up. Recertifications are only required with a unit transfer if the household composition changes. Tenants can move across county lines as long as voluntary services are available to meet household needs in the new location.

Termination of Rent Assistance

Termination of rent assistance: Rent assistance may be terminated to a program participant who violates program rules or conditions of occupancy. The program's intent is to avoid termination unless absolutely necessary. Program partners will work together to preserve participant access to the program by (a) providing all participants with written copies of program rules at move-in, (b) ensuring participants are connected with appropriate supportive services to support housing stability, (c) examining all extenuating circumstances in determining whether violations are serious enough to warrant termination so that a participant's assistance is terminated only in the most severe cases, and (d) offering counseling prior to proposing termination.

Reasons for termination: Grounds for proposing termination of rent assistance may include violation of rent assistance program rules related to: accurate reporting of income, not completing or returning required paperwork, abandoning unit, unauthorized guests, missed inspections or failed inspections due to a tenant-caused issue, nonpayment of the tenant's portion of utilities that results in a utility shut-off, violent or abusive behavior toward staff, or subletting of the assisted unit.

Appeals process: Participants will be provided with a formal appeals process that at a minimum must consist of (a) written notice to the participant containing a clear statement of the reasons for termination, (b) a review of the decision, in which the participant is given the opportunity to present written or oral objections before a person other than the person (or a subordinate of that person) who made or approved the termination decision, and (c) prompt written notice of the final decision to the participant.

Reinstatement: Termination does not bar the participant from receiving further assistance at a later date. Any participant can request a reasonable accommodation to be reinstated back into the program.

Project-based RLRA Policies

All relevant tenant-based RLRA policies described in the above section also apply to project-based RLRA, unless inconsistent with the policies outlined below. This section focuses on additional policies that are specific to project-based RLRA as well as policy areas (such as inspections) where the project-based policies differ from the tenant-based policies.

Rent

Rent reimbursement rates: Reimbursement rate caps will range from 60-80% AMI rents depending on the project and based on criteria established by each county. Reimbursement at <60% or >80% AMI rents may be available for a small number of projects that meet specific criteria, at the discretion of each county.

Rent adjustments: A fixed annual rent increase of 2-3% per year will be included in the project-based RLRA contract. Rents must remain within rent reasonableness guidelines. In cases where a project includes rent subsidies from multiple sources (e.g. project-based RLRA and HUD Project Based Vouchers), the RLRA Administrator can opt to align RLRA rent adjustments with the other subsidy source's regulated rent adjustments.

Vacancy payments in between tenants: Vacancy payments of up to two months may be included in the project-based RLRA contract but are not required. Whether to include vacancy payments in the contract and the length of the payments will be at the discretion of each county.

Contract

Length of contract term: The initial term may not be less than one year and may be up to 15 years. If the term extends beyond the SHS sunset date of December 2030, the contract must either make the term years following the SHS sunset date contingent on the availability of sufficient rental assistance funding or counties can opt to use capitalized reserves or other strategies on a case-by-case basis to cover costs beyond the sunset date if SHS is not renewed. The initial term can be extended by mutual agreement if adequate resources are available.

Removal of units from contract with extended vacancies between tenants: The project-based RLRA contract shall provide that if any contract units have been vacant between tenants for a period of 120 days or more, the RLRA Administrator may amend the contract to remove those units from the contract or move the project-based subsidy to different units in the same project (as feasible), at the discretion of the RLRA Administrator and with notice to the owner.

Contract termination: Owners may terminate the project-based RLRA contract before the contract term expires only under the following conditions and with RLRA Administrator approval: (a) substantial building rehab that will require tenants to be relocated, and (b) financial restructure. Owners must provide notice to the RLRA Administrator and tenants not less than one year prior to terminating the contract or not extending it when it

expires. Upon termination, current tenants of contract units may elect to use tenant-based subsidies to remain in the current unit or move with assistance (as feasible).

Inspections

Inspections are required only for non-regulated units that do not have other inspection requirements. Guidelines for inspections of non-regulated units are as follows:

- **Initial:** All non-regulated units need to pass inspection before entering a contract. For new development, the state's occupancy certificate may be used in lieu of initial inspection.
- **Turnover:** All non-regulated units must be inspected at turnover; if the unit has been inspected within the past 24 months, the RLRA Administrator may opt to have the landlord self-certify the unit condition in lieu of a physical inspection.
- **Reinspection:** At minimum, inspections must be conducted of a random sample of at least 20% of non-regulated contract units within each project every two years.

Inspections of any contract unit may be conducted any time deemed necessary (regardless of whether or not the unit is regulated).

Protections for Existing Tenants

Displacement: Project-based contracts for existing buildings will be placed on vacant units or units where the existing tenant qualifies for RLRA, to the extent feasible. Existing tenants in a unit to be placed under contract who meet all of the eligibility requirements for the project-based unit will be given priority access to the project-based unit. Existing tenants that are displaced by a new development with a project-based RLRA contract will be provided relocation assistance in accordance with applicable local and federal laws.

Household Changes During Program

Change in household composition: Household members can be added to project-based unit at any time, as long as the household still meets income eligibility and unit capacity requirements and new household members are added to the lease. If changes in household size or composition make the household's existing unit unsuitable, the RLRA Administrator will work with the household to support a transfer to a project-based unit of an appropriate size, to the extent feasible.

Appendix A

Regional Landlord Guarantee

Overview

The Regional Long-term Rent Assistance (RLRA) program will provide tenant-based and project-based rental subsidies that will significantly expand access to housing for households with very low incomes across the region. Participating RLRA landlords will benefit from predictable, on-time rent payments. The program will also provide a Regional Landlord Guarantee (RLG) to increase participation and mitigate risks for participating landlords. The RLG will clarify partners' roles in supporting tenant stability and provide assurances to landlords concerned about additional financial or property risks associated with renting to RLRA participants.

For all RLRA landlords, the RLG will provide access to a risk mitigation fund that will cover costs incurred by participating landlords related to unit repair, legal action, and limited uncollected rents that are the responsibility of the tenant and in excess of any deposit. Landlords leasing to RLRA households in supportive housing will have access to additional services to support tenant stability and housing retention. In exchange for these additional commitments associated with supportive housing, landlords will be required to reduce screening barriers, work collaboratively with service partners, and follow fair housing, equity and non-discrimination guidelines.

General Regional Landlord Guarantee Guidelines

Regional consistency

- The overall components and broad policy guidelines for the RLG will have regional consistency.
- The structure and financial commitments of risk mitigation funds will have regional consistency but don't necessarily need to be implemented regionally.
- Each county's budget allocations for risk mitigation funds will be developed based on regional standards.
- Landlord commitments in exchange for RLG eligibility will have regional consistency to focus on reducing barriers as much as possible, but with flexibility for specific guidelines to be tailored by jurisdiction.
- Implementation of the service components of the RLG will be managed through the counties' contracts and MOUs with service providers with flexibility to be tailored by population and project type, but with regional consistency around the overall components.
- Counties will work together over time to develop regionally consistent guidelines, service standards and document templates to support implementation.

Eligibility criteria

- All landlords with project-based RLRA contracts or leases with tenant-based RLRA participants will be eligible for risk mitigation funds.
- Landlords serving households who qualify for a higher level of services and that sign an RLRA Supportive Services Partnership Agreement with a contracted service provider will be eligible for the full guarantee.
- The definition of which households qualify for a higher level of services will be determined by each county as part of the SHS implementation process. At a minimum, it will include households in supportive housing.

Service partners

Each County² will enter into formal agreements with service partners to (a) refer eligible households to receive RLRA subsidies and (b) provide housing retention supports to households receiving RLRA subsidies. The services attached to the RLRA Supportive Services Partnership Agreement will typically be provided by agencies under contract with the County to receive SHS funding to support their work. In situations where this isn't the case, there will be an MOU or other formal agreement with the service provider to formalize expectations.

² In cases where the RLRA is not administered directly by the County, the agreement will also include the RLRA Administrator.

Tenant-based RLRA Regional Landlord Guarantee

Risk mitigation fund

All landlords leasing to tenant-based RLRA voucher holders will have access to a risk mitigation fund modeled on the Oregon Housing Choice Landlord Guarantee³ and administered by each County or a third-party regional entity.

- Landlords will be able to access the fund for the life of the tenancy as long as the RLRA voucher is in use.
- Eligible costs will be based on the Oregon Housing Choice Landlord Guarantee's guidelines, including:
 - Physical damage to the unit beyond normal wear and tear that exceeds the security deposit
 - Legal costs related to serious violations of lease or state law⁴
 - Loss of rental income during the time required for repairs
 - Unpaid rent and utilities for which the tenant was responsible
 - Late fees or lease-break fees
 - Other costs related to lease violations (disposal fees, muck-outs, etc.)
- Coverage limits will be based on the Oregon Housing Choice Landlord Guarantee's guidelines (up to \$5,000 per household for the life of the tenancy with a minimum claim of \$500).

Landlord commitments under RLRA Supportive Services Partnership Agreement

Eligible landlords who sign an RLRA Supportive Services Partnership Agreement with a contracted service provider will be eligible for the risk mitigation fund as well as the service commitments listed below. In exchange for these benefits, the partnership agreement will specify commitments the landlord must make, including (but not limited to):

- Reduce screening barriers and/or accept applicants who have been pre-approved
- Limit application fees and security deposits to a reasonable limit
- Notify service partners when issues arise and work collaboratively to prevent damages or eviction
- Follow fair housing, equity, non-discrimination and anti-racism guidelines

Service provider commitments under RLRA Supportive Services Partnership Agreement

The specific service provider commitments included in the RLRA Supportive Services Partnership Agreement will be defined by each provider's contract or MOU with the County. At a minimum, these services will include:

- Assist tenants with the application process and payment of non-rent move-in costs
- Provide housing retention support and connections to supportive services
- Maintain regular contact with landlords and tenants and work collaboratively to ensure successful tenancies
- Be available and responsive for direct and emergency communication

Additional benefits available to landlords who sign RLRA Supportive Services Partnership Agreement

- Incentive payment of \$500 for each unit rented to a tenant-based RLRA household
- Reimbursement of up to \$1,000 for repairs in excess of \$500 required to pass move-in inspection

Landlord liaison function

A landlord liaison function will be included in each county's implementation of the tenant-based RLRA program. Each county will determine how to implement this function and how to integrate it into the landlord guarantee.

The landlord liaison function includes:

- Recruiting, engaging and building relationships with landlords
- Providing information about RLRA guidelines and supporting landlords with paperwork
- Tracking vacancies and supporting the process of connecting RLRA tenants with available units

³ Oregon's program requires a court judgment before filing a claim; this requirement would not be included.

⁴ Oregon's program is limited to non-eviction related costs; this language is based on JOIN's LRRP.

- Providing neutral third-party mediation between landlords and service providers as needed

Project-based RLRA Regional Landlord Guarantee

Risk mitigation fund

All landlords with a project-based RLRA contract will have access to a risk mitigation fund modeled on the City of Portland's Risk Mitigation Pool (RMP) and administered by each County or a third-party regional entity.

- Landlords will be able to access the fund for the duration of the project-based contract.
- Eligible costs will be based on the RMP's guidelines, including:
 - Physical damage to unit or common areas beyond normal wear and tear that exceeds security deposit
 - Administrative fees (up to 5% of qualifying repairs) for supervision of repairs
 - Legal costs related to serious violations of lease or state law⁵
 - Unpaid rent (and utilities under certain circumstances), not to exceed 90 days
 - Rent during vacant turnover time, when that period exceeds 60 days
 - Holding units for qualified tenants beyond 60 days
- Coverage limits will be based on the RMP's guidelines (\$7,500-\$14,500 per unit for the life of the contract⁶).

Landlord commitments under RLRA Supportive Services Partnership Agreement

Same as for tenant-based RLG. In addition, landlords will be required to accept referrals from RLRA referral partners and the coordinated access system, notify partners when units are available, and hold vacant units open for qualified tenants for a specified period.

Service provider commitments under RLRA Supportive Services Partnership Agreement

Same as for tenant-based RLG.

⁵ The RMP only covers eviction-related legal costs; this language is based on JOIN's LRRP.

⁶ Maximum cumulative limit that a property can claim for the life of the program is based on a per-unit limit of \$7,500 for SROs, \$9,000 for studios, \$10,000 for one bedrooms, and \$14,500 for two+ bedrooms. These amounts also represent the maximum amount of a single claim. Claims >\$3,000 are reduced by the amount that could be recovered from insurance.



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Supportive Housing Services Program Work Plan

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Auditor

Brian Evans

600 NE Grand Ave.
Portland, OR 97232-2736
503-797-1700

2020 SUPPORTIVE HOUSING SERVICES PROGRAM WORK PLAN

Adopted by Resolution No. 20-5148 on December 17, 2020 by the Metro Council.

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1. INTRODUCTION

On May 19, 2020, voters in the greater Portland region approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of experiencing homelessness. Community members and leaders from around the region developed the measure to provide the much-needed housing and wraparound services to effectively and permanently elevate people out of homelessness.

The ballot measure (see Addendum A) will fund a new Supportive Housing Services Program that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness. The program is guided by a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color (BIPOC) who are disproportionately impacted by housing instability and homelessness.

The Supportive Housing Services Program will directly fund Clackamas, Multnomah and Washington counties to invest in local strategies to meet the needs in their communities. Revenue will be distributed within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in those counties.

The program is funded through a 1 percent tax on all taxable income of more than \$125,000 for individuals and \$200,000 for joint filers and a 1 percent tax on profits from businesses with gross receipts of more than \$5 million. The new tax requirements begin in January 2021. Initial revenues are expected to be available for the first phase of program implementation by July 2021. The program will be funded through December 2030, unless reauthorized by the voters on or before that date.

In February 2020, the Metro Council adopted Ordinance No. 20-1442 which provided guidelines for Supportive Housing Services Program implementation including eligible services, priority populations, governance, local implementation plans, allocation of revenue, equity and community engagement, and tri-county planning. In June to September 2020, Metro convened a stakeholder advisory table that developed recommendations for regional values to guide program implementation and outcome metrics to ensure transparent oversight and accountability.

This Supportive Housing Services Work Plan provides a comprehensive plan for implementing the program. The Work Plan incorporates and supplements the guidelines in Ordinance No. 20-1442 and the recommendations of the stakeholder advisory table. In addition to Metro Chapter 11.01, it serves as the governing document for program implementation, addressing how Supportive Housing Services revenues will be administered to achieve the goals described in the ballot measure.

2. GUIDING PRINCIPLES AND RACIAL EQUITY

Supportive Housing Services Program implementation will be guided by the following principles, which were developed by the stakeholder advisory table:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;

- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are, and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

Metro has adopted a Strategic Plan to Advance Racial Equity, Diversity and Inclusion which includes specific goals and objectives to ensure that all people who live, work and recreate in the greater Portland region have the opportunity to share in and help define a thriving, livable and prosperous region. A key objective for Supportive Housing Services Program implementation is a commitment to advance equity related to stable and affordable housing. In implementing the program, Metro will rely on the goals and objectives within the Strategic Plan to:

- Convene regional partners to advance racial equity outcomes in supportive housing services;
- Meaningfully engage with Black, Indigenous and people of color, people with low incomes, and other historically marginalized communities in establishing outcomes and implementing the program;
- Produce and provide research and information to support regional jurisdictions in advancing equity efforts;
- Increase accountability by ensuring involvement of Black, Indigenous and people of color in establishing goals, outcomes, and implementation and evaluation efforts;
- Increase participation of Black, Indigenous and people of color in decision-making; and
- Use equity criteria in resource allocation for the program.

Metro will actively work to remove barriers for organizations and communities to ensure full participation by providing stipends, scheduling events at accessible times and locations, and other inclusive engagement tactics.

3. GOVERNANCE

On February 25, 2020, the Metro Council adopted Ordinance No. 20-1442 referring to voters the ballot measure authorizing Metro to impose a tax to fund supportive housing services. The Supportive Housing Services Program and this Work Plan must comply with the promises made to the voters in the ballot measure.

3.1 METRO COUNCIL

The Metro Council provides policy direction for the Supportive Housing Services Program through:

- A. Adoption of this Work Plan;
- B. Appointment of Regional Oversight Committee members, chair and/or co-chairs, collectively charged with monitoring program implementation;
- C. Approval of Local Implementation Plans;
- D. Approval of intergovernmental agreements for implementation (each, an “Implementation IGA”) with Local Implementation Partners; and
- E. Monitoring of program outcomes, with guidance from the Regional Oversight Committee and tri-county advisory body.

3.2 METRO CHIEF OPERATING OFFICER AND STAFF

The Metro Chief Operating Officer (COO) is authorized by the Metro Council to implement this Work Plan, and the COO will direct staff to conduct all Supportive Housing Services Program administration activities referenced herein, including (without limitation) the following:

- A. Ensure program implementation upholds promises made to voters;
- B. Develop and execute Implementation IGAs with Local Implementation Partners;
- C. Implement efficient and effective collection of personal and business income taxes;
- D. Develop and coordinate systems and structures to provide robust oversight and accountability and ensure transparency of public funds;
- E. Convene meetings and provide administrative support for the Regional Oversight Committee;
- F. Provide staffing and logistical support for a tri-county advisory body to identify regional goals, strategies and outcome metrics related to addressing homelessness in the region; and
- G. Conduct an annual independent financial audit with results made publicly available.

3.3 LOCAL IMPLEMENTATION PARTNERS

Metro will partner with Clackamas, Multnomah and Washington county governments and their housing authorities to lead Supportive Housing Services Program implementation. The three county governments will serve as Metro’s Local Implementation Partners for the program. As experts in implementing programs that serve community members experiencing homelessness, the Local Implementation Partners will work with service providers and community partners to develop and implement programs that respond to the unique needs in their communities.

Local Implementation Partners must:

- A. Adopt a Local Implementation Plan, informed by community engagement, that describes local housing and homeless service needs, current programming and unmet programming capacities, proposed use of funds, and a strategy for advancing racial equity and ensuring community engagement in implementation (see Section 5.1 and Addendum D);

- B. Enter into an Implementation IGA with Metro, obligating the Local Implementation Partner to comply with this Work Plan and enter into certain covenants required to ensure compliance with the ballot measure and other applicable law; and
- C. Track and report on program outcomes annually as defined through this Work Plan.

3.4 REGIONAL OVERSIGHT COMMITTEE

In accordance with Metro Code Section 2.19.270, Metro will appoint a Regional Oversight Committee to provide policy and programmatic guidance, monitor programmatic expenditures and evaluate outcomes (see Addendum 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;
- B. Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals;
- C. Monitor financial aspects of program administration, including review of program expenditures; and
- D. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.

Membership

The committee will be composed of 15 voting members with 5 members each from Clackamas, Washington and Multnomah counties. Committee members will be appointed by the Metro Council.

The committee's membership will include a broad range of personal and professional experience, including people with lived experience of homelessness or housing instability. The committee will also reflect the diversity of the region. The membership will include people with the following experiences, perspectives and qualities:

- Experience overseeing, providing or delivering supportive housing services;
- Lived experience of homelessness or severe housing instability;
- Experience in the development and implementation of supportive housing and other services;
- Experience in the delivery of culturally specific services;
- Experience in the private for-profit sector;
- Experience in the philanthropic sector;
- Experience in a Continuum of Care organization; and
- People who identify as Black, Indigenous and people of color, people with low incomes, immigrants and refugees, the LGBTQ+ community, people with disabilities and other underserved and/or marginalized communities.

Stipends, childcare, technical assistance, interpretation, accessibility assistance and other supports for participation will be available.

Committee members will serve two-year terms.

Jurisdictional representation

One representative each from the Clackamas, Multnomah and Washington County Boards of Commissioners, Portland City Council and Metro Council will serve on the committee as non-voting delegates.

Accountability

All committee meetings and materials will be available and accessible to the public, and appropriate notice will be given to inform all interested parties of the time, place and agenda of each meeting.

Committee members are considered public officials under Oregon law and will be responsible for complying with provisions in Oregon law regarding public records and public meetings, disclosure of conflicts of interest, prohibitions on the use of official positions to obtain financial benefit, and restrictions on political activity.

Metro may conduct a review of the committee's role and effectiveness as appropriate.

4. FUNDING DISTRIBUTION AND ELIGIBLE USES

4.1. ALLOCATION AND DISTRIBUTION OF SUPPORTIVE HOUSING SERVICES REVENUE

Supportive Housing Services revenue will be distributed as follows:

- A. After Metro has first retained funds necessary to pay for collection of the taxes, including debt service related to the implementation costs, Metro may retain up to 5 percent of the remaining collected revenue for administration, oversight and accountability, data collection, coordination, and other costs associated with management of the regional program.
- B. After the funds have been allocated as set forth in Section 4.1.A, Metro will then allocate the remaining Supportive Housing Services revenue within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in those counties. Funds will be distributed to the Local Implementation Partner within each county using the following percentages: 21 1/3 percent to Clackamas County, 45 1/3 percent to Multnomah County and 33 1/3 percent to Washington County.
- C. The percentages set forth in Section 4.1.B apply to revenue for the first two tax years. Thereafter, the percentages may be adjusted to reflect the portion of Supportive Housing Services revenue actually collected in each county.
- D. Metro's Implementation IGAs with each Local Implementation Partner will specify how Supportive Housing Services funds will be released. Agreements will include specifications for annual program budgets, financial reporting, practices for reserving funds, and redistribution of funds if a jurisdiction fails to comply with the agreement.

4.2 PRIORITIZATION OF SUPPORTIVE HOUSING SERVICES FUNDS

Each Local Implementation Partner must create a Local Implementation Plan outlining its proposed use of funds in accordance with the purposes of the program (see Section 5.1 and Addendum D). Local Implementation Plans must include a commitment that funding will be allocated as follows (see Addendum C for definitions of the terms used in Sections 4.2 and 4.3):

- A. Seventy-five percent of funds will be devoted to services for population A, defined as:

- Extremely low-income; AND
- Have one or more disabling conditions; AND
- Are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness.

B. Twenty-five percent of funds will be devoted to services for population B, defined as:

- Experiencing homelessness; OR
- Have a substantial risk of experiencing homelessness.

This distribution of resources to serve priority populations may be adjusted over time as chronic and prolonged homelessness is reduced.

4.3 ELIGIBLE USES OF SUPPORTIVE HOUSING SERVICES FUNDS

The Supportive Housing Services Program is guided by regional goals and oversight, but implemented by Local Implementation Partners who are best positioned to respond to community needs. Successful implementation requires flexibility for local jurisdictions to create and implement strategies that respond to local community needs and effectively leverage local capacity and expertise. The uses of Supportive Housing Services funds will be guided by each county’s Local Implementation Plan.

Eligible uses of funds include any of the supportive housing services defined in Addendum C as well as administrative costs within applicable limits (see Section 4.5).

Funds are prioritized for ongoing service and operating costs to support implementation of supportive housing services as defined in Section 4.5. Under certain circumstances, capital costs directly related to those supportive housing services may be eligible if necessary to support ongoing implementation of the services and when consistent with Local Implementation Plans.

Programmatic success will be based on housing stability achieved by people experiencing homelessness or at risk of homelessness. An approach that effectively balances supportive services with long-term rent assistance and other housing strategies will therefore be necessary.

Funds may only be used for services provided within the portion of each recipient county that is within the Metro jurisdictional boundary.

4.4 REGIONAL APPROACH TO MEETING SUPPORTIVE HOUSING NEED

A regional approach is required to effectively address service and resource gaps to meet the needs of the Supportive Housing Services Program’s priority populations across the region. Local Implementation Partners will work together to enhance and expand local programs and services so that they share responsibility to address unmet needs across the region. Each county will develop and enhance local supportive housing services to address the needs of the portion of the region’s homeless population that is proportionate to the percentage of Supportive Housing Services revenues allocated to each county (see Section 4.1).

4.5 ADMINISTRATIVE COSTS

It is the policy of the Metro Council to maintain low administrative costs to ensure that the maximum amount possible of Supportive Housing Services revenue is used to fund supportive housing services.

Administrative costs will be restricted as follows:

- A. As described in Section 4.1.A, after Metro's tax collection costs are paid, Metro may retain up to 5 percent of the remaining funds to pay for the costs to disburse the funds and administer and oversee the program. This includes convening and supporting the Regional Oversight Committee, establishing a regional data collection and reporting program, and supporting tri-county regional collaboration.
- B. Administrative expenses incurred by Local Implementation Partners for provision of services are recommended not to exceed five percent of total annual funds allocated for provision of services, consistent with guidelines for similar programs funded by the State.
- C. Administrative expenses incurred by Local Implementation Partners and housing authorities for administering long-term rent assistance programs are recommended not to exceed 10 percent of total annual funds allocated for long-term rent assistance, consistent with guidelines for similar programs funded by HUD and the State.
- D. Administrative expenses incurred by service providers are expected to vary based on program type, organizational capacity and other factors. The Regional Oversight Committee will include an analysis of service provider administrative costs in its annual monitoring of program expenditures. Based on this review, the committee may recommend adoption of service provider administrative cost guidelines for Metro Council consideration.

Administrative costs do not include costs directly associated with program and service delivery.

At least annually, the Regional Oversight Committee will consider whether the recommended administrative costs should be reduced or increased.

5. ACCOUNTABILITY STRUCTURES AND PROCESS

5.1 LOCAL IMPLEMENTATION PLANS

Each county will prepare a Local Implementation Plan to describe their local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program. Plans must be created using a racial equity lens that ensures equitable participation, access and outcomes in all parts of the program and considers the best available quantitative and qualitative data.

Development and approval process

Each Local Implementation Plan must be developed using locally convened and comprehensive engagement processes that prioritize the voices of Black, Indigenous and people of color and people with lived experience. Plans must be developed in full partnership with advisory bodies that equitably reflect community expertise and experience. Each county may convene a new advisory body or use an existing body that fulfills the representation requirements.

Advisory body membership must include:

- People with lived experience of homelessness and/or extreme poverty;
- People from Black, Indigenous and people of color and other marginalized communities;
- Culturally responsive and culturally specific service providers;

- Elected officials, or their representatives, from the county and cities participating in the regional affordable housing bond;
- Representatives from the business, faith and philanthropic sectors;
- Representatives of the county/city agencies responsible for implementing housing and homelessness services, and that routinely engage with unsheltered people;
- Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use from culturally responsive and culturally specific service providers; and
- Representation ensuring geographic diversity.

Each Local Implementation Plan will be reviewed and approved by the respective county's local governing body, the Regional Oversight Committee and the Metro Council. Upon full approval, each Local Implementation Plan will be incorporated into the Intergovernmental Agreements between Metro and each respective county to govern transfer of funds, program implementation, and ongoing oversight and accountability.

Required elements

Local Implementation Plans must include the following elements, described in greater detail in Addendum D:

- A. *Analysis of inequitable outcomes*: An articulation of racial inequities in housing stability and access to current services;
- B. *Racial equity strategies*: A description of mitigation strategies and how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion have been incorporated;
- C. *Inclusive community engagement*: An articulation of how perspectives of Black, Indigenous and people of color and culturally specific groups were considered and incorporated into the development of the plan and will continue to be engaged through implementation and evaluation;
- D. *Priority population investment distribution*: A commitment that funding will be allocated as specified in Section 4.2;
- E. *Current investments*: A review of current system investments or capacity serving priority populations, an analysis of the nature and extent of gaps in services to meet the needs of the priority population, and a commitment to prohibit displacement of current local funding commitments for such services;
- F. *Distribution*: A strategy for equitable geographic distribution of services with partnering jurisdictions and service providers across the region;
- G. *Access coordination*: A plan for coordinating access to services with partnering jurisdictions and service providers across the region;
- H. *Procurement and partners*: A description of how funds will be allocated to public and nonprofit service providers;
- I. *Planned investments*: An articulation of programmatic investments planned, including the types of services to be funded to address the gap analysis;
- J. *Outcomes, reporting and evaluation*: An agreement to track and report on program outcomes annually as defined through regional coordination and with regional metrics.

Updates and amendments

Local Implementation Plans may be revised or amended only upon written agreement by the Local Implementation Partner, recommendation for approval by the Regional Oversight Committee and approval by Metro Council. Proposed changes to a Local Implementation Plan will be presented as amendments to the Regional Oversight Committee for approval and confirmed by Metro Council.

5.2 REGIONAL OUTCOME METRICS

Regional outcome metrics will be used to understand the impacts and outcomes of the Supportive Housing Services Program. The required metrics will provide clear and consistent data sets that ensure transparent accountability and regional analysis of outcomes. They will be measured consistently in each county and reported to Metro and the Regional Oversight Committee. Staff will work to create standardized definitions and methodologies to achieve the intentions of the metrics as described below.

Additional collaboration between Metro, Local Implementation Partners and community experts will further refine and ensure quality control for each metric. Metrics will be phased in over time according to the regional system's capacity to comply with the newly established regional standards.

Required regional outcome metrics will include:

A. Housing stability

Measurable goals:

- Housing equity is advanced by providing access to services and housing for Black, Indigenous and people of color at greater rates than Black, Indigenous and people of color experiencing homelessness.
- Housing equity is advanced with housing stability outcomes (retention rates) for Black, Indigenous and people of color that are equal or better than housing stability outcomes for non-Hispanic whites.
- The disparate rate of Black, Indigenous and people of color experiencing chronic homelessness is significantly reduced.

Outcome metrics:

- Number of supportive housing units created and total capacity, compared to households in need of supportive housing. This will measure change in supportive housing system capacity and need over time.
- Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year. This will measure programmatic inflow and outflow.
- Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing) and priority population type. This will measure people being served.
- Housing retention rates. This will measure if housing stability is achieved with supportive housing.
- 'Length of homelessness' and 'returns to homelessness'. These will measure how effectively the system is meeting the need over time.

- Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice. This will measure leveraged impact of funding in each county.

B. Equitable service delivery

Measurable goals:

- Increase culturally specific organization capacity with increased investments and expanded organizational reach for culturally specific organizations and programs.
- All supportive housing services providers work to build anti-racist, gender-affirming systems with regionally established, culturally responsive policies, standards and technical assistance.

Outcome metrics:

- Scale of investments made through culturally specific service providers to measure increased capacity over time.
- Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages.
- Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience.

C. Engagement and decision-making

Measurable goals:

- Black, Indigenous and people of color are overrepresented on all decision-making and advisory bodies.
- Black, Indigenous and people of color and people with lived experience are engaged disproportionately to inform program design and decision making.

Outcome metrics:

- Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness.

Data disaggregation

In keeping with Metro’s commitment to advance racial equity, and the Supportive Housing Services Program’s overarching goal to ensure racial justice, data will be disaggregated to evaluate existing and continued disparate impacts for BIPOC communities and other impacted populations. As such, all applicable data sets will be disaggregated by regionally standardized values and methodology to understand disparate outcomes for people by race, ethnicity, disability status, sexual orientation and gender identity.

5.3 ANNUAL REVIEW PROCESS

Each Local Implementation Partner will submit an Annual Progress Report to the Metro Council and the Regional Oversight Committee summarizing its progress and outcomes under the Local Implementation Plan, including:

- A. A full program accounting of investments or a financial report;
- B. Reporting on required outcome metrics; and

- C. An equity analysis incorporated into all facets of the report, including reporting on the success or failure of racial inequity mitigation strategies and steps being taken to improve racial equity outcomes.

A template for the Annual Progress Report will be developed by Metro with input from the Local Implementation Partners.

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. The Local Implementation Partner will identify proposed strategies to address the Regional Oversight Committee's recommendations. The proposed strategies will be submitted to the Regional Oversight Committee for approval and confirmed by Metro Council.

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.

5.4 AUDITS

A public accounting firm must conduct an annual financial audit of the revenue generated by the Supportive Housing Services taxes and the distribution of that revenue. Metro will make public the audit and any report to the Metro Council regarding the results of the audit. Metro may use the revenue generated by the taxes to pay for the costs of the audit.

The revenue and expenditures from the taxes are also subject to performance audits conducted by the Office of the Metro Auditor.

6. REGIONAL COORDINATION

6.1 TRI-COUNTY ADVISORY BODY

Metro will convene a tri-county advisory body to strengthen regional coordination in addressing homelessness in the region. The advisory body will identify regional goals, strategies and outcome metrics and provide guidance and recommendations to inform Supportive Housing Services Program implementation.

The advisory body will include people representing the following perspectives:

- People with lived experience of homelessness and/or extreme poverty;
- People from Black, Indigenous and people of color and other marginalized communities;
- Culturally responsive and culturally specific service providers;
- Elected officials, or their representatives, from the counties and cities participating in the regional affordable housing bond;
- Representatives from the business, faith and philanthropic sectors;
- Representatives of county/city agencies responsible for implementing housing and homelessness services, and that routinely engage with unsheltered people;

- Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use from culturally responsive and culturally specific service providers; and
- Representation ensuring geographic diversity.

Metro will work with the Local Implementation Partners to develop a proposed structure, charter and procedures for the tri-county advisory body, to be presented to Metro Council for approval.

Metro will provide ongoing staffing and logistical support to convene the advisory body and support its planning and coordination efforts. Local Implementation Partners will work to incorporate the advisory body's recommendations into their implementation strategies.

6.2 TRI-COUNTY PLANNING

The tri-county advisory body will lead a planning process to develop recommendations for regional coordination related to these and other issue areas as identified:

- *Regional capacity*: strategies to strengthen regional supportive housing capacity, including but not limited to: coordination of capital investments funded by the regional affordable housing bond and other sources, development of a regional model of long-term rent assistance, and expanded system capacity for culturally specific housing and services;
- *Systems alignment*: coordination and integration between the housing and homeless service systems, as well as other systems serving people experiencing homelessness, including the healthcare, education, workforce and criminal justice systems; and
- *Standards and metrics*: regional performance metrics to measure the impact of specific program types, regional system indicators to measure changes in the population experiencing homelessness, consistency in program evaluation standards and procedures, standards for culturally responsive services, and standardized data definitions, data collection methods and quality control.

ADDENDUM A

BALLOT MEASURE 26-210

Ballot Title:	Supports homeless services through higher earners’ tax, business profits tax.
Question:	Should Metro support homeless services, tax income over \$200,000/\$125,000(joint/single), profits on businesses with income over \$5 million?
Summary:	<p>Measure funds supportive housing services to prevent and reduce homelessness in Washington, Clackamas, and Multnomah counties within district boundaries. Prioritizes services to address needs of people experiencing, or at risk of, long-term or frequent episodes of homelessness. Services funded by a marginal income tax of 1% on households with income over \$200,000 (over \$125,000 for single filers) and a business profits tax of 1%. Income tax applies to resident income, and to non-resident income earned from sources within district. Exempts businesses with gross receipts of \$5 million per year or less.</p> <p>Declares funding for homelessness services a matter of metropolitan concern, directs regional funding to local services agencies, requires community engagement to develop localized implementation plans. Allocates funds to counties by estimated revenue collected within each county. Establishes community oversight committee to evaluate and approve local plans, monitor program outcomes and uses of funds. Requires creation of tri- county homeless services coordination plan.</p> <p>Requires performance reviews and independent financial audits. Metro administrative and oversight costs limited to 5%. Requires voter approval to continue tax after 2030.</p>
Explanatory Statement:	<p>The greater Portland region is facing a severe housing affordability and homelessness crisis. Rents and housing prices have risen faster than wages, making it especially hard for people living on fixed retirement or disability incomes to afford housing. While it is difficult to accurately estimate the number of people experiencing homelessness, or at risk of becoming homeless, according to a February 2020 report by EcoNorthwest, an estimated 38,263 people (24,260 households) experienced homelessness in 2017 in Washington, Clackamas and Multnomah counties; thousands more were at risk.</p> <p>Homelessness disproportionately impacts people with disabilities, people of color, and seniors. For people who experience homelessness, disabling conditions such as mental illness, chronic medical conditions, and addiction are made worse, and become barriers to housing placement.</p> <p>Providing supportive housing services is a widely demonstrated approach to effectively end homelessness for individuals who have experienced</p>

	<p>prolonged and repeated homelessness, and protecting families from becoming homeless with prevention assistance. Supportive housing services include case management, mental healthcare, addiction and recovery treatment, employment services, rent assistance, and other care as needed. Despite state and local efforts to increase investment in supportive housing services, the need in greater Portland exceeds local capacity.</p> <p>This measure will authorize Metro to establish a regional supportive housing funding program, providing the resources to address unmet needs of people experiencing or at risk of experiencing long-term or frequent episodes of homelessness in the greater Portland region. The measure will result in a substantial increase in the delivery of supportive housing services.</p> <p>Supportive housing services will be funded by a marginal personal income tax of 1% on households with taxable income over \$200,000 (or taxable income over \$125,000 for individual tax filers) and a business profits tax of 1% with an exemption for small businesses that have gross receipts of \$5 million or less per year. The personal income tax will be assessed on residents of the Metro district, and on non-residents who have income earned from sources within the district. Only income above \$200,000 (\$125,000 individual) is taxed.</p> <p>In each county a local implementation plan will be developed to describe how supportive housing services will be prioritized and delivered to address local needs. Local plans must be developed using comprehensive community engagement that prioritizes those most directly affected by the homelessness crisis.</p> <p>A regional oversight committee with broad geographic representation will review and evaluate each local plan, monitor local implementation, and review spending. The oversight committee will report every year to Metro Council on program outcomes and areas for improvement, and annual performance and financial audits of funding for supportive housing services will be conducted. Metro administrative costs are limited to 5% and must be reviewed annually. The measure requires voter approval to continue after 2030.</p>
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On Behalf of:

- Metro Council President Lynn Peterson
- Councilor Shirley Craddick
- Councilor Christine Lewis
- Councilor Craig Dirksen
- Councilor Juan Carlos Gonzales
- Councilor Sam Chase
- Councilor Bob Stacey

Submitted by: Carrie MacLaren, Metro Attorney

ADDENDUM B

REGIONAL OVERSIGHT COMMITTEE CHARTER

Background on the Supportive Housing Services Program

On May 19, 2020, voters in the greater Portland region approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of experiencing homelessness. Community members and leaders from around the region developed the measure to provide the much-needed housing and wraparound services to effectively and permanently elevate people out of homelessness.

The ballot measure will fund a new Supportive Housing Services Program that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness. The program is guided by a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color who are disproportionately impacted by housing instability and homelessness.

Implementation of the program will be guided by the following principles:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;
- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

The Supportive Housing Services Program is guided by regional goals and oversight but implemented by Local Implementation Partners who are best positioned to respond to community needs. The program will directly fund Clackamas, Multnomah and Washington counties to invest in local strategies to meet the supportive housing and service needs in their communities.

Regional Oversight Committee Authorizing Ordinance

The Metro Council established the Regional Oversight Committee on 11, 19, 2020 by amending Metro Code Chapter 2.19.270 via Ordinance No. 20-1453.

Regional Oversight Committee's Purpose and Authority

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 and outcomes.

The committee is charged with the following duties:

- Evaluate Local Implementation Plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
- Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals;
- Monitor financial aspects of program administration, including review of program expenditures; and
- Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.

Committee Membership

The committee is composed of 15 voting members (5 members each from Clackamas, Multnomah and Washington counties), appointed by the Metro Council President subject to Metro Council confirmation.

Committee membership represents a diversity of perspectives, geography, demographics, and personal and professional experience, including people with lived experience of homelessness or housing instability from across the region. Committee members serve as independent representatives of the community contributing their experiences and expertise to the oversight work. Members do not represent any specific organizations, jurisdictions or other entities.

The Metro Council President will designate at least one member to serve as chairperson of the committee or may elect to designate two members to serve as co-chairpersons of the committee.

- **Terms of service:** Nine of the initial committee members will be appointed to serve a one-year term and may be reappointed to serve up to two additional two-year terms. All other committee members will be appointed to serve two-year terms and may be reappointed to serve up to two additional two-year terms. The committee will be dissolved in 2031 or upon the issuance of a final report by the committee after all funds authorized by Ballot Measure 26-210 have been spent, whichever is earlier.
- **Attendance:** The committee will meet no fewer than four times a year. Meetings will be more frequent in the first year, and at least quarterly throughout program implementation. In the interest of maintaining continuity in discussions, members commit to attending all meetings unless they are prevented from doing so by reasonable excuse. Committee members will notify staff ahead of meetings if they are unable to be present, and will read materials and request briefings from staff on the information presented, deliberations and outcomes of the meeting. The committee will not use alternates or proxies.

Chairperson(s) Role

Chairperson(s) may be selected by the Metro Council President to support and provide guidance on content and ideas to meet the committee goals, support decision making procedures, and help develop agendas and the work program of the committee.

Metro Council and Staff Roles

Metro Council will appoint committee members, receive committee recommendations and annual review reports to inform Local Implementation Plan approval and policy decisions. Metro staff will facilitate the work program of the committee, provide policy and program information and context as needed to the committee, and work in coordination with programmatic staff from Implementing Partner jurisdictions.

Elected Delegate Role

Elected delegates representing partnering jurisdictions will be present to the oversight and accountability work to receive feedback and direction from the committee relevant to program implementation outcomes, and transfer knowledge and communication directly to their respective jurisdictions. One representative from each of the following jurisdictions will participate on the committee as non-voting delegates:

- Metro Council
- Clackamas County Board of Commissioners
- Multnomah County Board of Commissioners
- Washington County Board of Commissioners
- Portland City Council

Accountability

All committee meetings and materials will be available and accessible to the public, and appropriate notice will be given to inform all interested parties of the time, place and agenda of each meeting.

Committee members are considered public officials under Oregon law and are responsible for complying with provisions in Oregon law, including:

- **Use of position:** Committee members are prohibited from using or attempting to use their position (including access to confidential information obtained through their position) to obtain a financial benefit for themselves, for a relative or for a business with which the member or relative is associated.
- **Conflicts of interest:** Committee members must publicly announce any potential or actual conflicts of interest on each occasion that they are met with the conflict. A conflict of interest occurs when a member's official actions on the committee could or would result in a financial benefit or detriment to themselves, a relative or a business with which the member or relative is associated. In the case of an actual conflict of interest, committee members must refrain from participating in any discussion or taking any action on the issue.

- **Restrictions on political activity:** Committee members may not engage in campaign-related political activity during committee meetings or while working in an official capacity as a committee member. Restricted activities include promoting or opposing candidates, ballot measures or political committees.
- **Public records and meetings:** Committee members are subject to the provisions of Oregon Public Records and Meetings Law. All committee meetings and records shall be open and available to the public. This includes discussions of committee business by email or in gatherings of a quorum of committee members outside of regular committee meetings.

ADDENDUM C

DEFINITIONS FOR SECTIONS 4.2 AND 4.3

Extremely low income: A household earning less than 30 percent of Area Median Income (AMI).

Extremely rent burdened: A household paying 50 percent or more of income toward rent and utilities.

Homelessness: An individual or family who lacks a fixed, regular and adequate nighttime residence including:

- Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason; are living in motels, hotels, trailer parks or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals;
- Individuals or families who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; or
- Individuals or families who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations or similar settings.

Imminent risk of literal homelessness: Any circumstance that provides clear evidence that an individual or family will become literally homeless without supportive housing services within 14 days of application for assistance. This includes but is not limited to:

- Individuals or families who are involuntarily doubled up and who face literal homelessness;
- Individuals exiting an institution (including but not limited to exiting incarceration or foster care) and who face literal homelessness; and
- Individuals or families fleeing a domestic violence or abuse situation and who face literal homelessness.

Involuntarily doubled up: Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason.

Literal homelessness: An individual or family who lacks a fixed, regular and adequate nighttime residence, meaning:

- Has a primary nighttime residence that is a public or private place not meant for human habitation;
- Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
- Is exiting an institution where the individual has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

Long-term and frequent episodes of literal homelessness: 12 or more months of literal homelessness over three years.

Substantial risk of homelessness: A circumstance that exists if a household is very low income and extremely rent burdened, or any other circumstance that would make it more likely than not that without supportive housing services the household will become literally homeless or involuntarily doubled-up.

Supportive housing services: Services for people experiencing homelessness and housing instability including, but not limited to:

- Housing services:
 - supportive housing
 - long-term rent assistance
 - short-term rent assistance
 - housing placement services
 - eviction prevention
 - transitional housing
 - shelter
- Outreach and engagement supports:
 - street outreach services
 - in-reach services
 - basic survival support services
- Health and wellness supports:
 - mental health services
 - interventions and addiction services (crisis and recovery)
 - physical health services
 - intervention services for people with physical impairments and disabilities
 - peer support services
 - discharge intervention services
- Employment and benefit supports:
 - financial literacy services
 - employment services
 - job training and retention services
 - educational services
 - workplace supports
 - benefits navigation and attainment services
- Advocacy supports:
 - landlord tenant education and legal services
 - fair housing advocacy

Very low income: A household earning less than 50 percent of AMI.

ADDENDUM D

LOCAL IMPLEMENTATION PLAN REQUIREMENTS

Each county will prepare a Local Implementation Plan to describe their local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program.

Local Implementation Plans must include:

- A. **Analysis of inequitable outcomes.** An articulation of racial inequities in housing stability and access to current services, including:
 - An analysis of the racial disparities among people experiencing homelessness and the priority service population;
 - An analysis of the racial disparities in access to programs, and housing and services outcomes, for people experiencing homelessness and the priority service populations; and
 - An articulation of barriers to program access that contribute to the disparities identified in the above analysis.
- B. **Racial equity strategies.** A description of mitigation strategies and how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion have been incorporated. This should include a thorough racial equity analysis and strategy that includes clearly defined mitigation strategies and resource allocations intended to remedy existing disparities and ensure equitable access to funds and services.
- C. **Inclusive community engagement.** An articulation of how perspectives and recommendations of Black, Indigenous and people of color, people with lived experiences, and culturally specific groups were considered and incorporated into the development of the plan and will continue to be engaged through implementation and evaluation. Including:
 - Advisory body membership that meets the criteria listed in Section 5.1; and
 - A description of how the plan will remove barriers to participation for organizations and communities by providing stipends, scheduling events at accessible times and locations, and other supportive engagement strategies.
- D. **Priority population investment distribution.** A commitment that funding will be allocated as defined in Section 4.2.
- E. **Current investments.** A review of current system investments or capacity serving priority populations, including:
 - An analysis of the nature and extent of gaps in services to meet the needs of the priority population, broken down by service type, household types and demographic groups.
 - A commitment to maintain local funds currently provided. Supportive Housing Services revenue may not replace current funding levels, with the exception of good cause requests for a temporary waiver such as a broad economic downturn.
- F. **Distribution.** A strategy for equitable geographic distribution of services within the respective jurisdictional boundary and the Metro jurisdictional boundary.

- G. **Access coordination.** A plan for coordinating access to services with partnering jurisdictions and service providers across the region. This includes a commitment that any documentation required for determining program eligibility will be low barrier and include self-reporting options.
- H. **Procurement and partners.** A description of how funds will be allocated to public and nonprofit service providers, including:
- Transparent procurement processes and a description of the workforce equity procurement standards;
 - A commitment to partner with service providers who affirmatively ensure equitable pay and livable wages for their workers, and who will provide anti-racist, gender-affirming services consistent with regionally established, culturally responsive policies and standards; and
 - A description of how funding and technical assistance will be prioritized for providers who demonstrate a commitment to serve Black, Indigenous and people of color with culturally specific and/or linguistically specific services, including programs that have the lowest barriers to entry and actively reach out to communities screened out of other programs.
- I. **Planned investments.** An articulation of programmatic investments planned, including:
- The types of housing services to be funded to address the gap analysis, including specifically:
 - Supportive housing
 - Long-term rent assistance
 - Short-term rent assistance
 - Housing placement services
 - Eviction prevention
 - Shelter and transitional housing
 - A description of the support services to be funded in tandem with these housing services;
 - A commitment to one regional model of long-term rent assistance;
 - A description of other program models for each type of service that define expectations and best practices for service providers;
 - A description of how investments by service type will be phased to increase over the first three years of program implementation as revenues grow, and how decisions will be made to scale investments by service types with funding increases and decreases over time, including a plan to ensure housing stability for program participants; and
 - A description of programming alignment with, and plans to leverage, other investments and systems such as Continuum of Care, Medicaid, behavioral health and capital investments in affordable housing.
- J. **Outcomes, reporting and evaluation.** An agreement to track and report on program outcomes annually as defined through regional coordination and with regional metrics, including:
- A description of annual outcomes anticipated. Goals will be updated annually as programming evolves and based on anticipated annual revenue forecasts. Goals may include:
 - number of supportive housing units created
 - numbers of housing placements made
 - number of eviction preventions
 - rate of successful housing retention, etc.
 - A commitment to tracking outcomes as established and defined through regional coordination and with regionally established metrics. This includes consistency in data disaggregation using regionally standardized values and methodology to understand

- disparate outcomes for people by race, ethnicity, disability status, sexual orientation and gender identity. (See Section 5.2 for the regionally required outcome metrics.)
- A commitment to regional measurable goals to decrease racial disparities among people experiencing homelessness. (See Section 5.2 for the regional measurable goals for advancing racial equity.)
 - A commitment to evaluation standards and procedures to be established through regional coordination. Evaluation will be conducted every three years and include performance of systems coordination, housing and service program types, and services provision.