Before Starting the CoC Application

The CoC Consolidated Application is made up of two parts: the CoC Application and the CoC Priority Listing, with all of the CoC’s project applications either approved and ranked, or rejected. The Collaborative Applicant is responsible for submitting both the CoC Application and the CoC Priority Listing in order for the CoC Consolidated Application to be considered complete.

The Collaborative Applicant is responsible for:

1. Reviewing the FY 2017 CoC Program Competition NOFA in its entirety for specific application and program requirements.

2. Ensuring all questions are answered completely.

3. Reviewing the FY 2017 CoC Consolidated Application Detailed Instructions, which gives additional information for each question.

4. Ensuring all imported responses in the application are fully reviewed and updated as needed.

5. The Collaborative Applicant must review and utilize responses provided by project applicants in their Project Applications.

6. Some questions require the Collaborative Applicant to attach documentation to receive credit for the question. This will be identified in the question.

- Note: For some questions, HUD has provided documents to assist Collaborative Applicants in filling out responses. These are noted in the application.
- All questions marked with an asterisk (*) are mandatory and must be completed in order to submit the CoC Application.

For CoC Application Detailed Instructions click here.
1A. Continuum of Care (CoC) Identification

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1A-1. CoC Name and Number: OR-506 - Hillsboro, Beaverton/Washington County CoC

1A-2. Collaborative Applicant Name: Washington County Department of Housing Services

1A-3. CoC Designation: CA

1A-4. HMIS Lead: Washington County Department of Housing Services
1B. Continuum of Care (CoC) Engagement

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1B-1. From the list below, select those organization(s) and/or person(s) that participate in CoC meetings. Using the drop-down boxes, indicate if the organization(s) and/or person(s): (1) participate in CoC meetings; and (2) vote, including selection of CoC Board members. Responses should be for the period from 5/1/16 to 4/30/17.

<table>
<thead>
<tr>
<th>Organization/Person Categories</th>
<th>Participates in CoC Meetings</th>
<th>Votes, including electing CoC Board Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Government Staff/Officials</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CDBG/HOME/ESG Entitlement Jurisdiction</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Law Enforcement</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Local Jail(s)</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Hospital(s)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>EMT/Crisis Response Team(s)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Mental Health Service Organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Substance Abuse Service Organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Affordable Housing Developer(s)</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Disability Service Organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Disability Advocates</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Public Housing Authorities</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CoC Funded Youth Homeless Organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Non-CoC Funded Youth Homeless Organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Youth Advocates</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>School Administrators/Homeless Liaisons</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CoC Funded Victim Service Providers</td>
<td>Not Applicable</td>
<td>No</td>
</tr>
<tr>
<td>Non-CoC Funded Victim Service Providers</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Domestic Violence Advocates</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Street Outreach Team(s)</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Lesbian, Gay, Bisexual, Transgender (LGBT) Advocates</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>LGBT Service Organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Agencies that serve survivors of human trafficking</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Other homeless subpopulation advocates</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Homeless or Formerly Homeless Persons</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Other:(limit 50 characters)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Applicant: Washington County Department of Housing Services CoC

Project: OR-506 CoC Registration FY2017

<table>
<thead>
<tr>
<th>Organization/person category</th>
<th>Yes</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faith-based organizations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Business and Philanthropic</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Federal and State Government Officials</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Applicant must select Yes, No or Not Applicable for all of the listed organization/person categories in 1B-1.

1B-1a. Describe the specific strategy(s) the CoC uses to solicit and consider opinions from organizations and/or persons that have an interest in preventing or ending homelessness.

(limit 1000 characters)

The CoC solicits and collects public comment on how to prevent and end homelessness through community outreach activities at forums and town hall events, task force and subcommittee meetings, use of the CoCs email listserv with nearly 500 contacts, monthly CoC planning meetings, and surveys. Opinions received are discussed at regular CoC meetings with new approaches and actions incorporated into the CoC planning and funding priorities in alignment with the jurisdiction’s 10-Year Plan to End Homelessness and the Consolidated Plan. This approach has resulted in actions that bring subject matter experts to CoC meetings to further investigate new initiatives, prioritize funds to address gaps in the homeless system, and has built collaborative partnerships in presenting community-responsive project proposals. Action on recommendations is guided by the CoC Governance policy that includes a collaborative discussion and consensus decision-making process by vote.

1B-2. Describe the CoC's open invitation process for soliciting new members, including any special outreach.

(limit 1000 characters)

The CoC invitation process to solicit new members involves monthly posting of the CoC planning meeting agenda on the website and public bulletin boards, notices released through community outreach activities at forums and meetings, and social media. Daily new members join the CoC through communication within the CoC email listserv (nearly 500 contacts), and CoC members extend person-to-person invites to community members, friends and business associates. On average, the CoC has three formerly homeless/homeless consumers attend the monthly CoC planning meetings as a result of engagement and invitation by service providers and outreach staff. New CoC members receive the CoCs Governance policy, an overview of the jurisdiction’s 10-Year Plan and Consolidated Plan, and funding timelines to include CoC Program, ESG, CDBG, HOME, and local initiatives.

1B-3. Describe how the CoC notified the public that it will accept and consider proposals from organizations that have not previously received CoC Program funding in the FY 2017 CoC Program Competition, even if the CoC is not applying for new projects in FY 2017. The response must include the date(s) the CoC made publicly knowing they were open to proposals.

(limit 1000 characters)
On 7/27/17, the CoC Collaborative Applicant released a Request For Proposal (RFP) notifying the public that project applications are being accepted from current and new organizations that have not previously received CoC Program funding. The RFP was emailed to nearly 500 people on the CoC email listserv, posted on the jurisdiction’s website and three public bulletin boards in the community. On 8/2/17, the RFP was announced at the CoC planning meeting, and 8/13/17 the notice was released on social media; e.g. Facebook and Twitter.

The RFP encourages reallocation of current projects to create new permanent housing and the availability of permanent supportive housing bonus funds, and a timeline with dates for submitting applications, the CoCs review of new project proposals, and a link to the CoC Program Application and Award Process, policy 578.9-OR506CoC, that outlines details on ranking and rating selection criteria.
1C. Continuum of Care (CoC) Coordination

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1C-1. Using the chart below, identify the Federal, State, Local, Private and Other organizations that serve homeless individuals, families, unaccompanied youth, persons who are fleeing domestic violence, or those at risk of homelessness that are included in the CoCs coordination; planning and operation of projects. Only select "Not Applicable" if the funding source(s) do not exist in the CoC’s geographic area.

<table>
<thead>
<tr>
<th>Entities or Organizations the CoC coordinates planning and operation of projects</th>
<th>Coordinates with Planning and Operation of Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Opportunities for Persons with AIDS (HOPWA)</td>
<td>Yes</td>
</tr>
<tr>
<td>Temporary Assistance for Needy Families (TANF)</td>
<td>Yes</td>
</tr>
<tr>
<td>Runaway and Homeless Youth (RHY)</td>
<td>Yes</td>
</tr>
<tr>
<td>Head Start Program</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing and service programs funded through Department of Justice (DOJ) resources</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing and service programs funded through Health and Human Services (HHS) resources</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing and service programs funded through other Federal resources</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing and service programs funded through state government resources</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing and service programs funded through local government resources</td>
<td>Yes</td>
</tr>
<tr>
<td>Housing and service programs funded through private entities, including foundations</td>
<td>Yes</td>
</tr>
<tr>
<td>Other:(limit 50 characters)</td>
<td></td>
</tr>
<tr>
<td>Faith-based service programs</td>
<td>Yes</td>
</tr>
</tbody>
</table>

1C-2. Describe how the CoC actively consults with Emergency Solutions Grant (ESG) recipient’s in the planning and allocation of ESG funds. Include in the response: (1) the interactions that occur between the CoC and the ESG Recipients in the planning and allocation of funds; (2) the CoCs participation in the local Consolidated Plan jurisdiction(s) process by providing Point-in-Time (PIT) and Housing Inventory Count (HIC) data to the Consolidated Plan jurisdictions; and (3) how the CoC ensures local homelessness information is clearly communicated and addressed in Consolidated Plan updates. (limit 1000 characters)

Two ESG recipients include the local Washington County Office of Community Development (OCD) and the state Oregon Housing and Community Services (OHCS). ESG consultations include planning analysis based on data from the
PIT and HIC gaps analysis, poverty trends, a report on ESG performance outcomes, and review of the 10-Year Plan and 2015-2020 Consolidated Plan priorities. CoC ESG consultations occurred 11/2/16 with OHCS and 3/1/17 with OCD.

Three Consolidated Plan jurisdictions are located in the CoC to include Washington County and the cities of Beaverton and Hillsboro that forms a Washington County Consortium. Semi-annually the CoC participates in the Plan development and reporting to include the Action Plan and the CAPER. PIT, HIC, poverty, and population data is provided to support the Plan’s Housing Needs Assessment and Market Analysis. CoC input is incorporated in the Plan and communicated through website, CoC email listserv of nearly 500 contacts, social media, and US Mail.

1C-3. CoCs must demonstrate the local efforts to address the unique needs of persons, and their families, fleeing domestic violence that includes access to housing and services that prioritizes safety and confidentiality of program participants. (limit 1000 characters)

Domestic Violence Resource Center (DVRC) and the centralized Community Connect (CC) system staff are trained in Trauma Informed Care and use standard questions administered in a secure and safe manner to assess the unique needs of persons fleeing or experiencing domestic violence (DV). Aligned with the DVRC Crisis Line and CC are shelters funded by local government and ESG; housing funded by local government and DOJ; and client-centered services funded by Oregon HHS and private contributions. The CoCs victim-centered practices provide personal safety and choice in housing options while recognizing the interests and needs of the survivor and their family. Referral to services that foster self-determination, housing choice is provided to survivors in alignment with local government, CoC Program and ESG-funded housing options. Program staff follow written standards to ensure safety and privacy of DV survivor case files and a comparable HMIS database with limited access secures data.

1C-3a. CoCs must describe the following: (1) how regular training is provided to CoC providers and operators of coordinated entry processes that addresses best practices in serving survivors of domestic violence; (2) how the CoC uses statistics and other available data about domestic violence, including aggregate data from comparable databases, as appropriate, to assess the scope of community needs related to domestic violence and homelessness; and (3) the CoC safety and planning protocols and how they are included in the coordinated assessment. (limit 1,000 characters)

CoC providers and Community Connect (CC) staff, a centralized assessment system, are trained in Trauma Informed Care upon employment, with annual refresher training in recognizing and responding to the physical, emotion and psychological effects of trauma (see Community Connect policy, Section 10 Training). Data from the DVRC Crisis Line and CC is reviewed quarterly to determine the scope and needs of the DV population to include: number of people; race/ethnicity and cultural sensitive service needs; gender and LGBT
1C-4. Using the chart provided, for each of the Public Housing Agency’s (PHA) in the CoC’s geographic area: (1) identify the percentage of new admissions to the Public Housing or Housing Choice Voucher (HCV) Programs in the PHA’s that were homeless at the time of admission; and (2) indicate whether the PHA has a homeless admission preference in its Public Housing and/or HCV program.

Attachment Required: If the CoC selected, "Yes-Public Housing", "Yes-HCV" or "Yes-Both", attach an excerpt from the PHA(s) written policies or a letter from the PHA(s) that addresses homeless preference.

<table>
<thead>
<tr>
<th>Public Housing Agency Name</th>
<th>% New Admissions into Public Housing and Housing Choice Voucher Program during FY 2016 who were homeless at entry</th>
<th>PHA has General or Limited Homeless Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Authority of Washington County, PHA # OR022</td>
<td>24.00%</td>
<td>Yes-Both</td>
</tr>
</tbody>
</table>

If you select "Yes--Public Housing," "Yes--HCV," or "Yes--Both" for "PHA has general or limited homeless preference," you must attach documentation of the preference from the PHA in order to receive credit.

1C-4a. For each PHA where there is not a homeless admission preference in their written policies, identify the steps the CoC has taken to encourage the PHA to adopt such a policy.

(limit 1000 characters)

Not applicable.

1C-5. Describe the actions the CoC has taken to: (1) address the needs of Lesbian, Gay, Bisexual, Transgender (LGBT) individuals and their families experiencing homelessness, (2) conduct regular CoC-wide training with providers on how to effectively implement the Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity, including Gender Identify Equal Access to Housing, Final Rule; and (3) implementation of an anti-discrimination policy.

(limit 1000 characters)

On 8/3/2016 the CoC updated policy standards on anti-discrimination to address the needs of LGBT populations. The Community Connect (CC)
centralized assessment policy and ESG Manual require shelter/housing placement and accommodation be made in a manner that supports the individual’s gender identity, with annual monitoring for compliance of programs. The CC and programs have written procedures in place, and provide annual training for intake staff; e.g CoC, ESG and HOPWA-funded staff attended Equal Access Rule training on 7/15/16 sponsored by the HUD Portland Field Office in Oregon. Providers train new staff upon hire, and provide the opportunity to attend re-fresher training sponsored by the Fair Housing Council of Oregon and HUD. Annually the Washington County Office of Community Development hosts Fair Housing training and is seeking to implement training on LGBTQ. The established written anti-discrimination policies include Community Connect (Section 9) and ESG Manual (Page 38).

1C-6. Criminalization: Select the specific strategies implemented by the CoC to prevent the criminalization of homelessness in the CoC’s geographic area. Select all that apply.

| Engaged/educated local policymakers: | X |
| Engaged/educated law enforcement: | X |
| Engaged/educated local business leaders | X |
| Implemented communitywide plans: | X |
| No strategies have been implemented | |

Other:(limit 50 characters)

Engaged public through Community Meetings | X |

When "No Strategies have been implemented" is selected no other checkbox may be selected.
1D. Continuum of Care (CoC) Discharge Planning

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1D-1. Discharge Planning-State and Local: Select from the list provided, the systems of care the CoC coordinates with and assists in state and local discharge planning efforts to ensure those who are discharged from that system of care are not released directly to the streets, emergency shelters, or other homeless assistance programs. Check all that apply.

<table>
<thead>
<tr>
<th>System of Care</th>
<th>X</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foster Care</td>
<td>X</td>
</tr>
<tr>
<td>Health Care</td>
<td>X</td>
</tr>
<tr>
<td>Mental Health Care</td>
<td></td>
</tr>
<tr>
<td>Correctional Facilities</td>
<td>X</td>
</tr>
<tr>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

1D-1a. If the applicant did not check all the boxes in 1D-1, provide: (1) an explanation of the reason(s) the CoC does not have a discharge policy in place for the system of care; and (2) provide the actions the CoC is taking or plans to take to coordinate with or assist the State and local discharge planning efforts to ensure persons are not discharged to the street, emergency shelters, or other homeless assistance programs. (limit 1000 characters)

Not applicable.

1D-2. Discharge Planning: Select the system(s) of care within the CoC’s geographic area the CoC actively coordinates with to ensure persons who have resided in any of the institutions listed below longer than 90 days are not discharged directly to the streets, emergency shelters, or other homeless assistance programs. Check all that apply.

<table>
<thead>
<tr>
<th>System of Care</th>
<th>X</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foster Care</td>
<td>X</td>
</tr>
<tr>
<td>Health Care</td>
<td>X</td>
</tr>
</tbody>
</table>
### Mental Health Care

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental Health Care:</td>
<td>X</td>
</tr>
</tbody>
</table>

### Correctional Facilities

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Correctional Facilities:</td>
<td>X</td>
</tr>
</tbody>
</table>

### None

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>None:</td>
<td></td>
</tr>
</tbody>
</table>
1E. Continuum of Care (CoC) Project Review, Ranking, and Selection

Instructions

For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1E-1. Using the drop-down menu, select the appropriate response(s) that demonstrate the process the CoC used to rank and select project applications in the FY 2017 CoC Program Competition which included (1) the use of objective criteria; (2) at least one factor related to achieving positive housing outcomes; and (3) included a specific method for evaluating projects submitted by victim service providers.

Attachment Required: Public posting of documentation that supports the process the CoC used to rank and select project application.

<table>
<thead>
<tr>
<th>Used Objective Criteria for Review, Rating, Ranking and Section</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Included at least one factor related to achieving positive housing outcomes</td>
<td>Yes</td>
</tr>
<tr>
<td>Included a specific method for evaluating projects submitted by victim service providers</td>
<td>Yes</td>
</tr>
</tbody>
</table>

1E-2. Severity of Needs and Vulnerabilities

CoCs must provide the extent the CoC considered the severity of needs and vulnerabilities experienced by program participants in their project ranking and selection process. Describe: (1) the specific vulnerabilities the CoC considered; and (2) how the CoC takes these vulnerabilities into account during the ranking and selection process. (See the CoC Application Detailed Instructions for examples of severity of needs and vulnerabilities.)

Selection of projects is based on a point values aligned with the CoCs low-barrier housing focus, severity of need populations, and project performance. The CoC Program Application and Award Process policy outlines the process in rating and ranking projects where all beds dedicated for the vulnerable population receive extra points, and all projects required to serve zero to 30 percent AMI households. Receiving the highest vulnerability score are projects dedicated to serve chronic homeless or homeless veterans followed by survivors of domestic violence/human-trafficking, people with criminal histories, and persons with active or history of substance abuse. CoC APR data is extrapolated from HMIS for each CoC Program-funded project to create a project rating matrix with a total score derived from vulnerability criteria and performance outcomes. The CoC Board reviews the project scores and ranks projects into Tier 1 and Tier 2.
1E-3. Using the following checklist, select: (1) how the CoC made publicly available to potential project applicants an objective ranking and selection process that was used for all project (new and renewal) at least 2 days before the application submission deadline; and (2) all parts of the CoC Consolidated Application, the CoC Application attachments, Priority Listing that includes the reallocation forms and Project Listings that show all project applications submitted to the CoC were either accepted and ranked, or rejected and were made publicly available to project applicants, community members and key stakeholders.

Attachment Required: Documentation demonstrating the objective ranking and selections process and the final version of the completed CoC Consolidated Application, including the CoC Application with attachments, Priority Listing with reallocation forms and all project applications that were accepted and ranked, or rejected (new and renewal) was made publicly available. Attachments must clearly show the date the documents were publicly posted.

<table>
<thead>
<tr>
<th>Public Posting</th>
</tr>
</thead>
<tbody>
<tr>
<td>CoC or other Website</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Mail</td>
</tr>
<tr>
<td>Advertising in Local Newspaper(s)</td>
</tr>
<tr>
<td>Advertising on Radio or Television</td>
</tr>
<tr>
<td>Social Media (Twitter, Facebook, etc.)</td>
</tr>
</tbody>
</table>

1E-4. Reallocation: Applicants must demonstrate the ability to reallocate lower performing projects to create new, higher performing projects. CoC’s may choose from one of the following two options below to answer this question. You do not need to provide an answer for both.

Option 1: The CoC actively encourages new and existing providers to apply for new projects through reallocation.
Attachment Required - Option 1: Documentation that shows the CoC actively encouraged new and existing providers to apply for new projects through reallocation.

Option 2: The CoC has cumulatively reallocated at least 20 percent of the CoC’s ARD between FY 2013 and FY 2017 CoC Program Competitions.
No Attachment Required - HUD will calculate the cumulative amount based on the CoCs reallocation forms submitted with each fiscal years Priority Listing.

**Reallocation:** Option 1
Attachment Required - provide documentation that shows the CoC actively encouraged new and existing providers to apply for new projects through reallocation.

1E-5. If the CoC rejected or reduced project application(s), enter the date the CoC and Collaborative Applicant notified project applicants their project application(s) were being rejected or reduced in writing outside of e-snaps.

Attachment Required: Copies of the written notification to project applicant(s) that their project application(s) were rejected. Where a project application is being rejected or reduced, the CoC must indicate the reason(s) for the rejection or reduction.

1E-5a. Provide the date the CoC notified applicant(s) their application(s) were accepted and ranked on the Priority Listing, in writing, outside of e-snaps.

Attachment Required: Copies of the written notification to project applicant(s) their project application(s) were accepted and ranked on the Priority listing.
Reallocation Supporting Documentation

Attachment Required - provide documentation that shows the CoC actively encouraged new and existing providers to apply for new projects through reallocation.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Required?</th>
<th>Document Description</th>
<th>Date Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reallocation Supporting Documentation</td>
<td>No</td>
<td>Reallocation Supp...</td>
<td>09/13/2017</td>
</tr>
</tbody>
</table>
Attachment Details

Document Description: Reallocation Supporting Documentation
2A. Homeless Management Information System (HMIS) Implementation

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

2A-1. Does the CoC have in place a Governance Charter or other written documentation (e.g., MOU/MOA) that outlines the roles and responsibilities of the CoC and HMIS Lead?
Yes
Attachment Required: If “Yes” is selected, a copy of the sections of the Governance Charter, or MOU/MOA addressing the roles and responsibilities of the CoC and HMIS Lead.

2A-1a. Provide the page number(s) where the roles and responsibilities of the CoC and HMIS Lead can be found in the attached document(s) referenced in 2A-1. In addition, indicate if the page number applies to the Governance Charter or MOU/MOA.
Page 5, Appendix A of the HMIS Governance Policy

Yes

2A-3. What is the name of the HMIS software vendor?
Mediware (formerly Bowman-Systems)

2A-4. Using the drop-down boxes, select the HMIS implementation Coverage area.
Statewide HMIS (multiple CoC)

2A-5. Per the 2017 HIC use the following chart to indicate the number of beds in the 2017 HIC and in HMIS for each project type within the CoC. If a particular project type does not exist in the CoC then enter “0” for all cells
<table>
<thead>
<tr>
<th>Project Type</th>
<th>Total Beds in 2017 HIC</th>
<th>Total Beds in HIC Dedicated for DV</th>
<th>Total Beds in HMIS</th>
<th>HMIS Bed Coverage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Shelter (ESG) beds</td>
<td>96</td>
<td>24</td>
<td>72</td>
<td>100.00%</td>
</tr>
<tr>
<td>Safe Haven (SH) beds</td>
<td>10</td>
<td>0</td>
<td>10</td>
<td>100.00%</td>
</tr>
<tr>
<td>Transitional Housing (TH) beds</td>
<td>142</td>
<td>8</td>
<td>124</td>
<td>92.54%</td>
</tr>
<tr>
<td>Rapid Re-Housing (RRH) beds</td>
<td>140</td>
<td>0</td>
<td>140</td>
<td>100.00%</td>
</tr>
<tr>
<td>Permanent Supportive Housing (PSH) beds</td>
<td>475</td>
<td>0</td>
<td>475</td>
<td>100.00%</td>
</tr>
<tr>
<td>Other Permanent Housing (OPH) beds</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

2A-5a. To receive partial credit, if the bed coverage rate is below 85 percent for any of the project types, the CoC must provide clear steps on how it intends to increase this percentage for each project type over the next 12 months.
(limit 1000 characters)
Not applicable.

2A-6. Annual Housing Assessment Report (AHAR) Submission: How many Annual Housing Assessment Report (AHAR) tables were accepted and used in the 2016 AHAR?

12

2A-7. Enter the date the CoC submitted the 2017 Housing Inventory Count (HIC) data into the Homelessness Data Exchange (HDX). (mm/dd/yyyy)

04/18/2017
2B. Continuum of Care (CoC) Point-in-Time Count

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

2B-1. Indicate the date of the CoC's 2017 PIT count (mm/dd/yyyy). If the PIT count was conducted outside the last 10 days of January 2017, HUD will verify the CoC received a HUD-approved exception.

01/25/2017

2B-2. Enter the date the CoC submitted the PIT count data in HDX. (mm/dd/yyyy)

04/27/2017
2C. Continuum of Care (CoC) Point-in-Time (PIT) Count: Methodologies

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

2C-1. Describe any change in the CoC’s sheltered PIT count implementation, including methodology and data quality changes from 2016 to 2017. Specifically, how those changes impacted the CoCs sheltered PIT count results. (limit 1000 characters)

Not applicable.
The CoC used the same PIT methodology from 2016 PIT to complete the 2017 PIT homeless count. The CoC began using HMIS to generate the sheltered PIT in 2008 and continues to use this process to create reliable data on total number and characteristics of our homeless population and subpopulations. The sheltered PIT is prepared using ServicePoint HMIS and extrapolating data from Emergency Shelter, Transitional Housing and Safe Haven beds to prepare the sheltered PIT count. A comparable HMIS database is used to extrapolate data for survivors of domestic violence in shelter and transitional housing programs.

2C-2. Did your CoC change its provider coverage in the 2017 sheltered count?  Yes

2C-2a. If “Yes” was selected in 2C-2, enter the change in provider coverage in the 2017 sheltered PIT count, including the number of beds added or removed due to the change.

| Beds Added: | 8 |
| Beds Removed: | 4 |
| Total: | 4 |

2C-3. Did your CoC add or remove emergency shelter, transitional housing, or Safe-Haven inventory because of funding specific to a Presidentially declared disaster resulting in a change to the CoC’s 2017 sheltered PIT count?  No

2C-3a. If "Yes" was selected in 2C-3, enter the number of beds that were added or removed in 2017 because of a Presidentially declared disaster.
2C-4. Did the CoC change its unsheltered PIT count implementation, including methodology and data quality changes from 2016 to 2017? Yes

CoCs that did not conduct an unsheltered count in 2016 or did not report unsheltered PIT count data to HUD in 2016 should compare their efforts in 2017 to their efforts in 2015.

2C-4a. Describe any change in the CoC’s unsheltered PIT count implementation, including methodology and data quality changes from 2016 to 2017. Specify how those changes impacted the CoC’s unsheltered PIT count results. See Detailed Instructions for more information. (limit 1000 characters)

The CoC made changes to the 2017 Unsheltered PIT data collection process and tool to include: expanded number of training sessions for provider staff on sheltered programs (2 sessions) and volunteer training to perform the street count to include focus on youth, veterans and chronically homeless subpopulations (3 sessions); implemented collection of all Personal Identifying Information (PII) that is used to improve data quality for de-duplication of unsheltered populations in HMIS; and added questions that improved the ability to identify individuals that meet the HUD definition of chronic homelessness as defined in 24 CFR Parts 91 and 578.3 and the 2014 HMIS Data Standards 3.917. These changes resulted in reliable data that reflects an increase in chronic homeless (150 people in 2017 as compared to 142 in 2016), and an increase in youth homelessness (45 people in 2017 as compared to 37 in 2016).

2C-5. Did the CoC implement specific measures to identify youth in their PIT count? Yes

2C-5a. If "Yes" was selected in 2C-5, describe the specific measures the CoC; (1) took to identify homeless youth in the PIT count; (2) during the planning process, how stakeholders that serve homeless youth were engaged; (3) how homeless youth were engaged/involved; and (4) how the CoC worked with stakeholders to select locations where homeless youth are most likely to be identified. (limit 1000 characters)

The CoC expanded unsheltered PIT count activities to include a robust approach to count runaway and unaccompanied homeless youth. Six planning sessions were held to develop the approach to count youth at known locations and events that included youth-focused agencies: McKinney-Vento Homeless School Liaisons, HomePlate Youth Services outreach team, Boys & Girls Aid,
and Community Action. Concentrated street outreach during the PIT included: soup kitchens; mass-transit/MAX transportation; bottle return, youth walk-in centers; campsites, youth and families engaged with School Liaisons; and Project Homeless Connect on 1/27/17. PIT data collection included all personally identifying information (PII) that was entered into ServicePoint HMIS and de-duplicated, providing a reliable data quality report on the number of homeless youth and their characteristics that results in an increase in youth homelessness.

2C-6. Describe any actions the CoC implemented in its 2017 PIT count to better count individuals and families experiencing chronic homelessness, families with children, and Veterans experiencing homelessness. (limit 1000 characters)

The CoC improved PIT capability due to increased staff and volunteers (35) with cross-sector representation: formerly homeless, US Veteran Affairs, PATH and ESG-funded Outreach, Homeless School Liaisons, shelter staff, and mental health service providers that performed planning and count activities beginning in August following HUD release of CPD 16-060 on 8/8/16. Actions included: PIT teams received training on how to conduct a survey of homeless that addresses collection of personal information, privacy and voluntary response on disability, and criteria for specific subpopulation, e.g. chronic, veteran, youth, and family with children; PIT teams had one formerly homeless individual or one stakeholder on the team and were dispersed within 10-geocode CoC areas identified by date (one on each of last 7 days in January) to maximize contact with homeless and reduce duplication; and expanded additional nighttime hours to improve fidelity of counting people where they reside.
3A. Continuum of Care (CoC) System Performance

Instructions
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

3A-1. Performance Measure: Reduction in the Number of First-Time Homeless. Describe: (1) the numerical change the CoC experienced; (2) the process the CoC used to identify risk factors of becoming homeless for the first time; (3) the strategies in place to address individuals and families at risk of becoming homeless; and (4) the organization or position that is responsible for overseeing the CoC’s strategy to reduce or end the number of individuals and families experiencing homelessness for the first time.
(limit 1000 characters)
A decrease in First-Time Homeless in ES, SH, TH and PH was reported with 715 persons in FY2016 (746 persons in FY2015). Process to identify risk factors include data analysis of Community Connect (CC), a centralized assessment system, that reports first-time homeless risk factors to include: an increase in poverty (12.5 % of jurisdictions population), rising rent costs (average 1-bed unit $1,204 month), low housing vacancy rate (3.3%) and gap of 14,000 affordable housing units; lack of education; criminal history; a loss of family support; abuse/domestic violence; and physical/psychological/addiction related disabilities. On 7/1/16 a new prevention strategy included local government rent assistance funds for severely rent burdened households that leveraged a Housing Specialist to assist households to address their housing instability. Expanded outreach and re-housing activities aligned with CC. Washington County Housing Services is responsible for overseeing strategy implementation.

3A-2. Performance Measure: Length-of-Time Homeless. CoC’s must demonstrate how they reduce the length-of-time for individuals and families remaining homeless. Describe (1) the numerical change the CoC experienced; (2) the actions the CoC has implemented to reduce the length-of-time individuals and families remain homeless; (3) how the CoC identifies and houses individuals and families with the longest length-of-time homeless; and (4) identify the organization or position that is responsible for overseeing the CoC’s strategy to reduce the length-of-time individuals and families remain homeless.
(limit 1000 characters)
A decrease in average Length-of-Time (LOT) in ES, SH and TH was reported with 105 nights in FY2016 (110 nights in FY2015). The LOT ES and SH remains the same at 53 nights in 2016 and 2015. Actions to reduce LOT include emphasis on developing long-term housing plan
and turn-over of SH and TH beds with permanent housing placement, and developing relationships with property managers of rental units to rehouse homeless individuals and families. The combined actions have proved to be successful in PH placement and reduction of LOT. The CoC identifies persons with longest LOT at Community Connect (CC) and prioritize these individuals for re-housing; e.g. chronic homeless are never turned away and are provided PSH. CoC adopted HUD CPD 16-011 on 8/3/16, with Washington County Housing Services responsible for overseeing strategy implementation.

3A-3. Performance Measures: Successful Permanent Housing Placement and Retention
Describe: (1) the numerical change the CoC experienced; (2) the CoC’s strategy to increase the rate of which individuals and families move to permanent housing destination or retain permanent housing; and (3) the organization or position responsible for overseeing the CoC’s strategy for retention of, or placement in permanent housing.
(limit 1000 characters)

91% successful exit to or retention in PH in FY2016 (93% in FY2015). A larger universe of participants in PH projects is reported in FY2016 (539 persons), as compared to 515 in FY2015. Strategies to increase exits include: peer support to engage participants in job skills and employment, provider staff that assist homeless in accessing mainstream benefits, and provider organizations support participant exit from PSH to PH with a Section 8 subsidy provide by Administrative Preference to PSH participants who lose services through no fault of their own and can live independently; e.g. Service provider can no longer bill for reimbursement of treatment, participant acquires private insurance, etc. To increase housing retention, participants receive Rent Well Tenant Education. The CoC continues to focus on housing retention and exits to PH with peer mentoring on job skills and employment. Washington County Housing Services is responsible for overseeing strategy implementation.

Describe: (1) the numerical change the CoC experienced, (2) what strategies the CoC implemented to identify individuals and families who return to homelessness, (3) the strategies the CoC will use to reduce additional returns to homelessness, and (4) the organization or position responsible for overseeing the CoC’s efforts to reduce the rate of individuals and families’ returns to homelessness.
(limit 1000 characters)

11% return to homelessness (74 persons out of a total 654 persons) in FY2016 (11% in FY2015). While returns to homelessness remains the same, recidivism has increased for persons exiting shelter (ES) and decreased in Street Outreach programs. The primary factors resulting in a return to homelessness for families exiting ES is poverty and rising rental costs. The CoC addresses recidivism at the Community Connect assessment, and refers the homeless individual and their family to the most appropriate housing option based on the family needs assessment that looks at previous program participation and changes in the household composition. A “Master List” workgroup was developed that meets monthly to case conference homeless veterans and chronically homeless, and
in the next 12-months will expand to begin case conferencing of individuals and families that return to homelessness. Community Action is responsible for overseeing strategy implementation.

3A-5. Performance Measures: Job and Income Growth
Describe: (1) the strategies that have been implemented to increase access to employment and mainstream benefits; (2) how the CoC program-funded projects have been assisted to implement the strategies; (3) how the CoC is working with mainstream employment organizations to help individuals and families increase their cash income; and (4) the organization or position that is responsible for overseeing the CoC’s strategy to increase job and income growth from employment, non-employment including mainstream benefits.
(limit 1000 characters)
53% adults exit with cash income in FY2016 (32% in 2015). CoC strategies include the Aligned Partnership where participants assisted to navigate WorkSource Oregon (Department of Employment) to access job skills training, training in ESL (English Second Language), internships, and employment linkage. Federal WIOA-funded programs include Health Careers NW, SummerWorks for youth, TechTownPDX, and Aligned Partner. Persons with disabilities access employment through Oregon Vocational Rehabilitation. Strategies in accessing mainstream benefits include how to apply for TANF benefits to include JobsPLUS, the Social Security Administration provides training on completing SSI/SSDI applications, and the Program ASSIST works with disabled homeless to apply for SSDI and provides SOAR training to CoC providers. Program-funded projects access resources through outreach presentations at CoC meetings. Washington County Housing Services is responsible for overseeing strategy implementation.

3A-6. Did the CoC completely exclude a geographic area from the most recent PIT count (i.e. no one counted there, and for communities using samples in the area that was excluded from both the sample and extrapolation) where the CoC determined there were no unsheltered homeless people, including areas that are uninhabitable (deserts, forests).

No

3A.6a. If the response to 3A-6 was “Yes”, what was the criteria and decision-making process the CoC used to identify and exclude specific geographic areas from the CoCs unsheltered PIT count?
(limit 1000 characters)
Not applicable.

3A-7. Enter the date the CoC submitted the System Performance Measures data in HDX, which included the data quality section for FY
2016.
(mm/dd/yyyy)
3B. Continuum of Care (CoC) Performance and Strategic Planning Objectives

Instructions

For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

3B-1. Compare the total number of PSH beds, CoC program and non CoC-program funded, that were identified as dedicated for yes by chronically homeless persons in the 2017 HIC, as compared to those identified in the 2016 HIC.

<table>
<thead>
<tr>
<th>Number of CoC Program and non-CoC Program funded PSH beds dedicated for use by chronically homelessness persons identified on the HIC.</th>
<th>2016</th>
<th>2017</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>163</td>
<td>147</td>
<td>-16</td>
</tr>
</tbody>
</table>

3B-1.1. In the box below: (1) "total number of Dedicated PLUS Beds" provide the total number of beds in the Project Allocation(s) that are designated ad Dedicated PLUS beds; and (2) in the box below "total number of beds dedicated to the chronically homeless:, provide the total number of beds in the Project Application(s) that are designated for the chronically homeless. This does not include those that were identified in (1) above as Dedicated PLUS Beds.

- Total number of beds dedicated as Dedicated Plus: 0
- Total number of beds dedicated to individuals and families experiencing chronic homelessness: 80
- Total: 80

3B-1.2. Did the CoC adopt the Orders of Priority into their standards for all CoC Program funded PSH projects as described in Notice CPD-16-11: Prioritizing Persons Experiencing Chronic Homelessness and Other Vulnerable Homeless Persons in Permanent Supportive Housing.

Yes

3B-2.1. Using the following chart, check each box to indicate the factor(s) the CoC currently uses to prioritize households with children based on need during the FY 2017 Fiscal Year.

| History of or Vulnerability to Victimization | X |
| Number of previous homeless episodes | X |
3B-2.2. Describe: (1) the CoCs current strategy and timeframe for rapidly rehousing every household of families with children within 30 days of becoming homeless; and (2) the organization or position responsible for overseeing the CoC’s strategy to rapidly rehouse families with children within 30 days of becoming homeless. (limit 1000 characters)

To achieve rehousing of families within 30 days, the Community Connect (CC) centralized assessment staff refer families to Housing Specialists (HS) that use housing-first model with tenant-based rent subsidy and landlord relationships in CoC Program, ESG, and SSVF-funded programs. The referral includes housing choice to accommodate youth in their school of origin and affordability of housing. Not all families can lease housing within 30-days due to housing barriers (e.g. bad credit, criminal history, zero to low-income), and are provided emergency shelter with case management to address the housing barriers. The CC assessment and referral system provides rapid access to the homeless system resources and the Housing Specialists provide support during the application and lease-up process. The effectiveness of this strategy will be leveraged when the low vacancy rate and increased affordable housing become available. Community Action oversees the CC and HS staff.

3B-2.3. Compare the number of RRH units available to serve families from the 2016 and 2017 HIC.

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of CoC Program and non-CoC Program funded PSH units dedicated for use by chronically homelessness persons identified on the HIC.</td>
<td>44</td>
<td>39</td>
<td>-5</td>
</tr>
</tbody>
</table>

3B-2.4. Describe the actions the CoC is taking to ensure emergency shelters, transitional housing, and permanent supportive housing (PSH and RRH) providers within the CoC adhere to anti-discrimination policies by not denying admission to, or separating any family members from other members of their family or caregivers based on age, sex, gender, LGBT status, marital status or disability when entering a shelter or Housing. (limit 1000 characters)

The CoC expects shelter and housing providers will accommodate individuals in accordance with the Equal Access Act and Fair Housing. The CoC has established policies (Community Connect Section 9 p. 12, Appendix 10.11, and ESG Manual Section 7 p. 42) that prohibit denying admission to or separating any family members from other member of their family based on age, sex,
gender, LGBT status, marital status or disability. Annual on-site monitoring is performed at all ESG and CoC Program-funded project sites to ensure compliance to the policy and Federal law, to include review of the provider agency written standards and policy and compliance with Section 504 Non-Discrimination Based on Handicap. Providers are required to provide homeless with a written Grievance policy and process at the intake meeting.

3B-2.5. From the list below, select each of the following the CoC has strategies to address the unique needs of unaccompanied homeless youth.

| Human trafficking and other forms of exploitation? | Yes |
| LGBT youth homelessness? | Yes |
| Exits from foster care into homelessness? | Yes |
| Family reunification and community engagement? | Yes |
| Positive Youth Development, Trauma Informed Care, and the use of Risk and Protective Factors in assessing youth housing and service needs? | Yes |

3B-2.6. From the list below, select each of the following the CoC has a strategy for prioritization of unaccompanied youth based on need.

| History or Vulnerability to Victimization (e.g., domestic violence, sexual assault, childhood abuse) | X |
| Number of Previous Homeless Episodes | X |
| Unsheltered Homelessness | X |
| Criminal History | X |
| Bad Credit or Rental History | X |

3B-2.7. Describe: (1) the strategies used by the CoC, including securing additional funding to increase the availability of housing and services for youth experiencing homelessness, especially those experiencing unsheltered homelessness; (2) provide evidence the strategies that have been implemented are effective at ending youth homelessness; (3) the measure(s) the CoC is using to calculate the effectiveness of the strategies; and (4) why the CoC believes the measure(s) used is an appropriate way to determine the effectiveness of the CoC’s efforts. (limit 1500 characters)

Strategies to increase resources for youth include diverse funding through advocacy at the legislative level to increase RHY and other state and federal funds, membership in Oregon Alliance of Children’s Program (OACP) and Oregon Homeless Youth Advisory Committee, marketing program outcomes with private solicitations, leveraging agency resources with philanthropic funds, and local government support. Strategies are measured using a Permanency Assessment and Youth Connections Survey completed at program entry and exit and outcomes in housing stability with 86% of youth exiting to permanent
housing destinations. The measurements the CoC uses to determine effectiveness is based on the percentage of youth who achieve the following outcomes as a percent of the total youth participant population.

- % of youth participants who exit to permanent housing (housing stability)
- % who increase their permanency resources
- % who save 15 percent of their total income
- % who participate in job readiness services when unemployed or underemployed
- % who increase their life skills and capacity for living independently

Participants’ housing stability reflects the effectiveness of the strategy to prepare for and establish long-term security. Other measurement factors include permanency resources to include the number and quantity of youth relationships, job readiness services to include soft skills that help to maintain employment, and money management to include budgeting and a savings account.

3B-2.8. Describe: (1) How the CoC collaborates with youth education providers, including McKinney-Vento local educational authorities and school districts; (2) the formal partnerships the CoC has with these entities; and (3) the policies and procedures, if any, that have been adopted to inform individuals and families who become homeless of their eligibility for educational services. (limit 1000 characters)

CoC aligns with the Education for Homeless Children and Youth (EHCY) authorized under Title VII-B, reauthorized under the Every Student Succeeds Act (ESSA). Local Education Agencies (LEA) active in the CoC include the Homeless Education Network (HEN) comprised of all 7 school districts and the State Education Agencies (SEA) representing the Family Justice Initiative, Oregon Departments of Education and Human Services. CoC membership includes LEA and SEA, and providers attend monthly HEN meetings to build upon cross-district communications, planning, policy (Community Connect, Section 3.3), and resource development. LEA identify persons eligible for homeless and education services, refer youth and families to the centralized system -Community Connect (CC) - and work with shelter providers to coordinate enrollment in school of origin and transportation. CC and provider job descriptions include EHCY requirements on informing education rights and school liaison contact information.

3B-2.9. Does the CoC have any written formal agreements, MOU/MOAs or partnerships with one or more providers of early childhood services and supports? Select “Yes” or “No”.

<table>
<thead>
<tr>
<th>Provider</th>
<th>MOU/MOA</th>
<th>Other Formal Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early Childhood Providers</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Head Start</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Early Head Start</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Child Care and Development Fund</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Federal Home Visiting Program</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Healthy Start</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

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3B-3.1. Provide the actions the CoC has taken to identify, assess, and refer homeless Veterans who are eligible for Veterans Affairs services and housing to appropriate resources such as HUD-VASH and Supportive Services for Veterans Families (SSVF) program and Grant and Per Diem (GPD).

(limit 1000 characters)

The US Department of Veteran Affairs (VA) established the Community Resource and Referral Center (CRRC) in the City of Portland to identify, assess, and refer veterans experiencing homelessness in the metropolitan area, including Washington County. In addition, the VA operates the 24 hour National Call Center for homeless veterans (877-4AID-VET). Upon contact, the VA will review the veteran’s DD-214 to evaluate their eligibility for appropriate resources such as HUD-VASH, SSVF and GPD programs. Eligible veterans are identified using a By-Name registry and outreach at veteran events; e.g. Stand Down. Assessing the veteran needs for housing occurs through clinical assessment, self-report and walk-in at the CRRC and the CoCs centralized assessment system – Community Connect (CC). Referral to housing programs occurs through the CRRC or CC and case conferencing. Once engaged, the most appropriate referral is made to support the veteran’s long-term stability in permanent housing.

3B-3.2. Does the CoC use an active list or by name list to identify all Veterans experiencing homelessness in the CoC?  Yes

3B-3.3. Is the CoC actively working with the VA and VA-funded programs to achieve the benchmarks and criteria for ending Veteran homelessness?  Yes

3B-3.4. Does the CoC have sufficient resources to ensure each Veteran is assisted to quickly move into permanent housing using a Housing First approach?  Yes
4A. Continuum of Care (CoC) Accessing Mainstream Benefits and Additional Policies

Instructions:
For guidance on completing this application, please reference the FY 2017 CoC Application Detailed Instructions and the FY 2017 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

4A-1. Select from the drop-down (1) each type of healthcare organization the CoC assists program participants with enrolling in health insurance, and (2) if the CoC provides assistance with the effective utilization of Medicaid and other benefits.

<table>
<thead>
<tr>
<th>Type of Health Care</th>
<th>Yes/No</th>
<th>Assist with Utilization of Benefits?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Health Care Benefits (State or Federal benefits, e.g. Medicaid, Indian Health Services)</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Private Insurers:</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Non-Profit, Philanthropic:</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Other: (limit 50 characters)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Virginia Garcia Memorial Health, an FQHC Provider</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

4A-1a. Mainstream Benefits

CoC program funded projects must be able to demonstrate they supplement CoC Program funds from other public and private resources, including: (1) how the CoC works with mainstream programs that assist homeless program participants in applying for and receiving mainstream benefits; (2) how the CoC systematically keeps program staff up-to-date regarding mainstream resources available for homeless program participants (e.g. Food Stamps, SSI, TANF, substance abuse programs); and (3) identify the organization or position that is responsible for overseeing the CoCs strategy for mainstream benefits.

(limit 1000 characters)

The CoC systematically informs program staff on available mainstream benefits through training at monthly CoC meetings and information shared on the CoC listserv; e.g. 9/7/16 the Oregon Department of Human Services (OR-DHS) provided training to CoC members on the General Assistance (GA) Program, 1/4/17 information on the new Hawthorne Mental Health Walk-In Center. Program ASSIST (nonprofit agency) was funded with local CDBG and philanthropic funds to assist homeless adults to apply and access SSI/SSDA benefits. OR-DHS provides regular updates on Food Stamp, TANF, Foster Care, and other program information. The Social Security Administration (SSA) provides annual training to CoC members. Virginia Garcia Memorial Health Care and CareOregon provide assistance in applying for Affordable Care Act (ACA) benefits and health services. Program case workers document
participant access to benefits in HMIS, and the Homeless Program Coordinator is responsible for performance at the system level.

4A-2. Low Barrier: Based on the CoCs FY 2017 new and renewal project applications, what percentage of Permanent Housing (PSH) and Rapid Rehousing (RRH), Transitional Housing (TH), Safe-Haven, and SSO (Supportive Services Only-non-coordinated entry) projects in the CoC are low-barrier?

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of PH (PSH and RRH), TH, Safe-Haven and non-Coordinated Entry SSO project applications in the FY 2017 competition (new and renewal)</td>
<td>7.00</td>
</tr>
<tr>
<td>Total number of PH (PSH and RRH), TH, Safe-Haven and non-Coordinated Entry SSO renewal and new project applications that selected “low barrier” in the FY 2017 competition.</td>
<td>7.00</td>
</tr>
<tr>
<td>Percentage of PH (PSH and RRH), TH, Safe-Haven and non-Coordinated Entry SSO renewal and new project applications in the FY 2017 competition that will be designated as “low barrier”</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

4A-3. Housing First: What percentage of CoC Program Funded PSH, RRH, SSO (non-coordinated entry), safe-haven and Transitional Housing; FY 2017 projects have adopted the Housing First approach, meaning that the project quickly houses clients without preconditions or service participation requirements?

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of PSH, RRH, non-Coordinated Entry SSO, Safe Haven and TH project applications in the FY 2017 competition (new and renewal).</td>
<td>7.00</td>
</tr>
<tr>
<td>Total number of PSH, RRH, non-Coordinated Entry SSO, Safe Haven and TH renewal and new project applications that selected Housing First in the FY 2017 competition.</td>
<td>7.00</td>
</tr>
<tr>
<td>Percentage of PSH, RRH, non-Coordinated Entry SSO, Safe Haven and TH renewal and new project applications in the FY 2017 competition that will be designated as Housing First.</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

4A-4. Street Outreach: Describe (1) the CoC’s outreach and if it covers 100 percent of the CoC’s geographic area; (2) how often street outreach is conducted; and (3) how the CoC has tailored its street outreach to those that are least likely to request assistance. (Limit 1000 characters)

Daily outreach activities are performed primarily Monday through Friday by 5 full-time staff (bi-lingual) that covers 100 percent of the CoC area. The outreach is focused on remote areas and where homeless congregate; e.g. day centers, libraries, soup kitchens, food pantries, campsites, mass-transit/MAX lines, reports by community partners to include law enforcement/fire/EMS, Oregon DOT, Oregon Forestry, METRO Parks & Nature Division, local government, faith-based and private citizens. Partners assist in being the “eyes in remote and rural areas” and relay information on homeless campers to the outreach workers, and in many cases will accompany outreach workers to the site. Approach is tailored to the homeless individual’s needs to include assistance for persons with disabilities and language barriers. Outreach workers are trained in Trauma Informed Care and, upon engagement by the homeless, will perform the Community Connect assessment and referral to housing.

4A-5. Affirmative Outreach
Specific strategies the CoC has implemented that furthers fair housing as detailed in 24 CFR 578.93(c) used to market housing and supportive
services to eligible persons regardless of race, color, national origin, religion, sex, gender identify, sexual orientation, age, familial status, or disability; who are least likely to apply in the absence of special outreach. Describe: (1) the specific strategies that have been implemented that affirmatively further fair housing as detailed in 24 CFR 578.93(c); and (2) what measures have been taken to provide effective communication to persons with disabilities and those with limited English proficiency. (limit 1000 characters)

Washington County (Recipient) monitors fair housing compliance of 24 CFR 578.93c to include program marketing and access to housing and services to prevent discrimination or impediments to equal access as outlined in CoC Program Administration and Monitoring Section 3.2.1 and Appendix B Monitoring Tool, Community Connect Section 9 and Appendix 10.11, and ESG Manual Section 7. Marketing includes Equal Opportunity language on brochures (bi-lingual) and other printed/social media advertising the program. Participants accessing programs receive information on rights and remedies at the Community Connect assessment and at program intake, and can file complaints with the CoC Board. The Recipient will report actions that impede fair housing choice to the Office of Community Development (OCD), the agency certifying consistency with the Consolidation Plan, and provide participants and agencies with information on rights and remedies. OCD provides annual training on Fair Housing.

4A-6. Compare the number of RRH beds available to serve populations from the 2016 and 2017 HIC.

<table>
<thead>
<tr>
<th>RRH beds available to serve all populations in the HIC</th>
<th>2016</th>
<th>2017</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>185</td>
<td>140</td>
<td>-45</td>
</tr>
</tbody>
</table>

4A-7. Are new proposed project applications requesting $200,000 or more in funding for housing rehabilitation or new construction? No

4A-8. Is the CoC requesting to designate one or more SSO or TH projects to serve homeless households with children and youth defined as homeless under other Federal statues who are unstably housed (paragraph 3 of the definition of homeless found at 24 CFR 578.3). No
4B. Attachments

Instructions:

Multiple files may be attached as a single .zip file. For instructions on how to use .zip files, a reference document is available on the e-snaps training site: https://www.hudexchange.info/resource/3118/creating-a-zip-file-and-capturing-a-screenshot-resource

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Required?</th>
<th>Document Description</th>
<th>Date Attached</th>
</tr>
</thead>
<tbody>
<tr>
<td>01. 2016 CoC Consolidated Application: Evidence of the CoC's communication to rejected participants</td>
<td>Yes</td>
<td>Evidence of the C...</td>
<td>09/10/2017</td>
</tr>
<tr>
<td>02. 2016 CoC Consolidated Application: Public Posting Evidence</td>
<td>Yes</td>
<td>CoC Consolidated ...</td>
<td>09/13/2017</td>
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<tr>
<td>03. CoC Rating and Review Procedure (e.g. RFP)</td>
<td>Yes</td>
<td>CoC Rating and Re...</td>
<td>09/13/2017</td>
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<tr>
<td>04. CoC's Rating and Review Procedure: Public Posting Evidence</td>
<td>Yes</td>
<td>CoC Rating and Re...</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>05. CoCs Process for Reallocating</td>
<td>Yes</td>
<td>CoC Reallocation ...</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>06. CoC's Governance Charter</td>
<td>Yes</td>
<td>CoC HMIS Goverana...</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>07. HMIS Policy and Procedures Manual</td>
<td>Yes</td>
<td>HMIS Manual</td>
<td>09/11/2017</td>
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<tr>
<td>08. Applicable Sections of Con Plan to Serving Persons Defined as Homeless Under Other Fed Statutes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09. PHA Administration Plan (Applicable Section(s) Only)</td>
<td>Yes</td>
<td>PHA 022_ACOP and ...</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>10. CoC-HMIS MOU (if referenced in the CoC's Governance Charter)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. CoC Written Standards for Order of Priority</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Project List to Serve Persons Defined as Homeless under Other Federal Statutes (if applicable)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. HDX-system Performance Measures</td>
<td>Yes</td>
<td>HDX OR-506COC Sys...</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>14. Other</td>
<td>No</td>
<td>CoC Governance Po...</td>
<td>09/25/2017</td>
</tr>
<tr>
<td>15. Other</td>
<td>No</td>
<td>OR506-CoC Commun...</td>
<td>09/15/2017</td>
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Attachment Details

Document Description: Evidence of the CoC Communication to Accept or Reject Application

Attachment Details

Document Description: CoC Consolidated Application Public Posting Evidence

Attachment Details

Document Description: CoC Rating and Review_RFP

Attachment Details

Document Description: CoC Rating and Review Process: Public Evidence

Attachment Details

Document Description: CoC Reallocation Process
Document Description: CoC HMIS Governance Policy

Attachment Details

Document Description: HMIS Manual

Attachment Details

Document Description: PHA 022_ACOP and HCV Administrative Plan for Homeless Preference

Attachment Details

Document Description:
Attachment Details

Document Description:

Attachment Details

Document Description: HDX OR-506COC System Performance Measurements

Attachment Details

Document Description: CoC Governance Policy

Attachment Details

Document Description: OR506-CoC Community Connect Policy that includes ESG Manual
Submission Summary

Ensure that the Project Priority List is complete prior to submitting.

<table>
<thead>
<tr>
<th>Page</th>
<th>Last Updated</th>
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<tbody>
<tr>
<td>1A. Identification</td>
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</tr>
<tr>
<td>1B. Engagement</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>1C. Coordination</td>
<td>09/25/2017</td>
</tr>
<tr>
<td>1D. Discharge Planning</td>
<td>08/22/2017</td>
</tr>
<tr>
<td>1E. Project Review</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>1F. Reallocation Supporting Documentation</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>2A. HMIS Implementation</td>
<td>09/13/2017</td>
</tr>
<tr>
<td>2B. PIT Count</td>
<td>08/22/2017</td>
</tr>
<tr>
<td>2C. Sheltered Data - Methods</td>
<td>09/25/2017</td>
</tr>
<tr>
<td>3A. System Performance</td>
<td>09/25/2017</td>
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<tr>
<td>3B. Performance and Strategic Planning</td>
<td>09/25/2017</td>
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<tr>
<td>Section</td>
<td>Date</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------</td>
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<tr>
<td>4A. Mainstream Benefits and Additional Policies</td>
<td>09/25/2017</td>
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<tr>
<td>4B. Attachments</td>
<td>09/15/2017</td>
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<tr>
<td>Submission Summary</td>
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COC PROCESS FOR REALLOCATION

In accordance with the CoC Program Application and Award Process, policy 578.9-OR506CoC, the HSSN Workgroup (the CoC Board) and CoC members at-large met on September 8, 2017 to review new and renewal project applications submitted in response to the Request For Proposals (RFP) published on July 27 by Washington County Department of Housing Services, the CoC Collaborative Applicant.

The CoC utilizes the reallocation process as a mechanism to:
- improve program performance, increase system capacity and/or to prioritize funds to better serve a new or increasing homeless demographics within the jurisdiction; and
- actively encourage new and existing providers to apply for new projects through a reallocation of existing projects; e.g. FY2016 CoC Consolidated Application included the reallocation of $14,772 in transitional housing.

On September 8, the Workgroup determined that no reallocation of funds would occur in the FY2017 CoC Consolidated Application based on:
1. After extensive outreach and public notification on the opportunity to apply for funding, the CoC received one (1) new project application that totaled the value of the permanent housing bonus amount. This leaves the CoC with limited options for developing new projects through reallocation; and
2. The HSSN Workgroup members perform an analysis and agreed with the CoC Program recipient/sub-recipient agencies that current projects are exceeding the minimum threshold in performance and that all program beds are needed to address the housing and service gaps identified by the CoC.

Published in the July 27 RFP was a link to the CoC Program Application and Award Process that outlined the process for reallocation.

Decision:
Consensus of the HSSN Workgroup to not reallocate CoC funding in the FY2017 CoC Program Consolidated Application.

Attachment: CoC Program Application and Award Process
REQUEST FOR PROPOSALS
PERMANENT HOUSING BONUS FUNDS TO CREATE
NEW PERMANENT SUPPORTIVE HOUSING (PSH) SERVING THE CHRONICALLY
HOMELESS AND RAPID REHOUSING (RRH) THAT WILL SERVE INDIVIDUALS AND
FAMILIES COMING DIRECTLY FROM THE STREET OR SHELTER
TO INCLUDE PERSONS FLEEING DOMESTIC VIOLENCE, AND
RENEWAL OF COC PROGRAM FUNDED PROJECTS

OR-506CoC Washington County Annual Renewal Demand (ARD): $3,279,139
New Permanent Housing Bonus: Up to $196,748

This announcement is provided in compliance with 24 CFR 578.9 to design, operate and follow a collaborative process for the
development of applications and approve the submission of the applications in response to a NOFA published by HUD.

July 27, 2017

Washington County, Oregon, serving as the Collaborative Applicant for the local homeless continuum of
care (CoC) planning process under the governance of the Washington County Housing and Supportive
Services Network (HSSN) announced the request for projects and will consider applications from
organizations that have not previously received CoC Program funding to provide housing and services to
include Permanent Supportive Housing (PSH) for chronically homeless individuals and families, and new
Rapid Rehousing (RRH) for individuals and families with children coming directly from the streets or
emergency shelters. New in the FY2017 competition is the DedicatedPLUS, expansion of permanent
housing (PH) projects, and Joint TH and PH-RRH. This RFP serves as official notice for selection of
renewal project applications from organizations receiving CoC Program funds to continue serving
homeless individuals and families. A copy of this Request For Proposals (RFP) with local FY2017 CoC
Program application updates is available online at
http://www.co.washington.or.us/Housing/EndHomelessness/homeless-programs-and-events.cfm.

The HSSN prioritized renewal of CoC Program projects providing housing and services as outlined in A
Road Home: 10-Year Plan to End Homelessness in Washington County and in alignment with Opening
Doors: Federal Strategic Plan to Prevent and End Homelessness, and has determined existing housing,
and HMIS projects that meet performance outcomes will be renewed with current Project Sponsor
Agencies. See Appendix A attached to this notice.

The U.S. Department of Housing and Urban Development (HUD) has prioritized the need to end chronic
homelessness by 2017, and youth and family homelessness by 2020. A new Permanent Housing Bonus
funding competition is available to address these goals. Renewal and new projects must meet the
program priorities, project quality thresholds, and standards set forth in this RFP and in alignment with
the Federal FY2017 CoC NOFA, available online https://www.hudexchange.info/resource/5419/fy-2017-
coc-program-nofa/

Overview:
On July 14, 2017, the U.S. Department of Housing and Urban Development (HUD) announced
approximately $2 billion available in the FY2017 CoC Program Competition to renew high-performing
projects, and the creation of new projects through reallocation and new Permanent Housing Bonus funds.

New PSH or RRH projects must meet the program eligibility and threshold requirements established by
HUD in the NOFA, to include Sections V.G.2.b (page 30), V.G.2.c (page 32) and V.G.2.d (page 35).
Project applications must demonstrate the extent to which the applicant:
(1) Prioritizes Highest Need Populations: Serves chronic homeless and other vulnerable homeless persons as outlined in HUD CPD-16-11, adopted by HSSN on August 3, 2016.

(2) Housing First: The PSH or RRH project follows a Housing First model as defined in Section II.A.4 of the NOFA, and demonstrates experience in operating a Housing First program.

(3) Mainstream Services: The project fully leverages mainstream resources.

(4) Leveraging: The project leverages resources to develop a comprehensive project that will meet the needs of the target population and ensure successful program outcomes. Written statement of cash or in-kind leveraged commitment is required at time of application.

Washington County, acting as the Project Applicant (recipient), will work in partnership with the Project Sponsor Agency (subrecipient) to submit the application as a new project in the CoC Consolidated Application. The Project Sponsor Agency must meet applicant eligibility standards, demonstrate fiscal capacity to administer the project, and statutory deadlines regarding the obligation of grant funds as stated in the HUD Appropriations Act. HUD will review eligibility as part of the threshold review process.

New Permanent Housing Bonus Project:
Total Funds: Up to $196,748 (Budget limits include 7% maximum in Administration that is split 50/50 between Project Sponsor Agency and Washington County).
Funding Match: 25% cash or in-kind, in compliance with CoC Program 24 CFR 578.73.
Term of Project: Minimum term is 1-year. Exception, capital project term is 3-years. Capital projects must meet Section 3 requirements.

CoC Transparent Application Process: Review, Scoring and Selection Timeline:
This RFP outlines the project proposal process as a function of the HSSN (the CoC membership at-large). Applicants are encouraged to review the scoring criteria outlined in 578.9-OR506 CoC Program Application and Award Process available online at
7/27/2017 Public notice of the Request For Proposal (RFP) to the CoC HSSN and public at-large.
8/17/2017 For new Bonus competition, Project Sponsor Agency will schedule project proposal presentation with the CoC HSSN Chair, Annette Evans, at 503-846-4760 or Annette_Evans@co.washington.or.us.
8/23/2017 New and renewal project applications are due by 5 p.m. to the CoC Collaborative Applicant, Attention: Annette Evans.
9/6/2017 CoC HSSN will score new project proposals. Project Sponsor Agency will present to HSSN members (10 minutes with 5 minute questions/answers period), and provide 45 copies of the project proposal – See Appendix B. The proposal will be a summary of the CoC Project Application. Scoring will include One (1) vote per eligible agency or individual.
9/8/2017 HSSN Workgroup (the CoC Board) will review the scores and comments provided by the HSSN membership for final selection and ranking. Project Sponsor Agencies for new and renewal project applications are encouraged to attend this meeting.
9/11/2017 Collaborative Applicant will notify all new and renewal project applicants in writing of the selection or denial of applications for the CoC Consolidated Application.
9/15/2017 Collaborative Applicant will complete CoC Priority Listing in HUD eSNAPS based on the HSSN Workgroup ranking and rating.

National Proposal Review, Scoring and Selection Process:
CoC Program applications will be scored by HUD in accordance with the criteria set forth in the NOFA. It is the project applicant’s responsibility to review the NOFA and submit projects that support the NOFA requirements.
HUD will continue to require CoC’s to rank all new and renewal projects, except CoC Planning, in two funding tiers.

- **Tier 1** is equal to the greater of the combined amount of Annual Renewal Amount (ARA) for all permanent housing and HMIS projects eligible for renewal up to $1,000,000 or 94 percent of the CoC’s FY2017 Annual Renewal Demand (ARD) to include all currently funded HUD CoC Program projects.
  - Tier 1 = $3,082,391 (94% of $3,279,139 ARD)
- **Tier 2** is the difference between Tier 1 and the CoC’s ARD plus any amount available for the permanent housing bonus.
  - Tier 2 = $196,748 (6% of $3,279,139 ARD)
- **Permanent Housing Bonus** to create new projects is up to 6 percent of the CoC’s Final Pro Rata Need (FPRN).
  - Permanent Housing Bonus (new) = $196,748

On May 10, 2017, Washington County submitted to HUD $3,279,139 in Annual Renewal Demand (ARD) for current CoC Program-funded projects as follows:

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>Project Title</th>
<th>Project Sponsor Agency</th>
<th>FY2016 HUD Award (Renewal $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSH</td>
<td>Hillsboro Graduated Independent Living</td>
<td>Luke-Dorf, Inc.</td>
<td>$90,713</td>
</tr>
<tr>
<td>PSH</td>
<td>Shelter Plus Care Renewal (includes consolidation of Tri-Haven)</td>
<td>Washington County Department of Housing Services</td>
<td>$2,246,703</td>
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<tr>
<td>RRH</td>
<td>CoC Rapid Re-Housing for Families</td>
<td>Community Action</td>
<td>$451,196</td>
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<tr>
<td>RRH</td>
<td>Housing Stabilization Program</td>
<td>Good Neighbor Center</td>
<td>$31,618</td>
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<tr>
<td>TH</td>
<td>Transitional Living Program</td>
<td>Boys &amp; Girls Aid</td>
<td>$121,741</td>
</tr>
<tr>
<td>SH</td>
<td>Safe Haven</td>
<td>Luke-Dorf, Inc.</td>
<td>$297,426</td>
</tr>
<tr>
<td>HMIS</td>
<td>Homeless Management Information System</td>
<td>Washington County Department of Housing Services</td>
<td>$39,742</td>
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</table>

**Total Annual Renewal Demand:** $3,279,139

PSH = Permanent Supportive Housing  
RRH = Rapid Re-Housing  
TH = Transitional Housing  
SH = Safe Haven  
HMIS = Homeless Management Information System
[Appendix B]

FY2017 PSH or RRH Bonus Project Proposal to HSSN

(Limit 2 pages)

Project Name

HUD Funds Requested

$ XXX.XX

Legal Applicant Information

Legal Name, Address, Agency Contact Name with email/phone information,

Note: Applicant/Project Sponsor (subrecipient) will need to have Data Universal Numbering System (DUNS), Employer/Taxpayer Identification Number (EIN/TIN), and compliance with Civil Rights Matters, and Certification of Consistency with the Consolidated Plan upon submittal of application.

Experience of Applicant, Sponsor(s) and Other Partners

• Describe the basic organization and management structure. Include evidence of internal and external coordination and an adequate financial accounting system as demonstrated by fiscal audit.
• Describe experience of the applicant, sponsors, and partners, as it relates to working with the target population experiencing homelessness.
• Describe any outstanding monitoring/findings, including Continuum of Care Program and Emergency Solutions Grant (ESG) funds.
• Acquisition/Construction/Rehab Funding Requests – Describe experience to timely construction or rehab projects and compliance with Section3.

Project Description

• Describe scope of the project activities to include: prioritizing how you will serve the highest need chronically homeless or other vulnerable population, the housing first model, and how your program will leverage mainstream resources to address the supportive service needs of the homeless.
• Include total number of units and beds, services provided, etc.
• Describe the estimated schedule for implementing the project activities, the management plan, and the method for assuring effective and timely completion of the project.
• Will participants be required to live in a particular structure, unit or locality – and if yes, explain how and why the project will implement this requirement? Will more than 16 persons with disabilities live in one structure?
• Describe the outreach and referral plan to bring homeless into the project.
• Describe data collection and participation in HMIS.

Project Budget and Funding

• Describe commitment to provide 25 percent cash and/or in-kind match for HUD funds
• Describe leveraging public and private funds to support the total project budget.
• Provide budget by activity component: Acquisition/Construction/Rehabilitation, Leasing, Rent Assistance, Services, Operations, and Administration costs for both HUD and non-HUD funds:

  Note: Total Project Cost = HUD CoC Funds + Matching Funds + Leverage Funds

Performance Measurements

• Describe how the project will demonstrate a reduction in the number of unsheltered chronic homeless persons in Washington County or unsheltered/sheltered youth, individuals or families with children.
• Describe the project’s quantifiable and measurable outcomes in supporting persons to increase housing stability, increased earned income or economic supports, and greater self-sufficiency.
**Policy:** This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN).

**Purpose:** Design, operate and follow a collaborative process for the development of applications and approve the submission of application in response to a NOFA (Notice of Funding Available) published by HUD.

**Standard:** The HSSN is responsible for promoting community-wide commitment to the goal of ending homelessness through strategic planning, system change, program development, and prioritization of funds.

**Scope:** Homeless Provider Agencies, Community Stakeholders, recipient(s) and subrecipient(s) of CoC Program and Emergency Solution Grant (ESG) funds, the HMIS Lead, and the CoC Collaborative Applicant.

**Authority For Code:** Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act CoC Program regulatory statutes 24 CFR parts 578.9, 578.11, 578.13, 578.15, 578.17, 578.19, 578.21 and other such parts as applicable.

**Responsibilities:**

1. **HOUSING AND SUPPORTIVE SERVICES NETWORK (HSSN) – THE COC**
   
   As outlined in the CoC Governance, the HSSN is to provide a coordinated and comprehensive community planning process to implement a Continuum of Care (CoC) for individuals and families who are at risk or experiencing homelessness and to prevent a return to homelessness. Refer to CoC Governance policy 578.5-OR506CoC.

   A role administered by the HSSN is the preparing the McKinney-Vento Homeless Assistance grant application on behalf of OR-506 CoC Hillsboro/Beaverton/Washington County, Oregon. This policy outlines the process and criteria in ranking and rating renewal and new project applications requesting funds under the CoC Program 24 CFR Part 578.

2. **PREPARING THE COC PROGRAM GRANT APPLICATION**

   **HSSN (the CoC)**

   The HSSN is charged with design, operation and following a collaborative process for the development of applications and approve the submission of applications in response to a NOFA published by HUD under part 578.19.
HSSN will establish priorities for funding projects in the geographic area of OR-506 CoC.

The HSSN will elect a CoC Collaborative Applicant that will collect and combine the required application information from all applicants and for all projects within the geographic area that the CoC has selected funding. The CoC Collaborative Applicant will also apply for CoC Planning activities.

3. REQUEST FOR PROPOSAL AND RECORDKEEPING

CoC Collaborative Applicant
Elected by the HSSN, the CoC Collaborative Applicant will provide administrative support in coordinating and submitting the application, to include preparing the CoCs funding availability through Annual Renewal Demand (ARD) approved by HUD, reallocation of CoC Program-funded projects, and new CoC Program funds made available by HUD.

The CoC Collaborative Applicant will prepare and publish a Request For Proposal (RFP) with timeline for project proposal presentations, due date of applications, the date of the ranking/rating based on performance outcomes of HUD-Funded OR-506 CoC Programs (see Appendix A, Measuring Performance of HUD-funded CoC Program) and scoring by HSSN for new projects. The RFP will be a public announcement using email, bulletin boards, community forums, and posted on the jurisdiction’s website.

The CoC Collaborative Applicant will schedule presentations of all new projects at the next regular HSSN meeting following the Notice of Funding Available (NOFA) release by HUD, with each agency having one vote (see Appendix B, Project Evaluation Criteria). The CoC Collaborative Applicant will document the ranking and rating process of renewal and new project proposals, and submit the Project Priority List in the CoC Consolidated Application upon approval by the HSSN Workgroup. The HSSN Workgroup will review a summary sheet of the new project scores by agency for each project, and have the opportunity to review the individual detailed score sheets to validate the summary of scores.

Records supporting the grant application process will be retained for five (5) years following the HUD grant award announcement, and will include a summary of new project proposal scores, the Measuring Performance of HUD-funded CoC Programs, rank/rating results, letters or other communication regarding acceptance or rejection of project applications, project applications, and other CoC Program grant application.

4. RENEWAL PROJECT RANKING AND RATING PROCESS

HSSN Workgroup (the CoC Board)
The Workgroup is the administrative body of the HSSN, and responsible for:

a) Review Annual Performance Reports (APR) outcomes for all CoC Program projects;
b) Establish priorities for funding projects in alignment with the HSSN review of latest PIT/HIC reporting on homeless demographics and gaps in housing resources;
c) Review projects with non-compliance and/or outstanding on-site monitoring issues and consider reallocation of project funds (see Section 5);

d) Rate project performance using standard performance criterion to include:
   i. 10 points - Housing First (low-barrier access model)
   ii. 3 to 16 points - Target Population
   iii. 8 points – Exits to Permanent Housing
   iv. 4 points – Increase Earned Income from Entry to Annual Assessment/Exit
   v. 4 points – Increase Cash Income from Entry to Annual Assessment/Exit
   vi. 8 points – Maintain or Increase Non-Cash Income
   vii. 5 points – Bed Occupancy on PIT Date
   viii. 5 points – De-obligation of HUD Funds
   ix. Compliance/On-Site Monitoring Outcomes (Pass if all issues addressed/Fail if outstanding compliance issues)
   x. Commitment of Leverage Dollars (excludes 25% cash or in-kind match)

e) Rank projects in order of highest priority for funding being #1 with the lowest priority for funding being the last number in the CoC Program Project Priority List; and

f) Approve the final projects applications for submittal in the CoC Consolidated Plan.

For template of the rating matrix, see Appendix A, Measuring Performance of HUD-Funded OR-506 CoC Programs

5. REALLOCATION PROCESS

HSSN Workgroup (the CoC Board)

Reallocation is the process the CoC uses to shift funds in whole or part from existing eligible renewal projects to create one or more new projects within the CoC annual renewal demand for CoC Program funds. Existing providers are encouraged to apply for new projects through reallocation of their existing projects.

During the comprehensive review of renewal projects, the HSSN Workgroup will use the scoring criteria and selection priorities to determine the extent to which each project is still necessary and address priorities based on System Performance Measurement (SPM) outcomes, gaps analysis and homeless demographic data collected during point-in-time and Community Connect; e.g. ending chronic homelessness, veteran, youth, families with children. The HSSN Workgroup will reallocate funds to new projects whenever reallocations would reduce homelessness or address an underserved homeless population.

To minimize the risk of homeless participant displacement as a result of reallocation, the HSSN Workgroup will approach the reallocation decision as follows:

Current Notice of Funding Available (NOFA)

Determine immediate (current NOFA) reallocation at current grant term ending through reallocation of funds to new project as follows:

a) Project has unresolved on-site monitoring or financial issues outlined in Section 4.c;
b) Project is extreme low performer with points at or below 50 percent of the scoring criteria defined in Section 4.d;

c) Participants can be served by another program within the CoC so as not to create a displacement of program participants; and

d) Project does not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ or the Declaration has expired (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

Note: If a ‘Declaration of Restrictive Covenant’ remains valid and the HSSN Workgroup chooses to reallocate the funds, the Recipient will work with the project sponsor agency (subrecipient) and HUD to determine next steps.

Future NOFA

Determine reallocation need and provide written notice to the project sponsor agency that the program will not be considered for renewal in a future CoC Program funding cycle – provide specific funding cycle that the funds will be reallocated. The HSSN Workgroup will approach the reallocation decision as follows:

e) Project has unresolved on-site monitoring issues – excluding financial issues - outlined in Section 4.c that would not prohibit the project from fully serving the participants;

f) Project is low performer with points at or below 55 percent of the scoring criteria defined in Section 4.d;

g) Project does not serve a priority population and the population may be better served by other community resources;

h) Project sponsor organization needs one additional year to effectively transition participants to new housing and services to minimize displacement of participants; and

i) Project may or may not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ that has not yet expired, and the project sponsor organization needs time to secure alternate financing to ensure compliance (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

6. NEW PROJECT RANKING AND RATING PROCESS

HSSN (the CoC)

The HSSN membership will receive presentations on new project proposals with eligible voting members completing the scoring process using the procedure and written standards outlined in Project Evaluation Criteria (Appendix B).

a) Rate project performance using standard performance criterion to include:

i. 20 points – Critical CoC Project Components; e.g. housing emphasis, capacity to develop and implement the project

ii. 8 points – Supports the 10-Year Plan and Consolidated Plan

iii. 12 points – Effectiveness of the Project

iv. 10 points – Resource Utilization

v. 5 points – Aligns with Local CoC and HUD Priorities

HSSN Workgroup (the CoC Board)
The Workgroup is the administrative body of the HSSN, and responsible for:

b) Review the project proposal scores from the HSSN membership;

c) Address any concerns raised by HSSN membership through a review with the project sponsor agency to include commitment and capacity to implement the program and serve the target population;

d) Rank projects in order of highest priority for funding being #1 with the lowest priority for funding being the last number in the CoC Program Project Priority List; and

e) Approve the final projects applications for submittal in the CoC Consolidated Application.

7. APPEAL PROCESS

The project sponsor agency (recipient/subrecipient) may appeal the HSSN Workgroup decision for renewal reallocation and/or new project selection as follows:

a) The project sponsor agency will submit a written appeal of the decision to the CoC Collaborative Applicant and the Chair of the HSSN Workgroup.

b) The Chair will convene the HSSN Workgroup (the local CoC Board) to receive and review the appeal statement.

c) The project sponsor agency will attend the meeting to answer questions the HSSN Workgroup may have in reviewing the appeal filed by the project sponsor agency.

d) The HSSN Workgroup will make a decision that will be recorded in minutes, and the CoC Collaborative Applicant will proceed with filing the CoC Program application in accordance with this policy and the determination of the HSSN Workgroup. Should the project sponsor agency seek to appeal the decision to a higher authority, the CoC membership will hear the matter at the next monthly meeting of the Washington County Housing and Supportive Services Network (HSSN).

The HSSN Workgroup’s decision to make reallocation decisions to be implemented in “future NOFA” cycles will minimize displacement and support the transition of homeless participants as well as reduce the need for appeal hearings during a very tight application submittal timeframe.

8. CODE OF CONDUCT AND RECUSAL PROCESS

The implementation of a Code of Conduct for the HSSN, inclusive of the Chair, Co-Chair, Workgroup, and associated Subcommittees, is an essential element that supports the inclusive, collaborative, and objective goals of the HSSN. [CoC Program 24 CFR 578.95]

1. Meetings will be open to the public.

2. Members will provide information that is truthful and accurate.

3. Members will be respectful to others at all times.

4. Decision making process will:

   a. Be made by consensus at scheduled meetings.
   
   b. For non-funding decisions, all members present will have an option to participate in the voting, e.g. – selection of chair, co-chair, or other general membership decisions.
   
   c. For decisions involving funding, one vote per member organization and one vote per community at-large member based on a threshold of attendance (see Appendix B).
CoC PROGRAM APPLICATION AND AWARD PROCESS

d. **Conflict of Interest.** Members will withdraw/excuse themselves from participating in decision-making (voting) process concerning awards of grants or provisions of financial benefit to which such member or his/her organization could have a future.

9. **GRANT AWARD PROCESS**
CoC Collaborative Applicant
Upon HUD award announcement, the CoC Collaborative Applicant will notify selected applicants of the pending award, to include notice of any conditions imposed on awards by HUD.

HUD will issue grant agreements in accordance with 24 CFR part 578.23, at which time the CoC Collaborative Applicant will prepare Grant Agreements with project subrecipient for activities administered by the subrecipient.

10. **REVISION HISTORY**

<table>
<thead>
<tr>
<th>Version/Date</th>
<th>Description of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>V0.2013</td>
<td>Original Version</td>
</tr>
<tr>
<td>V1. December 12, 2014</td>
<td>Section 4 include new criteria and scoring for renewal projects.</td>
</tr>
<tr>
<td>V2. June 9, 2017</td>
<td>Section 5 updates recordkeeping to include record retention.</td>
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</table>

APPENDICES
Appendix A: Measuring Performance of HUD-Funded CoC Programs
Appendix B: Project Evaluation Criteria.
### APPENDIX A

Measuring Performance of HUD-Funded CoC Programs

<table>
<thead>
<tr>
<th>POINTS TOTAL</th>
<th>OUTCOME</th>
<th>POINT VALUE</th>
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<tbody>
<tr>
<td>10</td>
<td>Project follows Housing First Model</td>
<td>Yes = 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Partial = 5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No = 0</td>
</tr>
<tr>
<td>16</td>
<td>Target Population - Severity of Need and Vulnerability</td>
<td>Chronically Homeless = 16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Veteran Homeless = 16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Domestic Violence/Human Trafficking = 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Criminal History = 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Active or history of substance abuse = 13</td>
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<tr>
<td></td>
<td></td>
<td>Mod-BARRIER (RRH/TH) = 10</td>
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<tr>
<td></td>
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<td>Low-BARRIER (RRH/TH) = 5</td>
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<td>8</td>
<td>Exits to Permanent Housing (Goal: 80%)</td>
<td>80% = 0</td>
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<tr>
<td></td>
<td></td>
<td>60% to 79% = 6</td>
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<td></td>
<td></td>
<td>45% to 59% = 4</td>
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<td></td>
<td></td>
<td>30% to 44% = 2</td>
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<td></td>
<td></td>
<td>&lt;29% = 0</td>
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<tr>
<td>4</td>
<td>Gain or increase Earned Income (Goal: 20%)</td>
<td>21% = 4</td>
</tr>
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<td></td>
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<td>16% to 20% = 3</td>
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<td>11% to 15% = 2</td>
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<td>4</td>
<td>Gain or increase Cash Income (Goal: 54%)</td>
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<td>&lt;6% to 20% = 1</td>
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<td></td>
<td></td>
<td>&lt;3% = 0</td>
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<td>8</td>
<td>Increase Non-Cash Income (Goal: 54%)</td>
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<tr>
<td></td>
<td></td>
<td>&lt;3% = 0</td>
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<tr>
<td>5</td>
<td>PIT Bed Occupancy (Goal: 80%)</td>
<td>60% = 5</td>
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<tr>
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<td></td>
<td>61% to 79% = 4</td>
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<td>46% to 60% = 3</td>
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<td>16% to 30% = 1</td>
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<td></td>
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<td>&lt;15% = 0</td>
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<tr>
<td>5</td>
<td>De-Obligation of HUD Funds (Goal: &lt;%)</td>
<td>&lt;1% = 5</td>
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<tr>
<td></td>
<td></td>
<td>1% to 1.49% = 3</td>
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<tr>
<td></td>
<td></td>
<td>1.5% to 1.99% = 1</td>
</tr>
<tr>
<td></td>
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<td>&gt;2% = 0</td>
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### Tiebreakers for Ranking and Ratings

- On-Site Monitoring Compliance and Fiscal Audit (to include Super Circular 2 CFR 200)
- Commitment of Leverage $ (excludes cash and in-kind match $)
- Data Quality: Timeliness in entering Data at Exit
## APPENDIX A

### PY20XX CoC Program Grant Competition – $XXXXX

<table>
<thead>
<tr>
<th>Tier 1 &amp; Tier 2 in Priority Order</th>
<th>CoC Program Project Title</th>
<th>Need Funding Request (approved GFA)</th>
<th>Total Points</th>
<th>% Adult Inc Likely to Annual Assessment</th>
<th>% Adult Inc Likely to Annual Assessment</th>
<th>% Increase Over CDBG</th>
<th>% Bed Utilization 500/200X</th>
<th>HUD Spec</th>
<th>Cumulative Leverage 1 (Excludes 25% Match)</th>
<th>Cash Quality: Timeliness (0-100 Points)</th>
<th>Total Project Points (10 points)</th>
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</table>

**Tier 1 Request:** $________

**Tier 2 Request:** $________

**Note:** PY-005 CoC - Matching Not a Failsafe and Priorit Project.

**Total Grant Request:** $________
### APPENDIX B

**Scoring Agency:** (Enter agency name based on attendance at CoC Meetings)

| Project Name: | = |
| Project Sponsor: | = |
| Date Presented to HSSN: | = |

Projects proposed for funding under the Washington County Continuum of Care will be evaluated utilizing the following criteria:

#### A. Critical Continuum of Care (CoC) Project Components (0-5 points each) [Max 20 Pts]

1. The project generates housing emphasis points for the CoC through more than 75% of the budget dedicated to acquisition, construction, rehabilitation, leasing, or rent assistance activities.
2. The applicant or sponsor demonstrates rapid implementation of the project and capacity to deliver the proposed services to the target population(s).
3. The project sponsor is fiscally capable to administer the grant and has no outstanding audit findings or financial management recommendations.

#### B. How project relates to 10-Year, the CoC & Consolidated Plans (0-2 points each) [Max 8 Pts]

1. The activity is identified in the Continuum of Care 10-Year Plan and Consolidated Plan.
2. The needs of the target population are clearly identified and substantiated.
3. The activity supports the CoC goal to end chronic homelessness.
4. The activity project uses a low-barrier “housing first” model for rapid placement into housing.

#### C. Effectiveness (0-2 points each) [Max 12 Pts]

1. Project accepts 100% referrals from Community Connect, a centralized entry system.
2. Participants will be helped to achieve self-sufficiency through employment linkage and access to mainstream resources.
3. The project promotes participant choice and interventions are tailored to meet the needs of all members of the household.
4. Program participant satisfaction will be collected and used to improve the program.
5. Participant data will be collected in HMIS.
6. If the project serves homeless families with children, the project sponsor has established policies and designated staff that ensure all children are enrolled in school.

#### D. Resource Utilization (0-2 points each) [Max 10 Pts]

1. The applicant clearly identifies the activities for which McKinney-Vento funds will be used.
2. The project has direct linkages with other mainstream resources and service programs within the system.
3. The project utilizes existing services or complements other program efforts as demonstrated in collaborative partnership(s) with other agencies.
4. Other potential secured funding sources are identified and described.
5. The project attracts private funding.

#### E. BONUS: The project aligns with Local CoC and HUD priorities, as established in the Request For Proposal (RFP). [5 Max Pts]

**PRIORITY:** Permanent Supportive Housing for Chronic Homeless and Permanent Housing (Rapid Re-Housing) for Individuals and Families coming directly from street or shelter, to include persons fleeing Domestic Violence (Category 4 Homeless Definition).

**Total Points:** [ ]

**Total maximum points possible:** 55
APPENDIX B

PARTICIPANT VOTING PROCESS:

1. Housing and Supportive Services Network (HSSN) membership is open to any person interested in the issue of homelessness in Washington County.

2. All new and renewal projects are brought before the HSSN for review and prioritization.

3. Project sponsors requesting Continuum of Care funds provide a presentation to the HSSN in accordance with the HSSN Continuum of Care Planning Calendar and will format their presentation according to the Request For Proposal (RFP) standard rating criteria used by the HSSN.

4. HSSN members rate each project using the criteria point system, casting a vote (points) for each project. This evaluation criteria form was reviewed and approved for use by the HSSN in November 7, 2012 (originated January 2006).

5. The voting process (rating and prioritizing of projects) is the work of the HSSN while in attendance at a regular HSSN meeting.

6. Any agency or individual with a conflict of interest will abstain from voting.

7. This open process ensures that the objective rating and prioritizing system is fair, honest, inclusive, and unbiased. The Participant Voting Process and the Voting System is designed to create an open process within the Washington County HSSN.

VOTING SYSTEM:

1. Adoption of this project evaluation criteria voting system was implemented with the participation and consensus of HSSN members.

2. All agencies/groups/individuals are allowed to vote after attending a minimum of 8 meetings in a 12-month period (July to June).

3. Only one (1) vote per agency/group. Individuals not associated with an agency or group will have one (1) vote each.

4. A HSSN Work Group meeting is scheduled, at which time the HSSN Work Group tallies the votes and ranks the project on the Project Priorities Chart based on its score and alignment with the goals and strategies outlined in the Federal Strategic Plan “Opening Doors” and the Washington County local 10-Year Plan to End Homelessness “A Road Home.” Project Sponsors are invited and encouraged to attend this meeting.

NOTE:

Final project priority selection will be performed by the HSSN Workgroup (the CoC Board). The project proposal applications will be reviewed to include the scores and comments received on new project proposals. The HSSN Workgroup will complete the rating and selection process for projects moving forward in the competition, and rank projects in priority order.

See CoC Program Application and Award Process, policy # 578.9-OR506CoC for additional details available online at www.co.washington.or.us/homeless.
CoC COMMUNICATION TO REJECTED AND ACCEPTED PROJECT APPLICANTS
AT LEAST 15 DAYS PRIOR TO APPLICATION DEADLINE

The attached email communications were sent on September 10 to notify project applicants that their project application(s) were either accepted or rejected. This required was sent more than 18 days prior to the grant deadline of September 28, 2017.

In summary, communication that:

- Nine (9) project applications were accepted
- zero (0) project applications were rejected
- zero (0) project applications were reduced

Note: The CoC Project Priority Listing was updated in e-snaps and then posted online to be available to both the HSSN at-large membership for review, as well as the project applicants.

Attachments:

a) 9/10/17 Proof of notification (email) to the HSSN (the CoC at-large members)
b) 9/10/17 Proof of notification (email) to the CoC Project Applicants
To: HSSN (The OR-506 CoC General Membership)

This notice is provided in compliance with the FY2017 CoC Program NOFA requirement to provide evidence of the CoC’s communication for rejected project applications, and will be uploaded into the FY2017 CoC Program Consolidated Application as proof of notification to the CoC and the project sponsor agencies.

This communication confirms project application status for inclusion in the FY2017 CoC Program Consolidated Application that will be submitted to the U.S. Department of Housing and Urban Development in response to the Request For Proposals (RFP) that was publicly announced on July 27 by Washington County Department of Housing Services, the CoC Collaborative Applicant. The RFP was communicated through a broad array of media to include email listserv, Facebook, Twitter, and public bulletin board postings that resulted in nine (9) project application submittals to include one (1) new rapid re-housing project, and eight (8) renewal projects providing transitional and permanent housing, HMIS and CoC Planning.

All 9 applications were reviewed, ranked and rated using a public process performed by the HSSN Workgroup (the CoC Board) on September 8, 2017. The rank and rate meeting date and policy was announced in the RFP, and members of the public were present to observe the discussion and decisions that resulted in the following project applications accepted and rejected and ranking process.

Rejected Applications: None

Accepted Applications: Projects 1 through 9 listed below
1. Transitional Living Program sponsored by Boys & Girls Aid
2. CoC Rapid Re-Housing for Families sponsored by Community Action Organization
3. Housing Stabilization Program sponsored by Good Neighbor Center
6. Homeless Management Information System sponsored by Washington County Department of Housing Services
7. Shelter Plus Care Renewal sponsored by Washington County Department of Housing Services
8. RISE: Re-Housing In Support of Employment sponsored by Community Action Organization (NEW PROJECT)
9. OR-506 CoC Planning FY2017 sponsored by Washington County Department of Housing Services, the CoC Collaborative Applicant (NEW PROJECT)

Reallocation of Funds: Zero funds reallocated.

Seven renewal CoC Program-funded projects were reviewed and met the CoCs performance
requirement threshold and need for serving priority populations. Discussion regarding performance outcomes occurred and recommendations on areas project sponsor agencies could improve outcomes in earned income and housing stability.

A copy of the CoC Project Performance and Scoring results for ranking and rating, the CoC Program Consolidated Application and the approved Priority Project Listing are available online at http://www.co.washington.or.us/Housing/EndHomelessness/homeless-programs-and-events.cfm.

Attachment:

1) CoC Performance Ranking and Rating of CoC-funded Projects (also available at the link provided above)

Annette M. Evans
Homeless Program Coordinator
Chair, Housing and Supportive Services Network (HSSN)
Federal Continuum of Care (CoC) # OR-506CoC
Washington County Department of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63, Hillsboro, OR 97124-3082
☎ Phone: 503-846-4760, ☎ Mobile: 503-449-3684, ☎ Fax: 503-846-4795
http://www.co.washington.or.us/Homeless

Collaboration + Partnerships = Achieving our vision in A Road Home through strategic investments!

To help ensure equal access to Washington County Department of Housing Services programs, we will provide translation, reasonably modify policies or procedures and provide auxiliary aids/services/alternative formats to persons with disabilities.
For TTY relay dial 711 or 1-800-735-1232. Para traducción en español marque 1-800-735-3896.
To: CoC Program Project Applicants

> This notice is provided in compliance with the FY2017 CoC Program NOFA (1E-5) requirement to notify all project applicants in writing of their application status at least 15 days prior to the September 28 HUD deadline.

On September 8, 2017, the HSSN Workgroup (the CoC Board) met with public to complete the rank and rate process of all nine (9) project applications that are ranked on the CoC Priority Listing in e-snaps (HUD application software database). The CoC Priority Listing is available online at http://www.co.washington.or.us/Housing/EndHomelessness/upload/CoC-Consolidated-Application_Priority-Listing-and-Ranking.pdf. This communication is being sent to Project Applicants, and a broader and more inclusive email will be sent to the HSSN at-large membership to advise of the ranking and rating process outcomes.

This notice is to advise that your project has been accepted and that no project applications have been rejected. The project applications included in the HUD e-snaps FY2017 CoC Consolidated Application and the CoC Priority Listing are available online (see previous link) and ranked in order as follows:

1. Transitional Living Program sponsored by Boys & Girls Aid
2. CoC Rapid Re-Housing for Families sponsored by Community Action Organization
3. Housing Stabilization Program sponsored by Good Neighbor Center
6. Homeless Management Information System sponsored by Washington County Department of Housing Services
7. Shelter Plus Care Renewal sponsored by Washington County Department of Housing Services
8. RISE: Re-Housing In Support of Employment sponsored by Community Action Organization (NEW PROJECT)
9. OR-506 CoC Planning FY2017 sponsored by Washington County Department of Housing Services, the CoC Collaborative Applicant (NEW PROJECT)

Projects 1 through 7 are in Tier 1 funding, with the Shelter Plus Care Renewal straddling the Tier 1/Tier 2 funding line. See the Priority Listing for further details. If you disagree with the above ranking and rating outcomes, please feel free to contact me.

Thank you for submitting your project applications in a timely manner.

Annette M. Evans
Homeless Program Coordinator
Collaboration + Partnerships = Achieving our vision in A Road Home through strategic investments!

To help ensure equal access to Washington County Department of Housing Services programs, we will provide translation, reasonably modify policies or procedures and provide auxiliary aids/services/alternative formats to persons with disabilities. For TTY relay dial 711 or 1-800-735-1232. Para traducción en español marque 1-800-735-3896.
September 13, 2017

FY2017 CoC Program Consolidated Application – OR506 CoC.

Application Attachment: CoC Consolidated Application: Public Posting

EVIDENCE OF PUBLIC POSTING:
CONSOLIDATED APPLICANT AND PROJECT PRIORITY LISTING

On September 13, the CoC Collaborative Applicant posted the final CoC Consolidated Application and the CoC Project Priority Listing on the jurisdictions website. This is an update to previous application and listings posted to website during the application development process and included project ranking, the location where documents may be reviewed and the timeline for responding with questions or comments.

The email communication was sent to the jurisdiction’s project applicants, community members and key stakeholders using the HSSN listserv (nearly 500 contacts), and included the previously email RFP email and the Reminder of Timeline email to demonstrate transparency and historical communication on the application process.

Attachment: September 13 email for CoC Consolidated Application Submittal Process
Update on the Federal FY2017 CoC Program Grant Application.

The final FY2017 CoC Program Grant Application is available online at http://www.co.washington.or.us/Housing/EndHomelessness/upload/OR-506CoC-FY2017-CoC-Program-Application.pdf and the FY2017 CoC Program Project Priority Listing is available online at http://www.co.washington.or.us/Housing/EndHomelessness/upload/CoC-Consolidated-Application_Priority-Listing-and-Ranking.pdf. Nine (9) projects will seek $3,574,261 in Federal CoC Program funds to provide housing and services to homeless individuals and families in Washington County. Please refer to the website links published in the July 27 email (see below) for additional documentation for public review of the final FY2017 CoC Consolidated Application and associated documents.

If you have questions or comments, please submit in writing no later than September 18 to Annette_Evans@co.washington.or.us.

On September 19, 2017 the Washington County Board of Commissioners (BCC) will review the FY2017 CoC Consolidated Application. This process provides elected officials and the public at-large to review the work of the CoC stakeholders, the impact that Federal funding provides to addressing the needs of our homeless residents, and to provide comment on the application prior to submittal to HUD. The BCC docket is available online at http://www.co.washington.or.us/BOC/Meetings/upload/_Board-Agenda-09-19-2017.pdf.

A note of thanks to all who involved in preparing the application to include presenting project proposals, and ranking and rating of new and renewal projects.

Annette M. Evans
Homeless Program Coordinator
Chair, Housing and Supportive Services Network (HSSN)
Federal Continuum of Care (CoC) # OR-506CoC
Washington County Department of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63, Hillsboro, OR 97124-3082
☎Phone: 503-846-4760, ☏Mobile: 503-449-3684, ☎Fax: 503-846-4795
http://www.co.washington.or.us/Homeless
Collaboration + Partnerships = Achieving our vision in A Road Home through strategic investments!
To help ensure equal access to Washington County Department of Housing Services programs, we will provide translation, reasonably modify policies or procedures and provide auxiliary aids/services/alternative formats to persons with disabilities. For TTY relay dial 711 or 1-800-735-1232. Para traducción en español marque 1-800-735-3896.
Reminder Notice: 8/17/17 is the deadline to submit intent to apply for funds under the FY2017 CoC Program grant competition, with project applications due 8/23/17. See July 27th notice published below for details, and feel free to contact me if you have questions. My office number is 503-846-4760 and email Annette_Evans@co.washington.or.us.

From: Annette Evans
Sent: Thursday, July 27, 2017 3:15 PM
Subject: HSSN_Request For Proposals (RFP) for CoC Program "Permanent Housing Bonus" Funds and Notice for "Renewal of CoC Program Funded Projects"

FEDERAL FY2017 CoC PROGRAM NOTICE OF FUNDING AVAILABLE (NOFA)
HUD Docket No. FR-6100-N-25, CFDA No. 14.267

REQUEST FOR PROPOSALS
PERMANENT HOUSING BONUS FUNDS TO CREATE
NEW PERMANENT SUPPORTIVE HOUSING (PSH) SERVING THE CHRONICALLY HOMELESS AND
RAPID REHOUSING (RRH) THAT WILL SERVE INDIVIDUALS AND FAMILIES COMING DIRECTLY FROM THE STREET OR SHELTER TO INCLUDE PERSONS FLEEING DOMESTIC VIOLENCE, AND RENEWAL OF COC PROGRAM FUNDED PROJECTS

OR-506CoC Washington County Annual Renewal Demand (ARD): $3,279,139
New Permanent Housing Bonus: Up to $196,748

This announcement is provided in compliance with 24 CFR 578.9 to design, operate and follow a collaborative process for the development of applications and approve the submission of the applications in response to a NOFA published by HUD.

July 27, 2017

Washington County, Oregon, serving as the Collaborative Applicant for the local homeless continuum of care (CoC) planning process under the governance of the Washington County Housing and Supportive Services Network (HSSN) announced the request for projects and will consider applications from organizations that have not previously received CoC Program funding to provide housing and services to include new Permanent Supportive Housing (PSH) for chronically homeless individuals and families, and new Rapid Rehousing (RRH) for individuals and families with children coming directly from the streets or emergency shelters. New in the FY2017 competition is the DedicatedPLUS, expansion of permanent housing (PH) projects, and Joint TH and PH-RRH. This RFP serves as official notice for selection of renewal project applications from organizations receiving CoC Program funds to continue serving homeless individuals and families. A copy of this Request For Proposals (RFP) with local FY2017 CoC Program application updates is available online at http://www.co.washington.or.us/Housing/EndHomelessness/homeless-program-and-events.cfm.

The HSSN prioritized renewal of CoC Program projects providing housing and services as outlined in A Road Home: 10-Year Plan to End Homelessness in Washington County and in alignment with Opening Doors: Federal Strategic Plan to Prevent and End Homelessness, and has determined existing housing, and HMIS projects that meet performance outcomes will be renewed with current
The U.S. Department of Housing and Urban Development (HUD) has prioritized the need to end chronic homelessness by 2017, and youth and family homelessness by 2020. A new Permanent Housing Bonus funding competition is available to address these goals. Renewal and new projects must meet the program priorities, project quality thresholds, and standards set forth in this RFP and in alignment with the Federal FY2017 CoC NOFA, available online https://www.hudexchange.info/resource/5419/fy-2017-coc-program-nofa/

Overview:
On July 14, 2017, the U.S. Department of Housing and Urban Development (HUD) announced approximately $2 billion available in the FY2017 CoC Program Competition to renew high-performing projects, and the creation of new projects through reallocation and new Permanent Housing Bonus funds.

New PSH or RRH projects must meet the program eligibility and threshold requirements established by HUD in the NOFA, to include Sections V.G.2.b (page 30), V.G.2.c (page 32) and V.G.2.d (page 35). Project applications must demonstrate the extent to which the applicant:

2. Housing First: The PSH or RRH project follows a Housing First model as defined in Section II.A.4 of the NOFA, and demonstrates experience in operating a Housing First program.
3. Mainstream Services: The project fully leverages mainstream resources.
4. Leveraging: The project leverages resources to develop a comprehensive project that will meet the needs of the target population and ensure successful program outcomes. Written statement of cash or in-kind leveraged commitment is required at time of application.

Washington County, acting as the Project Applicant (recipient), will work in partnership with the Project Sponsor Agency (subrecipient) to submit the application as a new project in the CoC Consolidated Application. The Project Sponsor Agency must meet applicant eligibility standards, demonstrate fiscal capacity to administer the project, and statutory deadlines regarding the obligation of grant funds as stated in the HUD Appropriations Act. HUD will review eligibility as part of the threshold review process.

New Permanent Housing Bonus Project:
Total Funds: Up to $196,748 (Budget limits include 7% maximum in Administration that is split 50/50 between Project Sponsor Agency and Washington County).
Funding Match: 25% cash or in-kind, in compliance with CoC Program 24 CFR 578.73.
Term of Project: Minimum term is 1-year. Exception, capital project term is 3-years. Capital projects must meet Section 3 requirements.

CoC Transparent Application Process: Review, Scoring and Selection Timeline:
This RFP outlines the project proposal process as a function of the HSSN (the CoC membership at-large). Applicants are encouraged to review the scoring criteria outlined in 578.9-OR506 CoC Program Application and Award Process available online at http://www.co.washington.or.us/Housing/EndHomelessness/upload/578-9-CoC-Application-and-Award-Policy-2.pdf

7/27/2017 Public notice of the Request For Proposal (RFP) to the CoC HSSN and public at-large.
8/17/2017 For new Bonus competition, Project Sponsor Agency will schedule project proposal presentation with the CoC HSSN Chair, Annette Evans, at 503-846-4760 or Annette_Evans@co.washington.or.us.
8/23/2017 New and renewal project applications are due by 5 p.m. to the CoC
Collaborative Applicant, Attention: Annette Evans.

9/6/2017  CoC HSSN will score new project proposals. Project Sponsor Agency will present to HSSN members (10 minutes with 5 minute questions/answers period), and provide 45 copies of the project proposal – See Appendix B. The proposal will be a summary of the CoC Project Application. Scoring will include One (1) vote per eligible agency or individual.

9/8/2017  HSSN Workgroup (the CoC Board) will review the scores and comments provided by the HSSN membership for final selection and ranking. Project Sponsor Agencies for new and renewal project applications are encouraged to attend this meeting.

9/11/2017  Collaborative Applicant will notify all new and renewal project applicants in writing of the selection or denial of applications for the CoC Consolidated Application.

9/15/2017  Collaborative Applicant will complete CoC Priority Listing in HUD eSNAPS based on the HSSN Workgroup ranking and rating.


National Proposal Review, Scoring and Selection Process:
CoC Program applications will be scored by HUD in accordance with the criteria set forth in the NOFA. It is the project applicant’s responsibility to review the NOFA and submit projects that support the NOFA requirements.

[Appendix A]

OR-506CoC Washington County Annual Renewal Demand (ARD): $3,279,139

HUD will continue to require CoC’s to rank all new and renewal projects, except CoC Planning, in two funding tiers.

- **Tier 1** is equal to the greater of the combined amount of Annual Renewal Amount (ARA) for all permanent housing and HMIS projects eligible for renewal up to $1,000,000 or 94 percent of the CoC’s FY2017 Annual Renewal Demand (ARD) to include all currently funded HUD CoC Program projects.
  - Tier 1 = $3,082,391 (94% of $3,279,139 ARD)
- **Tier 2** is the difference between Tier 1 and the CoC’s ARD plus any amount available for the permanent housing bonus.
  - Tier 2 = $196,748 (6% of $3,279,139 ARD)
- **Permanent Housing Bonus** to create new projects is up to 6 percent of the CoC’s Final Pro Rata Need (FPRN).
  - Permanent Housing Bonus (new) = $196,748

On May 10, 2017, Washington County submitted to HUD $3,279,139 in Annual Renewal Demand (ARD) for current CoC Program-funded projects as follows:

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<tr>
<th>Housing Type</th>
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<td>Homeless Management Information System</td>
<td>Washington County Department of Housing Services</td>
<td>$39,742</td>
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</tbody>
</table>

**Total Annual Renewal Demand:** $3,279,139

PSH = Permanent Supportive Housing  
RRH = Rapid Re-Housing  
TH = Transitional Housing  
SH = Safe Haven  
HMIS = Homeless Management Information System

[Appendix B]

**FY2017 PSH or RRH Bonus Project Proposal to HSSN**  
(Limit 2 pages)

**Project Name**

- **HUD Funds Requested**
  $ XXX.XX

**Legal Applicant Information**

Legal Name, Address, Agency Contact Name with email/phone information,  
*Note: Applicant/Project Sponsor (subrecipient) will need to have Data Universal Numbering System (DUNS), Employer/Taxpayer Identification Number (EIN/TIN), and compliance with Civil Rights Matters, and Certification of Consistency with the Consolidated Plan upon submittal of application.*

**Experience of Applicant, Sponsor(s) and Other Partners**

- Describe the basic organization and management structure. Include evidence of internal and external coordination and an adequate financial accounting system as demonstrated by fiscal audit.  
- Describe experience of the applicant, sponsors, and partners, as it relates to working with the target population experiencing homelessness.  
- Describe any outstanding monitoring/findings, including Continuum of Care Program and Emergency Solutions Grant (ESG) funds.  
- Acquisition/Construction/Rehab Funding Requests – Describe experience to timely construction or rehab projects and compliance with Section3.

**Project Description**

- Describe scope of the project activities to include: prioritizing how you will serve the highest need chronically homeless or other vulnerable population, the housing first model, and how your program will leverage mainstream resources to address the supportive service needs of the homeless.  
- Include total number of units and beds, services provided, etc.  
- Describe the estimated schedule for implementing the project activities, the management plan, and the method for assuring effective and timely completion of the project.  
- Will participants be required to live in a particular structure, unit or locality – and if yes,
explain how and why the project will implement this requirement? Will more than 16 persons with disabilities live in one structure?

• Describe the outreach and referral plan to bring homeless into the project.
• Describe data collection and participation in HMIS.

Project Budget and Funding

• Describe commitment to provide 25 percent cash and/or in-kind match for HUD funds
• Describe leveraging public and private funds to support the total project budget.
• Provide budget by activity component: Acquisition/Construction/Rehabilitation, Leasing, Rent Assistance, Services, Operations, and Administration costs for both HUD and non-HUD funds:

  Note: Total Project Cost = HUD CoC Funds + Matching Funds + Leverage Funds

Performance Measurements

• Describe how the project will demonstrate a reduction in the number of unsheltered chronic homeless persons in Washington County or unsheltered/sheltered youth, individuals or families with children.
• Describe the project’s quantifiable and measurable outcomes in supporting persons to increase housing stability, increased earned income or economic supports, and greater self-sufficiency.

Annette M. Evans
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Collaboration + Partnerships = Achieving our vision in A Road Home through strategic investments!

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REQUEST FOR PROPOSAL (RFP) AND RATING/REVIEW PROCEDURE

The Request For Proposal (RFP) process began with a publicly released notice to community stakeholders using email (nearly 500 contacts), social media (e.g. Facebook, Twitter), website, and public bulletin boards.

The RFP included links to the CoC Program Application and Award Process written standards.

Attachments:
1. 7/27/17 release of the RFP via email (with 8/11/17 reminder email)
2. 8/13/17 email confirming Facebook and Twitter release
3. Proof of website postings
4. CoC Program Application and Award Process, policy 578.8-OR506CoC
Reminder Notice: 8/17/17 is the deadline to submit intent to apply for funds under the FY2017 CoC Program grant competition, with project applications due 8/23/17. See July 27th notice published below for details, and feel free to contact me if you have questions. My office number is 503-846-4760 and email Annette Evans@co.washington.or.us.

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Collaborative Applicant will notify all new and renewal project applicants in writing of the selection or denial of applications for the CoC Consolidated Application.

Collaborative Applicant will complete CoC Priority Listing in HUD eSNAPS based on the HSSN Workgroup ranking and rating.

Collaborative Applicant submit final CoC Collaborative Application; HUD deadline September 28, 2017.

National Proposal Review, Scoring and Selection Process:
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[Appendix B]

**FY2017 PSH or RRH Bonus Project Proposal to HSSN**  
(Limit 2 pages)

Project Name

HUD Funds Requested  
$ XXX.XX

Legal Applicant Information  
Legal Name, Address, Agency Contact Name with email/phone information,  
*Note: Applicant/Project Sponsor (subrecipient) will need to have Data Universal Numbering System (DUNS), Employer/Taxpayer Identification Number (EIN/TIN), and compliance with Civil Rights Matters, and Certification of Consistency with the Consolidated Plan upon submittal of application.*

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- Describe the basic organization and management structure. Include evidence of internal and external coordination and an adequate financial accounting system as demonstrated by fiscal audit.  
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- Acquisition/Construction/Rehab Funding Requests – Describe experience to timely construction or rehab projects and compliance with Section3.

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- Describe scope of the project activities to include: prioritizing how you will serve the highest need chronically homeless or other vulnerable population, the housing first model, and how your program will leverage mainstream resources to address the supportive service needs of the homeless.  
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• Describe the outreach and referral plan to bring homeless into the project.
• Describe data collection and participation in HMIS.

Project Budget and Funding
• Describe commitment to provide 25 percent cash and/or in-kind match for HUD funds
• Describe leveraging public and private funds to support the total project budget.
• Provide budget by activity component: Acquisition/Construction/Rehabilitation, Leasing, Rent Assistance, Services, Operations, and Administration costs for both HUD and non-HUD funds:
  \[ \text{Note: Total Project Cost} = \text{HUD CoC Funds} + \text{Matching Funds} + \text{Leverage Funds} \]

Performance Measurements
• Describe how the project will demonstrate a reduction in the number of unsheltered chronic homeless persons in Washington County or unsheltered/sheltered youth, individuals or families with children.
• Describe the project’s quantifiable and measurable outcomes in supporting persons to increase housing stability, increased earned income or economic supports, and greater self-sufficiency.

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http://www.co.washington.or.us/Homeless

Collaboration = Achieving our vision in A Road Home through strategic investments!
To help ensure equal access to Washington County Department of Housing Services programs, we will provide translation, reasonably modify policies or procedures and provide auxiliary aids/services/alternative formats to persons with disabilities.
For TTY relay dial 711 or 1-800-735-1232. Para traducción en español marque 1-800-735-3896.
No problem!

The tweet can be viewed here:
https://twitter.com/WashcoOregon/status/896768422796603396

The Facebook post can be viewed here:
https://www.facebook.com/WashCoOregon/posts/899558356864739

I went ahead and used our info graphic to provide context for “Supportive Housing” so that the broader public will have a better understanding of how that kind of housing fits in with all the other kinds.

Hope that helps!

--Philip

Annette M. Evans
Homeless Program Coordinator | Washington County Department of Housing Services
(503)846-4760 | Annette_Evans@co.washington.or.us
Washington County, Oregon
@WashCoOregon

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Posts
Community

Create a Page

Washington County, Oregon
August 13 at 9:05am

Washington County Department of Housing Services is accepting project application proposals to develop affordable permanent supportive housing or rapid rehousing projects to serve homeless households. Application details are available online at http://www.co.washington.or.us/.../homeless-programs-and-events...

Homeless Programs and Events
Homeless Programs and Events info
CO.WASHINGTON.OR.US

1 Like
1 Comment
1 Share

1 share
Homeless Programs and Events

Programs Serving Homeless Persons

- Continuum of Care (CoC) Program
- Transitioning programs and rapid re-housing of youth and young adults
- Move On
- Housing Vouchers
- Housing for Seniors
- Current Clients
- Applying for Assistance
- Moving Toward Housing
- For Landlords
- Forms and Applications
- Committee & Information
- Running development
- Efforts to End Homelessness
- Slow Fence
- Shelter Resources
- Emergency Shelter Program
- Rapid Re-Housing Program
- Violence against women
- Intermediaries
- Issuing and Supporting Services

CoC Program awards for 2006:
- FY2006 CoC Program homeless assistance – Federal Award Announcement
- FY2006 CoC Program homeless assistance – Federal Award Announcement
- FY2006 CoC Program homeless assistance – Federal Award Announcement

Canoa Prevention Assistance (CPA) Programs

In 2006, Washington County implemented a new Homeless Prevention program serving low-income households that are severely rent burdened. The CPA program is coordinated with the Community Connect system and managed by Community Action Organization.

For referrals of awards to the program, please refer to Community Connect by calling 560-640-2222.
Policy: This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN).

Purpose: Design, operate and follow a collaborative process for the development of applications and approve the submission of application in response to a NOFA (Notice of Funding Available) published by HUD.

Standard: The HSSN is responsible for promoting community-wide commitment to the goal of ending homelessness through strategic planning, system change, program development, and prioritization of funds.

Scope: Homeless Provider Agencies, Community Stakeholders, recipient(s) and subrecipient(s) of CoC Program and Emergency Solution Grant (ESG) funds, the HMIS Lead, and the CoC Collaborative Applicant.

Authority For Code: Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act CoC Program regulatory statutes 24 CFR parts 578.9, 578.11, 578.13, 578.15, 578.17, 578.19, 578.21 and other such parts as applicable.

Responsibilities:

1. HOUSING AND SUPPORTIVE SERVICES NETWORK (HSSN) – THE COC
   As outlined in the CoC Governance, the HSSN is to provide a coordinated and comprehensive community planning process to implement a Continuum of Care (CoC) for individuals and families who are at risk or experiencing homelessness and to prevent a return to homelessness. Refer to CoC Governance policy 578.5-OR506CoC.

   A role administered by the HSSN is the preparing the McKinney-Vento Homeless Assistance grant application on behalf of OR-506 CoC Hillsboro/Beaverton/Washington County, Oregon. This policy outlines the process and criteria in ranking and rating renewal and new project applications requesting funds under the CoC Program 24 CFR Part 578.

2. PREPARING THE COC PROGRAM GRANT APPLICATION
   HSSN (the CoC)
   The HSSN is charged with design, operation and following a collaborative process for the development of applications and approve the submission of applications in response to a NOFA published by HUD under part 578.19.
HSSN will establish priorities for funding projects in the geographic area of OR-506 CoC.

The HSSN will elect a CoC Collaborative Applicant that will collect and combine the required application information from all applicants and for all projects within the geographic area that the CoC has selected funding. The CoC Collaborative Applicant will also apply for CoC Planning activities.

3. REQUEST FOR PROPOSAL AND RECORDKEEPING

CoC Collaborative Applicant

Elected by the HSSN, the CoC Collaborative Applicant will provide administrative support in coordinating and submitting the application, to include preparing the CoCs funding availability through Annual Renewal Demand (ARD) approved by HUD, reallocation of CoC Program-funded projects, and new CoC Program funds made available by HUD.

The CoC Collaborative Applicant will prepare and publish a Request For Proposal (RFP) with timeline for project proposal presentations, due date of applications, the date of the ranking/rating based on performance outcomes of HUD-Funded OR-506 CoC Programs (see Appendix A, Measuring Performance of HUD-funded CoC Program) and scoring by HSSN for new projects. The RFP will be a public announcement using email, bulletin boards, community forums, and posted on the jurisdiction’s website.

The CoC Collaborative Applicant will schedule presentations of all new projects at the next regular HSSN meeting following the Notice of Funding Available (NOFA) release by HUD, with each agency having one vote (see Appendix B, Project Evaluation Criteria). The CoC Collaborative Applicant will document the ranking and rating process of renewal and new project proposals, and submit the Project Priority List in the CoC Consolidated Application upon approval by the HSSN Workgroup. The HSSN Workgroup will review a summary sheet of the new project scores by agency for each project, and have the opportunity to review the individual detailed score sheets to validate the summary of scores.

Records supporting the grant application process will be retained for five (5) years following the HUD grant award announcement, and will include a summary of new project proposal scores, the Measuring Performance of HUD-funded CoC Programs, rank/rating results, letters or other communication regarding acceptance or rejection of project applications, project applications, and other CoC Program grant application.

4. RENEWAL PROJECT RANKING AND RATING PROCESS

HSSN Workgroup (the CoC Board)

The Workgroup is the administrative body of the HSSN, and responsible for:

a) Review Annual Performance Reports (APR) outcomes for all CoC Program projects;

b) Establish priorities for funding projects in alignment with the HSSN review of latest PIT/HIC reporting on homeless demographics and gaps in housing resources;
c) Review projects with non-compliance and/or outstanding on-site monitoring issues and consider reallocation of project funds (see Section 5);

d) Rate project performance using standard performance criterion to include:
   i. 10 points - Housing First (low-barrier access model)
   ii. 3 to 16 points - Target Population
   iii. 8 points – Exits to Permanent Housing
   iv. 4 points – Increase Earned Income from Entry to Annual Assessment/Exit
   v. 4 points – Increase Cash Income from Entry to Annual Assessment/Exit
   vi. 8 points – Maintain or Increase Non-Cash Income
   vii. 5 points – Bed Occupancy on PIT Date
   viii. 5 points – De-obligation of HUD Funds
   ix. Compliance/On-Site Monitoring Outcomes (Pass if all issues addressed/Fail if outstanding compliance issues)
   x. Commitment of Leverage Dollars (excludes 25% cash or in-kind match)

e) Rank projects in order of highest priority for funding being #1 with the lowest priority for funding being the last number in the CoC Program Project Priority List; and

f) Approve the final projects applications for submittal in the CoC Consolidated Plan.

For template of the rating matrix, see Appendix A, Measuring Performance of HUD-Funded OR-506 CoC Programs

5. REALLOCATION PROCESS

HSSN Workgroup (the CoC Board)

Reallocation is the process the CoC uses to shift funds in whole or part from existing eligible renewal projects to create one or more new projects within the CoC annual renewal demand for CoC Program funds. Existing providers are encouraged to apply for new projects through reallocation of their existing projects.

During the comprehensive review of renewal projects, the HSSN Workgroup will use the scoring criteria and selection priorities to determine the extent to which each project is still necessary and address priorities based on System Performance Measurement (SPM) outcomes, gaps analysis and homeless demographic data collected during point-in-time and Community Connect; e.g. ending chronic homelessness, veteran, youth, families with children. The HSSN Workgroup will reallocate funds to new projects whenever reallocations would reduce homelessness or address an underserved homeless population.

To minimize the risk of homeless participant displacement as a result of reallocation, the HSSN Workgroup will approach the reallocation decision as follows:

Current Notice of Funding Available (NOFA)

Determine immediate (current NOFA) reallocation at current grant term ending through reallocation of funds to new project as follows:

a) Project has unresolved on-site monitoring or financial issues outlined in Section 4.c;
OR-506CoC Hillsboro/Beaverton/Washington County, Oregon

CoC PROGRAM APPLICATION AND AWARD PROCESS

b) Project is extreme low performer with points at or below 50 percent of the scoring criteria defined in Section 4.d;

c) Participants can be served by another program within the CoC so as not to create a displacement of program participants; and

d) Project does not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ or the Declaration has expired (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

Note: If a ‘Declaration of Restrictive Covenant’ remains valid and the HSSN Workgroup chooses to reallocate the funds, the Recipient will work with the project sponsor agency (subrecipient) and HUD to determine next steps.

Future NOFA
Determine reallocation need and provide written notice to the project sponsor agency that the program will not be considered for renewal in a future CoC Program funding cycle – provide specific funding cycle that the funds will be reallocated. The HSSN Workgroup will approach the reallocation decision as follows:

e) Project has unresolved on-site monitoring issues – excluding financial issues - outlined in Section 4.c that would not prohibit the project from fully serving the participants;

f) Project is low performer with points at or below 55 percent of the scoring criteria defined in Section 4.d;

g) Project does not serve a priority population and the population may be better served by other community resources;

h) Project sponsor organization needs one additional year to effectively transition participants to new housing and services to minimize displacement of participants; and

i) Project may or may not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ that has not yet expired, and the project sponsor organization needs time to secure alternate financing to ensure compliance (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

6. NEW PROJECT RANKING AND RATING PROCESS
HSSN (the CoC)
The HSSN membership will receive presentations on new project proposals with eligible voting members completing the scoring process using the procedure and written standards outlined in Project Evaluation Criteria (Appendix B).

a) Rate project performance using standard performance criterion to include:

i. 20 points – Critical CoC Project Components; e.g. housing emphasis, capacity to develop and implement the project

ii. 8 points – Supports the 10-Year Plan and Consolidated Plan

iii. 12 points – Effectiveness of the Project

iv. 10 points – Resource Utilization

v. 5 points – Aligns with Local CoC and HUD Priorities

HSSN Workgroup (the CoC Board)
The Workgroup is the administrative body of the HSSN, and responsible for:
b) Review the project proposal scores from the HSSN membership;
c) Address any concerns raised by HSSN membership through a review with the project
   sponsor agency to include commitment and capacity to implement the program and serve
   the target population;
d) Rank projects in order of highest priority for funding being #1 with the lowest priority for
   funding being the last number in the CoC Program Project Priority List; and
 e) Approve the final projects applications for submittal in the CoC Consolidated
    Application.

7. APPEAL PROCESS
The project sponsor agency (recipient/subrecipient) may appeal the HSSN Workgroup
decision for renewal reallocation and/or new project selection as follows:
a) The project sponsor agency will submit a written appeal of the decision to the CoC
   Collaborative Applicant and the Chair of the HSSN Workgroup.
b) The Chair will convene the HSSN Workgroup (the local CoC Board) to receive and
   review the appeal statement.
c) The project sponsor agency will attend the meeting to answer questions the HSSN
   Workgroup may have in reviewing the appeal filed by the project sponsor agency.
d) The HSSN Workgroup will make a decision that will be recorded in minutes, and the
   CoC Collaborative Applicant will proceed with filing the CoC Program application in
   accordance with this policy and the determination of the HSSN Workgroup. Should the
   project sponsor agency seek to appeal the decision to a higher authority, the CoC
   membership will hear the matter at the next monthly meeting of the Washington County
   Housing and Supportive Services Network (HSSN).

The HSSN Workgroup’s decision to make reallocation decisions to be implemented in
“future NOFA” cycles will minimize displacement and support the transition of homeless
participants as well as reduce the need for appeal hearings during a very tight application
submittal timeframe.

8. CODE OF CONDUCT AND RECUSAL PROCESS
The implementation of a Code of Conduct for the HSSN, inclusive of the Chair, Co-Chair,
Workgroup, and associated Subcommittees, is an essential element that supports the
inclusive, collaborative, and objective goals of the HSSN. [CoC Program 24 CFR 578.95]
1. Meetings will be open to the public.
2. Members will provide information that is truthful and accurate.
3. Members will be respectful to others at all times.
4. Decision making process will:
   a. Be made by consensus at scheduled meetings.
   b. For non-funding decisions, all members present will have an option to participate in
      the voting, e.g. – selection of chair, co-chair, or other general membership decisions.
   c. For decisions involving funding, one vote per member organization and one vote per
      community at-large member based on a threshold of attendance (see Appendix B).
d. **Conflict of Interest.** Members will withdraw/excuse themselves from participating in decision-making (voting) process concerning awards of grants or provisions of financial benefit to which such member or his/her organization could have a future

9. **GRANT AWARD PROCESS**
   **CoC Collaborative Applicant**
   Upon HUD award announcement, the CoC Collaborative Applicant will notify selected applicants of the pending award, to include notice of any conditions imposed on awards by HUD.

   HUD will issue grant agreements in accordance with 24 CFR part 578.23, at which time the CoC Collaborative Applicant will prepare Grant Agreements with project subrecipient for activities administered by the subrecipient.

10. **REVISION HISTORY**

<table>
<thead>
<tr>
<th>Version/Date</th>
<th>Description of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>V0.2013</td>
<td>Original Version</td>
</tr>
<tr>
<td>V1. December 12, 2014</td>
<td>Section 4 include new criteria and scoring for renewal projects.</td>
</tr>
<tr>
<td>V2. June 9, 2017</td>
<td>Section 5 updates recordkeeping to include record retention.</td>
</tr>
</tbody>
</table>

**APPENDICES**
- Appendix A: Measuring Performance of HUD-Funded CoC Programs
- Appendix B: Project Evaluation Criteria.
## Measuring Performance of HUD-Funded CoC Programs

<table>
<thead>
<tr>
<th>Points</th>
<th>Outcome Description</th>
<th>Outcome Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Project follows Housing First Model</td>
<td>Yes = 10, Partial = 5, No = 0</td>
</tr>
<tr>
<td>16</td>
<td>Target Population - Severity of Need and Vulnerability</td>
<td>Chronically Homeless = 16, Veteran Homeless = 16, Domestic Violence/Human Trafficking = 13, Criminal History = 13, Active or history of substance abuse = 13, Mod-Barrier (RR/TH) = 10, Low-Barrier (RR/TH) = 5</td>
</tr>
<tr>
<td>8</td>
<td>Exits to Permanent Housing (Goal: 80%)</td>
<td>60%+ = 8, 60% to 79% = 6, 59% to 59% = 4, 50% to 44% = 2, 50% = 0</td>
</tr>
<tr>
<td>4</td>
<td>Gain or increase Earned Income (Goal: 20%)</td>
<td>21+ = 4, 20% to 29% = 3, 19% to 15% = 2, 14% to 10% = 1, 0% = 0</td>
</tr>
<tr>
<td>4</td>
<td>Gain or increase Cash Income (Goal: 54%)</td>
<td>54+ = 4, 53% to 53% = 3, 52% to 39% = 2, 51% to 20% = 1, 0% = 0</td>
</tr>
<tr>
<td>8</td>
<td>Increase Non-Cash Income (Goal: 54%)</td>
<td>54+ = 8, 53% to 53% = 6, 52% to 39% = 4, 51% to 20% = 2, 0% = 0</td>
</tr>
<tr>
<td>5</td>
<td>PIT Bed Occupancy (Goal: 80%)</td>
<td>60%+ = 5, 60% to 79% = 4, 59% to 60% = 3, 58% to 45% = 2, 51% to 30% = 1, 0% = 0</td>
</tr>
<tr>
<td>5</td>
<td>De-Obligation of HUD Funds (Goal: &lt;%)</td>
<td>&lt;1% = 5, 1% to 1.49% = 3, 1.5% to 1.99% = 1, 2% = 0</td>
</tr>
<tr>
<td>0</td>
<td>On-Site Monitoring Compliance and Fiscal Audit (to include Super Circular 2 CFR 200)</td>
<td>Tiebreaker for Ranking and Ratings</td>
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<tr>
<td>0</td>
<td>Commitment of Leverage ($ (excludes cash and in-kind match $)</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
<tr>
<td>0</td>
<td>Data Quality: Timeliness in Entering Data at Exit</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
</tbody>
</table>
## APPENDIX A

<table>
<thead>
<tr>
<th>CoC Program Project Title</th>
<th>Tier 1 Funding Request (Approved $)</th>
<th>Tier 2 Funding Request (Approved $)</th>
<th>Prioritization</th>
<th>Total Priority Points</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td>Tier 1 Request: $</td>
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<td>0</td>
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<tr>
<td>Tier 2 Request: $</td>
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<td></td>
<td>0</td>
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<tr>
<td>Not a Tier 1 and Tier 2 Project</td>
<td>0</td>
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<tr>
<td>Total Grant Request: $</td>
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</tbody>
</table>
### APPENDIX B

#### Washington County Continuum of Care (CoC)-OR-506

**PROJECT EVALUATION CRITERIA**

<table>
<thead>
<tr>
<th>Scoring Agency:</th>
<th>[Enter agency name based on attendance at CoC Meetings]</th>
</tr>
</thead>
</table>

**Project Name:**

**Project Sponsor:**

**Date Presented to HSSN:**

**Projects proposed for funding under the Washington County Continuum of Care will be evaluated utilizing the following criterion:**

<table>
<thead>
<tr>
<th>A. Critical Continuum of Care (CoC) Project Components (0-5 points each)</th>
<th>Max 20 Pts.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The project generates housing emphasis points for the CoC through more than 75% of the budget dedicated to acquisition, construction, rehabilitation, leasing or rent assistance activities.</td>
<td></td>
</tr>
<tr>
<td>2. The applicant sponsor demonstrates rapid implementation of the project and capacity to deliver the proposed services to the target population(s).</td>
<td></td>
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<tr>
<td>3. The project sponsor is financially capable to administer the grant and has no outstanding audit findings and/or financial management recommendations.</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>B. How project relates to 10-Year, the CoC &amp; Consolidated Plans (0-2 points each)</th>
<th>Max 8 Pts.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The activity is identified in the Continuum of Care 10-Year Plan and Consolidated Plan.</td>
<td></td>
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<tr>
<td>2. The needs of the target population are clearly identified and substantiated.</td>
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<tr>
<td>3. The activity supports the CoC goal to end chronic homelessness.</td>
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<tr>
<td>4. The activity project uses a low-barrier “housing first” model for rapid placement into housing.</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C. Effectiveness (0-2 points each)</th>
<th>Max 12 Pts.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Project accepts 100% referrals from Community Connect, a centralized entry system.</td>
<td></td>
</tr>
<tr>
<td>2. Participants will be helping to achieve self-sufficiency through employment linkage and access to mainstream resources.</td>
<td></td>
</tr>
<tr>
<td>3. The project promotes participant choice and interventions are tailored to meet the needs of all members in the household.</td>
<td></td>
</tr>
<tr>
<td>4. Program participant satisfaction will be collected and used to improve the program.</td>
<td></td>
</tr>
<tr>
<td>5. Participant data will be collected in HMIS.</td>
<td></td>
</tr>
<tr>
<td>6. If the project serves homeless families with children, the project sponsor has established policies and designated staff that ensure all children are enrolled in school.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>D. Resource Utilization (0-2 points each)</th>
<th>Max 10 Pts.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The applicant clearly identifies the activities for which McKinney-Vento funds will be used.</td>
<td></td>
</tr>
<tr>
<td>2. The project has direct linkages with other mainstream resources and service programs within the system.</td>
<td></td>
</tr>
<tr>
<td>3. The project utilizes existing services or complies with other program efforts as demonstrated in collaborative partnership(s) with other agencies.</td>
<td></td>
</tr>
<tr>
<td>4. Other potential or secured funding sources are identified and described.</td>
<td></td>
</tr>
<tr>
<td>5. The project attracts private funding.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E. BONUS: The project aligns with Local CoC and HUD priorities, as established in the Request For Proposal (RFP).</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRIORITY: Permanent Supportive Housing for Chronic Homelessness and Permanent Housing (Rapid Re-Housing) for Individuals and Families coming directly from street or shelter, to include persons fleeing Domestic Violence (Category 4 Homeless Definition).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Points:</th>
<th></th>
</tr>
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</table>

**Total maximum points possible:** 55
APPENDIX B

"Washington-County-Continuum-of-Care-(CoC)-OR-506"
PROJECT EVALUATION CRITERIA

PARTICIPANT VOTING PROCESS:
1. Housing and Supportive Services Network (HSSN) membership is open to any person interested in the issue of homelessness in Washington County.
2. All new and renewal projects are brought before the HSSN for review and prioritization.
3. Project sponsors requesting Continuum of Care funds provide a presentation to the HSSN in accordance with the HSSN Continuum of Care Planning Calendar and will format their presentation according to the Request For Proposal (RFP) standard rating criteria used by the HSSN.
4. HSSN members rate each project using the criteria point system, casting a vote (points) for each project. This evaluation criteria form was reviewed and approved for use by the HSSN in November 7, 2012 (originated January 2006).
5. The voting process (rating and prioritizing of projects) is the work of the HSSN while in attendance at a regular HSSN meeting.
6. Any agency or individual with a conflict of interest will abstain from voting.
7. This open process ensures that the objective rating and prioritizing system is fair, honest, inclusive, and unbiased. The Participant Voting Process and the Voting System is designed to create an open process within the Washington County HSSN.

VOTING SYSTEM:
1. Adoption of this project evaluation criteria voting system was implemented with the participation and consensus of HSSN members.
2. All agencies/groups/individuals are allowed to vote after attending a minimum of 8 meetings in a 12-month period (July to June).
3. Only one (1) vote per agency/group. Individuals not associated with an agency or group will have one (1) vote each.
4. A HSSN Work Group meeting is scheduled, at which time the HSSN Work Group tallies the votes and ranks the project on the Project Priorities Chart based on its score and in alignment with the goals and strategies outlined in the Federal Strategic Plan “Opening Doors” and the Washington County local 10-Year Plan to End Homelessness “A Road Home”. Project Sponsors are invited and encouraged to attend this meeting.

NOTE:
Final project priority selection will be performed by the HSSN Workgroup (the CoC Board). The project proposal applications will be reviewed to include the scores and comments received on new project proposals. The HSSN Workgroup will complete the rating and selection process for projects moving forward in the competition, and rank projects in priority order.

See CoC Program Application and Award Process, policy # 578.9-OR506CoC for additional details available online at www.co.washington.or.us/homeless.
PUBLIC POSTING EVIDENCE:
CoC PROJECT RATING AND REVIEW

The CoC completed the CoC Ranking and Rating process through a collaboration of the HSSN (CoC) stakeholders, the HSSN Workgroup (the CoC Board), with results of the process publicly noticed to the HSSN email listserv (nearly 500 contacts) and posted on the jurisdiction’s website.

On September 6 the HSSN scored the new project proposal with scores summarized and reviewed at the September 8 HSSN Workgroup meeting. The scores were summarized and submitted to the HSSN Workgroup on September 8.

Attachments:
1. September 10 email to HSSN with copy of Project Performance Ranking and Rating and link to website.
2. Measuring Performance of HUD-funded Projects – Score matrix with results and score sheet from policy.
3. HSSN September 6 Score for RISE, a new RRH project.
4. CoC Program Application and Award Process policy 578.9-OR506 CoC.
SAVE THE DATE:  Housing and Supportive Services Network (HSSN) Meeting  
Wednesday, September 6, 2017  
8:30 to 10:00 a.m.  
The Beaverton Building  
3rd Floor Training Room  
12725 SW Millikan Way, Suite 300, Beaverton, Oregon

I. GUEST SPEAKER: 8:35 a.m.  
- Ms. Marilyn Miller, Oregon Housing and Community Services (OHCS)  
  "Update on Governor’s Initiative to End Veterans' Homelessness, CoC and OR-DHS Data Sharing, and development of the Oregon Housing Plan"

II. GENERAL BUSINESS: 9:10 a.m.  
- FY2017 CoC Program new permanent housing project proposal(s) for $196,748 in CoC bonus funds. The CoC Program RFP was published July 27, with scoring of new project proposal(s) at the September 6 HSSN meeting, and ranking and rating of new and renewal CoC Program-funded projects at the September 8 HSSN Workgroup (CoC Board) meeting

Action Item

Prior to the meeting, HSSN members are encouraged to review the CoC Application and Award Policy # 578.9. Note: Prior to the presentation of new project proposals, the HSSN scoring criteria and process will be reviewed. Organizations who have achieved 66% attendance during the past 12 months will be eligible to vote.

Please review the attached agenda for a complete agenda.

TRANSPORTATION OPTIONS:  
a) Tri-Met MAX stop is “Beaverton Central”  
b) Parking Available

ATTACHMENTS:  
1. September 6, 2017 HSSN Meeting Packet (Agenda and Minutes)  
2. CoC Application and Award Policy #578.9. This policy is also available online at http://www.co.washington.or.us/Housing/EndHomelessness/upload/578-9-CoC-Application-and-Award-Policy-2.pdf

Thank you!
To: HSSN (The OR-506 CoC General Membership)

This notice is provided in compliance with the FY2017 CoC Program NOFA requirement to provide evidence of the CoC’s communication for rejected project applications, and will be uploaded into the FY2017 CoC Program Consolidated Application as proof of notification to the CoC and the project sponsor agencies.

This communication confirms project application status for inclusion in the FY2017 CoC Program Consolidated Application that will be submitted to the U.S. Department of Housing and Urban Development in response to the Request For Proposals (RFP) that was publicly announced on July 27 by Washington County Department of Housing Services, the CoC Collaborative Applicant. The RFP was communicated through a broad array of media to include email listserv, Facebook, Twitter, and public bulletin board postings that resulted in nine (9) project application submittals to include one (1) new rapid re-housing project, and eight (8) renewal projects providing transitional and permanent housing, HMIS and CoC Planning.

All 9 applications were reviewed, ranked and rated using a public process performed by the HSSN Workgroup (the CoC Board) on September 8, 2017. The rank and rate meeting date and policy was announced in the RFP, and members of the public were present to observe the discussion and decisions that resulted in the following project applications accepted and rejected and ranking process.

Rejected Applications: None

Accepted Applications: Projects 1 through 9 listed below
1. Transitional Living Program sponsored by Boys & Girls Aid
2. CoC Rapid Re-Housing for Families sponsored by Community Action Organization
3. Housing Stabilization Program sponsored by Good Neighbor Center
6. Homeless Management Information System sponsored by Washington County Department of Housing Services
7. Shelter Plus Care Renewal sponsored by Washington County Department of Housing Services
8. RISE: Re-Housing In Support of Employment sponsored by Community Action Organization (NEW PROJECT)
9. OR-506 CoC Planning FY2017 sponsored by Washington County Department of Housing Services, the CoC Collaborative Applicant (NEW PROJECT)

Reallocation of Funds: Zero funds reallocated.
Seven renewal CoC Program-funded projects were reviewed and met the CoCs performance
requirement threshold and need for serving priority populations. Discussion regarding performance outcomes occurred and recommendations on areas project sponsor agencies could improve outcomes in earned income and housing stability.

A copy of the CoC Project Performance and Scoring results for ranking and rating, the CoC Program Consolidated Application and the approved Priority Project Listing are available online at http://www.co.washington.or.us/Housing/EndHomelessness/homeless-programs-and-events.cfm.

Attachment:
  1) CoC Performance Ranking and Rating of CoC-funded Projects (also available at the link provided above)

Annette M. Evans
Homeless Program Coordinator
Chair, Housing and Supportive Services Network (HSSN)
Federal Continuum of Care (CoC) # OR-506CoC
Washington County Department of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63, Hillsboro, OR 97124-3082
📞 Phone: 503-846-4760, 📞 Mobile: 503-449-3684, 📷 Fax: 503-846-4795
http://www.co.washington.or.us/Homeless

Collaboration + Partnerships = Achieving our vision in A Road Home through strategic investments!

To help ensure equal access to Washington County Department of Housing Services programs, we will provide translation, reasonably modify policies or procedures and provide auxiliary aids/services/alternative formats to persons with disabilities. For TTY relay dial 711 or 1-800-735-1232. Para traducción en español marque 1-800-735-3896.
## Measuring Performance of HUD-funded OR-506 CoC Programs

**FY2017 programs are being measured by the objective “to end chronic homelessness and to move homeless people to permanent housing”**

**FY2017 CoC Program Grant Competition - $2 Billion HUD NOFA**

- Tier 1 Funding 94% of ARD
- Tier 2 funding is 6% of ARD plus new bonus $196,748

### Tier 1 & Tier 2 in Priority Order (Project #)

<table>
<thead>
<tr>
<th>CoC Program Project Title</th>
<th>HUD Funding Request (approved GIW)</th>
<th>Housing First</th>
<th>Target Population; Severity of Need and Vulnerability for &lt;30% AMI Households, Dedicated Beds</th>
<th>Goal 30%</th>
<th>4 pt</th>
<th>Goal 40%</th>
<th>4 pt</th>
<th>Goal 50%</th>
<th>4 pt</th>
<th>Goal 60%</th>
<th>4 pt</th>
<th>Goal &lt;1%</th>
<th>5 pt</th>
<th>Annual Monitoring &amp; Fiscal Audit</th>
<th>Commitment of Leverage $ (Excludes 25% Match $)</th>
<th>Data Quality: Timeliness (Data Entry &lt;6 Days)</th>
<th>Total Project Performance Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transitional Living Program</td>
<td>121,741 (6 units, 11 beds)</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>Pass</td>
<td>$64,102</td>
<td>54</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CoC Rapid Re-housing for Families</td>
<td>451,196 (30 units)</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>4</td>
<td>3</td>
<td>8</td>
<td>5</td>
<td>0</td>
<td>Pass</td>
<td>$460,420</td>
<td>48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing Stabilization (12 unit)</td>
<td>31,618 (12 units)</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>4</td>
<td>3</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>Pass</td>
<td>$ -</td>
<td>48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safe Haven (10 bed)</td>
<td>297,426 (12 units)</td>
<td>10</td>
<td>16</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>Pass</td>
<td>$123,070</td>
<td>44</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hillsboro Graduated Independent Living Program</td>
<td>90,713 (14 beds)</td>
<td>10</td>
<td>16</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>6</td>
<td>3</td>
<td>5</td>
<td>Pass</td>
<td>$30,000</td>
<td>43</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Homeless Management Information System</td>
<td>39,742</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>5</td>
<td>Pass</td>
<td>$ -</td>
<td>n/a</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelter Plus Care Renewal</td>
<td>2,049,955 (170 units)</td>
<td>10</td>
<td>13</td>
<td>4</td>
<td>1</td>
<td>4</td>
<td>8</td>
<td>5</td>
<td>1</td>
<td>Pass</td>
<td>$1,087,579</td>
<td>46</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Tier 1 Request: $3,082,391**

| Shelter Plus Care Renewal | 196,748 (170 units) | 10 | 13 | 4 | 1 | 4 | 8 | 5 | 1 | Pass | $1,087,579 | 46 |
| RISE: Rehousing in Support of Employment (NEW PROJECT) | 196,748 (12 units) | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | Pass | $182,689 | n/a |

**Tier 2 Request: $393,496**

**OR-506 CoC Planning FY2017**

| $98,374 | Not a Ranked and Rated Project | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | $ - | n/a |

**Total Grant Request: $3,574,261**

### REALLOCATION: The HSSN Workgroup determined that all current projects meet performance outcomes; therefore, no reallocation of CoC Program funds.

**9/8/2017; HSSN Workgroup (CoC Board)**
FY2017 Permanent Housing Bonus and Reallocation Funds:

<table>
<thead>
<tr>
<th>Name of Project:</th>
<th>RISE: Rehousing In Support of Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A. CoC Project Components</td>
</tr>
<tr>
<td></td>
<td>(20 points)</td>
</tr>
<tr>
<td>ODCC</td>
<td>20</td>
</tr>
<tr>
<td>Boys &amp; Girls Aid</td>
<td>16</td>
</tr>
<tr>
<td>Cascade AIDS</td>
<td>19</td>
</tr>
<tr>
<td>City of Beaverton</td>
<td>15</td>
</tr>
<tr>
<td>City of Hillsboro</td>
<td>17</td>
</tr>
<tr>
<td>Community Development</td>
<td>20</td>
</tr>
<tr>
<td>HomePlate</td>
<td>15</td>
</tr>
<tr>
<td>Housing Independence</td>
<td>20</td>
</tr>
<tr>
<td>Luke-Dorf</td>
<td>20</td>
</tr>
<tr>
<td>Lutheran Comm. Services</td>
<td>20</td>
</tr>
<tr>
<td>St. Anthony’s Shelter</td>
<td>18</td>
</tr>
</tbody>
</table>

Community Action Org: Presenting
CPAH: Reclused
DVRC: Not present
Good Neighbor Center: Not present
Impact NW: Not present
LifeWorks Northwest: Not present
Bridges to Change: Not present

<table>
<thead>
<tr>
<th>Average Points</th>
<th>18.2</th>
<th>7.5</th>
<th>9.5</th>
<th>8.5</th>
<th>2.5</th>
</tr>
</thead>
</table>

Total =

Only 1 project submitted for Bonus Funding
Policy:  This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN).

Purpose:  Design, operate and follow a collaborative process for the development of applications and approve the submission of application in response to a NOFA (Notice of Funding Available) published by HUD.

Standard:  The HSSN is responsible for promoting community-wide commitment to the goal of ending homelessness through strategic planning, system change, program development, and prioritization of funds.

Scope:  Homeless Provider Agencies, Community Stakeholders, recipient(s) and subrecipient(s) of CoC Program and Emergency Solution Grant (ESG) funds, the HMIS Lead, and the CoC Collaborative Applicant.

Authority For Code:  Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act CoC Program regulatory statutes 24 CFR parts 578.9, 578.11, 578.13, 578.15, 578.17, 578.19, 578.21 and other such parts as applicable.

Responsibilities:

1. HOUSING AND SUPPORTIVE SERVICES NETWORK (HSSN) – THE COC
   As outlined in the CoC Governance, the HSSN is to provide a coordinated and comprehensive community planning process to implement a Continuum of Care (CoC) for individuals and families who are at risk or experiencing homelessness and to prevent a return to homelessness. Refer to CoC Governance policy 578.5-OR506CoC.

   A role administered by the HSSN is the preparing the McKinney-Vento Homeless Assistance grant application on behalf of OR-506 CoC Hillsboro/Beaverton/Washington County, Oregon. This policy outlines the process and criteria in ranking and rating renewal and new project applications requesting funds under the CoC Program 24 CFR Part 578.

2. PREPARING THE COC PROGRAM GRANT APPLICATION
   HSSN (the CoC)
   The HSSN is charged with design, operation and following a collaborative process for the development of applications and approve the submission of applications in response to a NOFA published by HUD under part 578.19.
<table>
<thead>
<tr>
<th>Total</th>
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<tbody>
<tr>
<td>(55 points)</td>
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<tr>
<td>55</td>
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<td>41</td>
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<td></td>
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</tbody>
</table>

| 46.2 |   |
HSSN will establish priorities for funding projects in the geographic area of OR-506 CoC.

The HSSN will elect a CoC Collaborative Applicant that will collect and combine the required application information from all applicants and for all projects within the geographic area that the CoC has selected funding. The CoC Collaborative Applicant will also apply for CoC Planning activities.

3. REQUEST FOR PROPOSAL AND RECORDKEEPING

CoC Collaborative Applicant

Elected by the HSSN, the CoC Collaborative Applicant will provide administrative support in coordinating and submitting the application, to include preparing the CoC's funding availability through Annual Renewal Demand (ARD) approved by HUD, reallocation of CoC Program-funded projects, and new CoC Program funds made available by HUD.

The CoC Collaborative Applicant will prepare and publish a Request For Proposal (RFP) with timeline for project proposal presentations, due date of applications, the date of the ranking/rating based on performance outcomes of HUD-Funded OR-506 CoC Programs (see Appendix A, Measuring Performance of HUD-funded CoC Program) and scoring by HSSN for new projects. The RFP will be a public announcement using email, bulletin boards, community forums, and posted on the jurisdiction’s website.

The CoC Collaborative Applicant will schedule presentations of all new projects at the next regular HSSN meeting following the Notice of Funding Available (NOFA) release by HUD, with each agency having one vote (see Appendix B, Project Evaluation Criteria). The CoC Collaborative Applicant will document the ranking and rating process of renewal and new project proposals, and submit the Project Priority List in the CoC Consolidated Application upon approval by the HSSN Workgroup. The HSSN Workgroup will review a summary sheet of the new project scores by agency for each project, and have the opportunity to review the individual detailed score sheets to validate the summary of scores.

Records supporting the grant application process will be retained for five (5) years following the HUD grant award announcement, and will include a summary of new project proposal scores, the Measuring Performance of HUD-funded CoC Programs, rank/rating results, letters or other communication regarding acceptance or rejection of project applications, project applications, and other CoC Program grant application.

4. RENEWAL PROJECT RANKING AND RATING PROCESS

HSSN Workgroup (the CoC Board)

The Workgroup is the administrative body of the HSSN, and responsible for:

a) Review Annual Performance Reports (APR) outcomes for all CoC Program projects;

b) Establish priorities for funding projects in alignment with the HSSN review of latest PIT/HIC reporting on homeless demographics and gaps in housing resources;
5. REALLOCATION PROCESS

HSSN Workgroup (the CoC Board)

Reallocation is the process the CoC uses to shift funds in whole or part from existing eligible renewal projects to create one or more new projects within the CoC annual renewal demand for CoC Program funds. Existing providers are encouraged to apply for new projects through reallocation of their existing projects.

During the comprehensive review of renewal projects, the HSSN Workgroup will use the scoring criteria and selection priorities to determine the extent to which each project is still necessary and address priorities based on System Performance Measurement (SPM) outcomes, gaps analysis and homeless demographic data collected during point-in-time and Community Connect; e.g. ending chronic homelessness, veteran, youth, families with children. The HSSN Workgroup will reallocate funds to new projects whenever reallocations would reduce homelessness or address an underserved homeless population.

To minimize the risk of homeless participant displacement as a result of reallocation, the HSSN Workgroup will approach the reallocation decision as follows:

Current Notice of Funding Available (NOFA)

Determine immediate (current NOFA) reallocation at current grant term ending through reallocation of funds to new project as follows:

a) Project has unresolved on-site monitoring or financial issues outlined in Section 4.c;
CoC PROGRAM APPLICATION AND AWARD PROCESS

b) Project is extreme low performer with points at or below 50 percent of the scoring criteria defined in Section 4.d;

c) Participants can be served by another program within the CoC so as not to create a displacement of program participants; and

d) Project does not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ or the Declaration has expired (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

Note: If a ‘Declaration of Restrictive Covenant’ remains valid and the HSSN Workgroup chooses to reallocate the funds, the Recipient will work with the project sponsor agency (subrecipient) and HUD to determine next steps.

Future NOFA

Determine reallocation need and provide written notice to the project sponsor agency that the program will not be considered for renewal in a future CoC Program funding cycle – provide specific funding cycle that the funds will be reallocated. The HSSN Workgroup will approach the reallocation decision as follows:

e) Project has unresolved on-site monitoring issues – excluding financial issues - outlined in Section 4.c that would not prohibit the project from fully serving the participants;

f) Project is low performer with points at or below 55 percent of the scoring criteria defined in Section 4.d;

g) Project does not serve a priority population and the population may be better served by other community resources;

h) Project sponsor organization needs one additional year to effectively transition participants to new housing and services to minimize displacement of participants; and

i) Project may or may not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ that has not yet expired, and the project sponsor organization needs time to secure alternate financing to ensure compliance (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

6. NEW PROJECT RANKING AND RATING PROCESS

HSSN (the CoC)

The HSSN membership will receive presentations on new project proposals with eligible voting members completing the scoring process using the procedure and written standards outlined in Project Evaluation Criteria (Appendix B).

a) Rate project performance using standard performance criterion to include:

i. 20 points – Critical CoC Project Components; e.g. housing emphasis, capacity to develop and implement the project

ii. 8 points – Supports the 10-Year Plan and Consolidated Plan

iii. 12 points – Effectiveness of the Project

iv. 10 points – Resource Utilization

v. 5 points – Aligns with Local CoC and HUD Priorities

HSSN Workgroup (the CoC Board)
The Workgroup is the administrative body of the HSSN, and responsible for:
b) Review the project proposal scores from the HSSN membership;
c) Address any concerns raised by HSSN membership through a review with the project sponsor agency to include commitment and capacity to implement the program and serve the target population;
d) Rank projects in order of highest priority for funding being #1 with the lowest priority for funding being the last number in the CoC Program Project Priority List; and
e) Approve the final projects applications for submittal in the CoC Consolidated Application.

7. APPEAL PROCESS
The project sponsor agency (recipient/subrecipient) may appeal the HSSN Workgroup decision for renewal reallocation and/or new project selection as follows:
a) The project sponsor agency will submit a written appeal of the decision to the CoC Collaborative Applicant and the Chair of the HSSN Workgroup.
b) The Chair will convene the HSSN Workgroup (the local CoC Board) to receive and review the appeal statement.
c) The project sponsor agency will attend the meeting to answer questions the HSSN Workgroup may have in reviewing the appeal filed by the project sponsor agency.
d) The HSSN Workgroup will make a decision that will be recorded in minutes, and the CoC Collaborative Applicant will proceed with filing the CoC Program application in accordance with this policy and the determination of the HSSN Workgroup. Should the project sponsor agency seek to appeal the decision to a higher authority, the CoC membership will hear the matter at the next monthly meeting of the Washington County Housing and Supportive Services Network (HSSN).

The HSSN Workgroup’s decision to make reallocation decisions to be implemented in “future NOFA” cycles will minimize displacement and support the transition of homeless participants as well as reduce the need for appeal hearings during a very tight application submittal timeframe.

8. CODE OF CONDUCT AND RECUSAL PROCESS
The implementation of a Code of Conduct for the HSSN, inclusive of the Chair, Co-Chair, Workgroup, and associated Subcommittees, is an essential element that supports the inclusive, collaborative, and objective goals of the HSSN. [CoC Program 24 CFR 578.95]
1. Meetings will be open to the public.
2. Members will provide information that is truthful and accurate.
3. Members will be respectful to others at all times.
4. Decision making process will:
   a. Be made by consensus at scheduled meetings.
   b. For non-funding decisions, all members present will have an option to participate in the voting, e.g. – selection of chair, co-chair, or other general membership decisions.
   c. For decisions involving funding, one vote per member organization and one vote per community at-large member based on a threshold of attendance (see Appendix B).
d. **Conflict of Interest.** Members will withdraw/excuse themselves from participating in decision-making (voting) process concerning awards of grants or provisions of financial benefit to which such member or his/her organization could have a future.

### 9. GRANT AWARD PROCESS

**CoC Collaborative Applicant**

Upon HUD award announcement, the CoC Collaborative Applicant will notify selected applicants of the pending award, to include notice of any conditions imposed on awards by HUD.

HUD will issue grant agreements in accordance with 24 CFR part 578.23, at which time the CoC Collaborative Applicant will prepare Grant Agreements with project subrecipient for activities administered by the subrecipient.

### 10. REVISION HISTORY

<table>
<thead>
<tr>
<th>Version/Date</th>
<th>Description of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>V0.2013</td>
<td>Original Version</td>
</tr>
<tr>
<td>V1. December 12, 2014</td>
<td>Section 4 include new criteria and scoring for renewal projects.</td>
</tr>
<tr>
<td>V2. June 9, 2017</td>
<td>Section 5 updates recordkeeping to include record retention.</td>
</tr>
</tbody>
</table>

### APPENDICES

- Appendix A: Measuring Performance of HUD-Funded CoC Programs
- Appendix B: Project Evaluation Criteria.
### Measuring Performance of HUD-Funded CoC Programs

<table>
<thead>
<tr>
<th>Points Total</th>
<th>Outcome Description</th>
<th>Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Project follows Housing First Model</td>
<td>Yes = 10, Partial = 5, No = 0</td>
</tr>
<tr>
<td>16</td>
<td>Target Population - Severity of Need and Vulnerability</td>
<td>Chronic Homeless = 16, Veteran Homeless = 16, Domestic Violence/Human Trafficking = 13, Criminal History = 13, Active or History of Substance Abuse = 13, Mod-BARRIER (RR/TH) = 10, Low-BARRIER (RR/TH) = 5</td>
</tr>
<tr>
<td>8</td>
<td>Exits to Permanent Housing (Goal: 80%)</td>
<td>60-78% = 0, 60-78% = 6, 60-78% = 4, 60-78% = 2, 50-78% = 0</td>
</tr>
<tr>
<td>4</td>
<td>Gain or Increase Earned Income (Goal: 20%)</td>
<td>21+ = 4, 16-20+ = 3, 11-15+ = 2, 6-10+ = 1, 0-5+ = 0</td>
</tr>
<tr>
<td>4</td>
<td>Gain or Increase Cash Income (Goal: 54%)</td>
<td>54+ = 4, 40-53+ = 3, 40-53+ = 2, 40-53+ = 1, 0-53+ = 0</td>
</tr>
<tr>
<td>8</td>
<td>Increase Non-Cash Income (Goal: 54%)</td>
<td>54+ = 8, 40-53+ = 6, 40-53+ = 4, 40-53+ = 2, 0-53+ = 0</td>
</tr>
<tr>
<td>5</td>
<td>PIT Bed Occupancy (Goal: 80%)</td>
<td>60+ = 5, 61-79+ = 4, 61-79+ = 3, 61-79+ = 2, 61-79+ = 1, 0-15+ = 0</td>
</tr>
<tr>
<td>5</td>
<td>De-Obligation of HUD Funds (Goal: &lt;%)</td>
<td>&lt;1% = 5, 1-1.49% = 3, 1.5% to 1.99% = 1, &gt;2% = 0</td>
</tr>
<tr>
<td>0</td>
<td>On-Site Monitoring Compliance and Fiscal Audit (to include Super Circular 2 CFR 200)</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
<tr>
<td>0</td>
<td>Commitment of Leverage $ (excludes cash and in-kind match $)</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
<tr>
<td>0</td>
<td>Data Quality: Timeliness in Entering Data at Exit</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
</tbody>
</table>
### APPENDIX A

**PY20XX CoC Grant Program Application**

**CoC Program Project Title**

<table>
<thead>
<tr>
<th>Tier 1 Request</th>
<th>Tier 2 Request</th>
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<tbody>
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**Tier 1 & Tier 2 in Priority Order (Projects)**

<table>
<thead>
<tr>
<th>CoC Program Project Title</th>
<th>Total Project Points</th>
<th>Tier 1 Utilization</th>
<th>Tier 2 Utilization</th>
<th>Total Utilization</th>
<th>Total Request</th>
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</table>

**Total Grant Request:** $
APPENDIX B

WASHINGTON COUNTY CONTINUUM OF CARE (CoC)-OR-506

PROJECT EVALUATION CRITERIA

PARTICIPANT VOTING PROCESS:

1. Housing and Supportive Services Network (HSSN) membership is open to any person interested in the issue of homelessness in Washington County.
2. All new and renewal projects are brought before the HSSN for review and prioritization.
3. Project sponsors requesting Continuum of Care funds provide a presentation to the HSSN in accordance with the HSSN Continuum of Care Planning Calendar and will format their presentation according to the Request For Proposal (RFP) standard rating criteria used by the HSSN.
4. HSSN members rate each project using the criteria point system, casting a vote (points) for each project. This evaluation criteria form was reviewed and approved for use by the HSSN in November 7, 2012 (originated January 2006).
5. The voting process (rating and prioritizing of projects) is the work of the HSSN while in attendance at a regular HSSN meeting.
6. Any agency or individual with a conflict of interest will abstain from voting.
7. This open process ensures that the objective rating and prioritizing system is fair, honest, inclusive, and unbiased. The Participant Voting Process and the Voting System is designed to create an open process within the Washington County HSSN.

VOTING SYSTEM:

1. Adoption of this project evaluation criteria voting system was implemented with the participation and consensus of HSSN members.
2. All agencies/groups/individuals are allowed to vote after attending a minimum of 8 meetings in a 12-month period (July to June).
3. Only one (1) vote per agency/group. Individuals not associated with an agency or group will have one (1) vote each.
4. A HSSN Work Group meeting is scheduled, at which time the HSSN Work Group tallies the votes and ranks the project on the Project Priorities Chart based on its score and in alignment with the goals and strategies outlined in the Federal Strategic Plan “Opening Doors” and the Washington County Local 10-Year Plan to End Homelessness “A Road Home”. Project Sponsors are invited and encouraged to attend this meeting.

NOTE:

Final project priority selection will be performed by the HSSN Workgroup (the CoC Board). The project proposal applications will be reviewed to include the scores and comments received on new project proposals. The HSSN Workgroup will complete the rating and selection process for projects moving forward in the competition, and rank projects in priority order.

See CoC Program Application and Award Process, policy # 578.9-OR506CoC for additional details available online at www.co.washington.or.us/homeless.
COC PROCESS FOR REALLOCATION

In accordance with the CoC Program Application and Award Process, policy 578.9-OR506CoC, the HSSN Workgroup (the CoC Board) and CoC members at-large met on September 8, 2017 to review new and renewal project applications submitted in response to the Request For Proposals (RFP) published on July 27 by Washington County Department of Housing Services, the CoC Collaborative Applicant.

The CoC utilizes the reallocation process as a mechanism to:
- improve program performance, increase system capacity and/or to prioritize funds to better serve a new or increasing homeless demographics within the jurisdiction; and
- actively encourage new and existing providers to apply for new projects through a reallocation of existing projects; e.g. FY2016 CoC Consolidated Application included the reallocation of $14,772 in transitional housing.

On September 8, the Workgroup determined that no reallocation of funds would occur in the FY2017 CoC Consolidated Application based on:
1. After extensive outreach and public notification on the opportunity to apply for funding, the CoC received one (1) new project application that totaled the value of the permanent housing bonus amount. This leaves the CoC with limited options for developing new projects through reallocation; and
2. The HSSN Workgroup members performance an analysis and agreed with the CoC Program recipient/sub-recipient agencies that current projects are exceeding the minimum threshold in performance and that all program beds are needed to address the housing and service gaps identified by the CoC.

Published in the July 27 RFP was a link to the CoC Program Application and Award Process that outlined the process for reallocation.

Decision:
Consensus of the HSSN Workgroup to not reallocate CoC funding in the FY2017 CoC Program Consolidated Application.

Attachment:  CoC Program Application and Award Process
REQUEST FOR PROPOSALS

PERMANENT HOUSING BONUS FUNDS TO CREATE
NEW PERMANENT SUPPORTIVE HOUSING (PSH) SERVING THE CHRONICALLY
HOMELESS AND RAPID REHOUSING (RRH) THAT WILL SERVE INDIVIDUALS AND
FAMILIES COMING DIRECTLY FROM THE STREET OR SHELTER
TO INCLUDE PERSONS FLEEING DOMESTIC VIOLENCE, AND
RENEWAL OF COC PROGRAM FUNDED PROJECTS

OR-506CoC Washington County Annual Renewal Demand (ARD): $3,279,139
New Permanent Housing Bonus: Up to $196,748

This announcement is provided in compliance with 24 CFR 578.9 to design, operate and follow a collaborative process for the
development of applications and approve the submission of the applications in response to a NOFA published by HUD.

July 27, 2017

Washington County, Oregon, serving as the Collaborative Applicant for the local homeless continuum of
care (CoC) planning process under the governance of the Washington County Housing and Supportive
Services Network (HSSN) announced the request for projects and will consider applications from
organizations that have not previously received CoC Program funding to provide housing and services to
include Permanent Supportive Housing (PSH) for chronically homeless individuals and families, and new
Rapid Rehousing (RRH) for individuals and families with children coming directly from the streets or
emergency shelters. New in the FY2017 competition is the DedicatedPLUS, expansion of permanent
housing (PH) projects, and Joint TH and PH-RRH. This RFP serves as official notice for selection of
renewal project applications from organizations receiving CoC Program funds to continue serving
homeless individuals and families. A copy of this Request For Proposals (RFP) with local FY2017 CoC
Program application updates is available online at
http://www.co.washington.or.us/Housing/EndHomelessness/homeless-programs-and-events.cfm.

The HSSN prioritized renewal of CoC Program projects providing housing and services as outlined in A
Road Home: 10-Year Plan to End Homelessness in Washington County and in alignment with Opening
Doors: Federal Strategic Plan to Prevent and End Homelessness, and has determined existing housing,
and HMIS projects that meet performance outcomes will be renewed with current Project Sponsor
Agencies. See Appendix A attached to this notice.

The U.S. Department of Housing and Urban Development (HUD) has prioritized the need to end chronic
homelessness by 2017, and youth and family homelessness by 2020. A new Permanent Housing Bonus
funding competition is available to address these goals. Renewal and new projects must meet the
program priorities, project quality thresholds, and standards set forth in this RFP and in alignment with
the Federal FY2017 CoC NOFA, available online https://www.hudexchange.info/resource/5419/fy-2017-
coc-program-nofa/

Overview:
On July 14, 2017, the U.S. Department of Housing and Urban Development (HUD) announced
approximately $2 billion available in the FY2017 CoC Program Competition to renew high-performing
projects, and the creation of new projects through reallocation and new Permanent Housing Bonus funds.

New PSH or RRH projects must meet the program eligibility and threshold requirements established by
HUD in the NOFA, to include Sections V.G.2.b (page 30), V.G.2.c (page 32) and V.G.2.d (page 35).
Project applications must demonstrate the extent to which the applicant:
(1) Prioritizes Highest Need Populations: Serves chronic homeless and other vulnerable homeless persons as outlined in HUD CPD-16-11, adopted by HSSN on August 3, 2016.

(2) Housing First: The PSH or RRH project follows a Housing First model as defined in Section II.A.4 of the NOFA, and demonstrates experience in operating a Housing First program.

(3) Mainstream Services: The project fully leverages mainstream resources.

(4) Leveraging: The project leverages resources to develop a comprehensive project that will meet the needs of the target population and ensure successful program outcomes. Written statement of cash or in-kind leveraged commitment is required at time of application.

Washington County, acting as the Project Applicant (recipient), will work in partnership with the Project Sponsor Agency (subrecipient) to submit the application as a new project in the CoC Consolidated Application. The Project Sponsor Agency must meet applicant eligibility standards, demonstrate fiscal capacity to administer the project, and statutory deadlines regarding the obligation of grant funds as stated in the HUD Appropriations Act. HUD will review eligibility as part of the threshold review process.

New Permanent Housing Bonus Project:
Total Funds: Up to $196,748 (Budget limits include 7% maximum in Administration that is split 50/50 between Project Sponsor Agency and Washington County).
Funding Match: 25% cash or in-kind, in compliance with CoC Program 24 CFR 578.73.
Term of Project: Minimum term is 1-year. Exception, capital project term is 3-years. Capital projects must meet Section 3 requirements.

CoC Transparent Application Process: Review, Scoring and Selection Timeline:
This RFP outlines the project proposal process as a function of the HSSN (the CoC membership at-large). Applicants are encouraged to review the scoring criteria outlined in 578.9-OR506 CoC Program Application and Award Process available online at http://www.co.washington.or.us/Housing/EndHomelessness/upload/578-9-CoC-Application-and-Award-Policy-2.pdf
7/27/2017 Public notice of the Request For Proposal (RFP) to the CoC HSSN and public at-large.
8/17/2017 For new Bonus competition, Project Sponsor Agency will schedule project proposal presentation with the CoC HSSN Chair, Annette Evans, at 503-846-4760 or Annette_Evans@co.washington.or.us.
8/23/2017 New and renewal project applications are due by 5 p.m. to the CoC Collaborative Applicant, Attention: Annette Evans.
9/6/2017 CoC HSSN will score new project proposals. Project Sponsor Agency will present to HSSN members (10 minutes with 5 minute questions/answers period), and provide 45 copies of the project proposal – See Appendix B. The proposal will be a summary of the CoC Project Application. Scoring will include One (1) vote per eligible agency or individual.
9/8/2017 HSSN Workgroup (the CoC Board) will review the scores and comments provided by the HSSN membership for final selection and ranking. Project Sponsor Agencies for new and renewal project applications are encouraged to attend this meeting.
9/11/2017 Collaborative Applicant will notify all new and renewal project applicants in writing of the selection or denial of applications for the CoC Consolidated Application.
9/15/2017 Collaborative Applicant will complete CoC Priority Listing in HUD eSNAPS based on the HSSN Workgroup ranking and rating.

National Proposal Review, Scoring and Selection Process:
CoC Program applications will be scored by HUD in accordance with the criteria set forth in the NOFA. It is the project applicant’s responsibility to review the NOFA and submit projects that support the NOFA requirements.
HUD will continue to require CoC’s to rank all new and renewal projects, except CoC Planning, in two funding tiers.

- **Tier 1** is equal to the greater of the combined amount of Annual Renewal Amount (ARA) for all permanent housing and HMIS projects eligible for renewal up to $1,000,000 or 94 percent of the CoC’s FY2017 Annual Renewal Demand (ARD) to include all currently funded HUD CoC Program projects.
  - Tier 1 = $3,082,391 (94% of $3,279,139 ARD)

- **Tier 2** is the difference between Tier 1 and the CoC’s ARD plus any amount available for the permanent housing bonus.
  - Tier 2 = $196,748 (6% of $3,279,139 ARD)

- **Permanent Housing Bonus** to create new projects is up to 6 percent of the CoC’s Final Pro Rata Need (FPRN).
  - Permanent Housing Bonus (new) = $196,748

On May 10, 2017, Washington County submitted to HUD $3,279,139 in Annual Renewal Demand (ARD) for current CoC Program-funded projects as follows:

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>Project Title</th>
<th>Project Sponsor Agency</th>
<th>FY2016 HUD Award (Renewal $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSH</td>
<td>Hillsboro Graduated Independent Living</td>
<td>Luke-Dorf, Inc.</td>
<td>$90,713</td>
</tr>
<tr>
<td>PSH</td>
<td>Shelter Plus Care Renewal (includes consolidation of Tri-Haven)</td>
<td>Washington County Department of Housing Services</td>
<td>$2,246,703</td>
</tr>
<tr>
<td>RRH</td>
<td>CoC Rapid Re-Housing for Families</td>
<td>Community Action</td>
<td>$451,196</td>
</tr>
<tr>
<td>RRH</td>
<td>Housing Stabilization Program</td>
<td>Good Neighbor Center</td>
<td>$31,618</td>
</tr>
<tr>
<td>TH</td>
<td>Transitional Living Program</td>
<td>Boys &amp; Girls Aid</td>
<td>$121,741</td>
</tr>
<tr>
<td>SH</td>
<td>Safe Haven</td>
<td>Luke-Dorf, Inc.</td>
<td>$297,426</td>
</tr>
<tr>
<td>HMIS</td>
<td>Homeless Management Information System</td>
<td>Washington County Department of Housing Services</td>
<td>$39,742</td>
</tr>
</tbody>
</table>

Total Annual Renewal Demand: $3,279,139

PSH = Permanent Supportive Housing  
RRH = Rapid Re-Housing  
TH = Transitional Housing  
SH = Safe Haven  
HMIS = Homeless Management Information System
[Appendix B]

FY2017 PSH or RRH Bonus Project Proposal to HSSN
(Limit 2 pages)

Project Name

HUD Funds Requested
$ XXX.XX

Legal Applicant Information

Legal Name, Address, Agency Contact Name with email/phone information,
Note: Applicant/Project Sponsor (subrecipient) will need to have Data Universal Numbering System (DUNS), Employer/Taxpayer Identification Number (EIN/TIN), and compliance with Civil Rights Matters, and Certification of Consistency with the Consolidated Plan upon submittal of application.

Experience of Applicant, Sponsor(s) and Other Partners

- Describe the basic organization and management structure. Include evidence of internal and external coordination and an adequate financial accounting system as demonstrated by fiscal audit.
- Describe experience of the applicant, sponsors, and partners, as it relates to working with the target population experiencing homelessness.
- Describe any outstanding monitoring/findings, including Continuum of Care Program and Emergency Solutions Grant (ESG) funds.
- Acquisition/Construction/Rehab Funding Requests – Describe experience to timely construction or rehab projects and compliance with Section 3.

Project Description

- Describe scope of the project activities to include: prioritizing how you will serve the highest need chronically homeless or other vulnerable population, the housing first model, and how your program will leverage mainstream resources to address the supportive service needs of the homeless.
- Include total number of units and beds, services provided, etc.
- Describe the estimated schedule for implementing the project activities, the management plan, and the method for assuring effective and timely completion of the project.
- Will participants be required to live in a particular structure, unit or locality – and if yes, explain how and why the project will implement this requirement? Will more than 16 persons with disabilities live in one structure?
- Describe the outreach and referral plan to bring homeless into the project.
- Describe data collection and participation in HMIS.

Project Budget and Funding

- Describe commitment to provide 25 percent cash and/or in-kind match for HUD funds
- Describe leveraging public and private funds to support the total project budget.
- Provide budget by activity component: Acquisition/Construction/Rehabilitation, Leasing, Rent Assistance, Services, Operations, and Administration costs for both HUD and non-HUD funds:
  Note: Total Project Cost = HUD CoC Funds + Matching Funds + Leverage Funds

Performance Measurements

- Describe how the project will demonstrate a reduction in the number of unsheltered chronic homeless persons in Washington County or unsheltered/sheltered youth, individuals or families with children.
- Describe the project’s quantifiable and measurable outcomes in supporting persons to increase housing stability, increased earned income or economic supports, and greater self-sufficiency.
Policy:  This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN).

Purpose:  Design, operate and follow a collaborative process for the development of applications and approve the submission of application in response to a NOFA (Notice of Funding Available) published by HUD.

Standard:  The HSSN is responsible for promoting community-wide commitment to the goal of ending homelessness through strategic planning, system change, program development, and prioritization of funds.

Scope:  Homeless Provider Agencies, Community Stakeholders, recipient(s) and subrecipient(s) of CoC Program and Emergency Solution Grant (ESG) funds, the HMIS Lead, and the CoC Collaborative Applicant.

Authority For Code:  Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act CoC Program regulatory statutes 24 CFR parts 578.9, 578.11, 578.13, 578.15, 578.17, 578.19, 578.21 and other such parts as applicable.

Responsibilities:

1.  HOUSING AND SUPPORTIVE SERVICES NETWORK (HSSN) – THE COC

As outlined in the CoC Governance, the HSSN is to provide a coordinated and comprehensive community planning process to implement a Continuum of Care (CoC) for individuals and families who are at risk or experiencing homelessness and to prevent a return to homelessness. Refer to CoC Governance policy 578.5-OR506CoC.

A role administered by the HSSN is the preparing the McKinney-Vento Homeless Assistance grant application on behalf of OR-506 CoC Hillsboro/Beaverton/Washington County, Oregon. This policy outlines the process and criteria in ranking and rating renewal and new project applications requesting funds under the CoC Program 24 CFR Part 578.

2.  PREPARING THE COC PROGRAM GRANT APPLICATION

HSSN (the CoC)

The HSSN is charged with design, operation and following a collaborative process for the development of applications and approve the submission of applications in response to a NOFA published by HUD under part 578.19.
HSSN will establish priorities for funding projects in the geographic area of OR-506 CoC.

The HSSN will elect a CoC Collaborative Applicant that will collect and combine the required application information from all applicants and for all projects within the geographic area that the CoC has selected funding. The CoC Collaborative Applicant will also apply for CoC Planning activities.

3. REQUEST FOR PROPOSAL AND RECORDKEEPING

CoC Collaborative Applicant
Elected by the HSSN, the CoC Collaborative Applicant will provide administrative support in coordinating and submitting the application, to include preparing the CoCs funding availability through Annual Renewal Demand (ARD) approved by HUD, reallocation of CoC Program-funded projects, and new CoC Program funds made available by HUD.

The CoC Collaborative Applicant will prepare and publish a Request For Proposal (RFP) with timeline for project proposal presentations, due date of applications, the date of the ranking/rating based on performance outcomes of HUD-Funded OR-506 CoC Programs (see Appendix A, Measuring Performance of HUD-funded CoC Program) and scoring by HSSN for new projects. The RFP will be a public announcement using email, bulletin boards, community forums, and posted on the jurisdiction’s website.

The CoC Collaborative Applicant will schedule presentations of all new projects at the next regular HSSN meeting following the Notice of Funding Available (NOFA) release by HUD, with each agency having one vote (see Appendix B, Project Evaluation Criteria). The CoC Collaborative Applicant will document the ranking and rating process of renewal and new project proposals, and submit the Project Priority List in the CoC Consolidated Application upon approval by the HSSN Workgroup. The HSSN Workgroup will review a summary sheet of the new project scores by agency for each project, and have the opportunity to review the individual detailed score sheets to validate the summary of scores.

Records supporting the grant application process will be retained for five (5) years following the HUD grant award announcement, and will include a summary of new project proposal scores, the Measuring Performance of HUD-funded CoC Programs, rank/rating results, letters or other communication regarding acceptance or rejection of project applications, project applications, and other CoC Program grant application.

4. RENEWAL PROJECT RANKING AND RATING PROCESS

HSSN Workgroup (the CoC Board)
The Workgroup is the administrative body of the HSSN, and responsible for:
  a) Review Annual Performance Reports (APR) outcomes for all CoC Program projects;
  b) Establish priorities for funding projects in alignment with the HSSN review of latest PIT/HIC reporting on homeless demographics and gaps in housing resources;
CoC PROGRAM APPLICATION AND AWARD PROCESS

c) Review projects with non-compliance and/or outstanding on-site monitoring issues and consider reallocation of project funds (see Section 5);
d) Rate project performance using standard performance criterion to include:
   i. 10 points - Housing First (low-barrier access model)
   ii. 3 to 16 points - Target Population
   iii. 8 points – Exits to Permanent Housing
   iv. 4 points – Increase Earned Income from Entry to Annual Assessment/Exit
   v. 4 points – Increase Cash Income from Entry to Annual Assessment/Exit
   vi. 8 points – Maintain or Increase Non-Cash Income
   vii. 5 points – Bed Occupancy on PIT Date
   viii. 5 points – De-obligation of HUD Funds
   ix. Compliance/On-Site Monitoring Outcomes (Pass if all issues addressed/Fail if outstanding compliance issues)
   x. Commitment of Leverage Dollars (excludes 25% cash or in-kind match)
e) Rank projects in order of highest priority for funding being #1 with the lowest priority for funding being the last number in the CoC Program Project Priority List; and
f) Approve the final projects applications for submittal in the CoC Consolidated Plan.

For template of the rating matrix, see Appendix A, Measuring Performance of HUD-Funded OR-506 CoC Programs

5. REALLOCATION PROCESS

HSSN Workgroup (the CoC Board)

Reallocation is the process the CoC uses to shift funds in whole or part from existing eligible renewal projects to create one or more new projects within the CoC annual renewal demand for CoC Program funds. Existing providers are encouraged to apply for new projects through reallocation of their existing projects.

During the comprehensive review of renewal projects, the HSSN Workgroup will use the scoring criteria and selection priorities to determine the extent to which each project is still necessary and address priorities based on System Performance Measurement (SPM) outcomes, gaps analysis and homeless demographic data collected during point-in-time and Community Connect; e.g. ending chronic homelessness, veteran, youth, families with children. The HSSN Workgroup will reallocate funds to new projects whenever reallocations would reduce homelessness or address an underserved homeless population.

To minimize the risk of homeless participant displacement as a result of reallocation, the HSSN Workgroup will approach the reallocation decision as follows:

Current Notice of Funding Available (NOFA)

Determine immediate (current NOFA) reallocation at current grant term ending through reallocation of funds to new project as follows:
a) Project has unresolved on-site monitoring or financial issues outlined in Section 4.c;
CoC PROGRAM APPLICATION AND AWARD PROCESS

b) Project is extreme low performer with points at or below 50 percent of the scoring criteria defined in Section 4.d;

c) Participants can be served by another program within the CoC so as not to create a displacement of program participants; and

d) Project does not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ or the Declaration has expired (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

Note: If a ‘Declaration of Restrictive Covenant’ remains valid and the HSSN Workgroup chooses to reallocate the funds, the Recipient will work with the project sponsor agency (subrecipient) and HUD to determine next steps.

Future NOFA

Determine reallocation need and provide written notice to the project sponsor agency that the program will not be considered for renewal in a future CoC Program funding cycle – provide specific funding cycle that the funds will be reallocated. The HSSN Workgroup will approach the reallocation decision as follows:

e) Project has unresolved on-site monitoring issues – excluding financial issues - outlined in Section 4.c that would not prohibit the project from fully serving the participants;

f) Project is low performer with points at or below 55 percent of the scoring criteria defined in Section 4.d;

g) Project does not serve a priority population and the population may be better served by other community resources;

h) Project sponsor organization needs one additional year to effectively transition participants to new housing and services to minimize displacement of participants; and

i) Project may or may not have a recorded HUD McKinney-Vento ‘Declaration of Restrictive Covenant’ that has not yet expired, and the project sponsor organization needs time to secure alternate financing to ensure compliance (see 24 CFR 578.81 for CoC Program and 24 CFR 583.305 for Supportive Housing Programs).

6. NEW PROJECT RANKING AND RATING PROCESS

HSSN (the CoC)

The HSSN membership will receive presentations on new project proposals with eligible voting members completing the scoring process using the procedure and written standards outlined in Project Evaluation Criteria (Appendix B).

a) Rate project performance using standard performance criterion to include:
   i. 20 points – Critical CoC Project Components; e.g. housing emphasis, capacity to develop and implement the project
   ii. 8 points – Supports the 10-Year Plan and Consolidated Plan
   iii. 12 points – Effectiveness of the Project
   iv. 10 points – Resource Utilization
   v. 5 points – Aligns with Local CoC and HUD Priorities

HSSN Workgroup (the CoC Board)
OR-506CoC Hillsboro/Beaverton/Washington County, Oregon

CoC PROGRAM APPLICATION AND AWARD PROCESS

The Workgroup is the administrative body of the HSSN, and responsible for:

b) Review the project proposal scores from the HSSN membership;

c) Address any concerns raised by HSSN membership through a review with the project sponsor agency to include commitment and capacity to implement the program and serve the target population;

d) Rank projects in order of highest priority for funding being #1 with the lowest priority for funding being the last number in the CoC Program Project Priority List; and

e) Approve the final projects applications for submittal in the CoC Consolidated Application.

7. APPEAL PROCESS

The project sponsor agency (recipient/subrecipient) may appeal the HSSN Workgroup decision for renewal reallocation and/or new project selection as follows:

a) The project sponsor agency will submit a written appeal of the decision to the CoC Collaborative Applicant and the Chair of the HSSN Workgroup.

b) The Chair will convene the HSSN Workgroup (the local CoC Board) to receive and review the appeal statement.

c) The project sponsor agency will attend the meeting to answer questions the HSSN Workgroup may have in reviewing the appeal filed by the project sponsor agency.

d) The HSSN Workgroup will make a decision that will be recorded in minutes, and the CoC Collaborative Applicant will proceed with filing the CoC Program application in accordance with this policy and the determination of the HSSN Workgroup. Should the project sponsor agency seek to appeal the decision to a higher authority, the CoC membership will hear the matter at the next monthly meeting of the Washington County Housing and Supportive Services Network (HSSN).

The HSSN Workgroup’s decision to make reallocation decisions to be implemented in “future NOFA” cycles will minimize displacement and support the transition of homeless participants as well as reduce the need for appeal hearings during a very tight application submittal timeframe.

8. CODE OF CONDUCT AND RECUSAL PROCESS

The implementation of a Code of Conduct for the HSSN, inclusive of the Chair, Co-Chair, Workgroup, and associated Subcommittees, is an essential element that supports the inclusive, collaborative, and objective goals of the HSSN. [CoC Program 24 CFR 578.95]

1. Meetings will be open to the public.

2. Members will provide information that is truthful and accurate.

3. Members will be respectful to others at all times.

4. Decision making process will:
   a. Be made by consensus at scheduled meetings.
   b. For non-funding decisions, all members present will have an option to participate in the voting, e.g. – selection of chair, co-chair, or other general membership decisions.
   c. For decisions involving funding, one vote per member organization and one vote per community at-large member based on a threshold of attendance (see Appendix B).
d. **Conflict of Interest.** Members will withdraw/excuse themselves from participating in decision-making (voting) process concerning awards of grants or provisions of financial benefit to which such member or his/her organization could have a future.

9. **GRANT AWARD PROCESS**

CoC Collaborative Applicant

Upon HUD award announcement, the CoC Collaborative Applicant will notify selected applicants of the pending award, to include notice of any conditions imposed on awards by HUD.

HUD will issue grant agreements in accordance with 24 CFR part 578.23, at which time the CoC Collaborative Applicant will prepare Grant Agreements with project subrecipient for activities administered by the subrecipient.

10. **REVISION HISTORY**

<table>
<thead>
<tr>
<th>Version/Date</th>
<th>Description of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>V0.2013</td>
<td>Original Version</td>
</tr>
<tr>
<td>V1. December 12, 2014</td>
<td>Section 4 include new criteria and scoring for renewal projects.</td>
</tr>
<tr>
<td>V2. June 9, 2017</td>
<td>Section 5 updates recordkeeping to include record retention.</td>
</tr>
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</table>

**APPENDICES**

Appendix A: Measuring Performance of HUD-Funded CoC Programs

Appendix B: Project Evaluation Criteria.
### APPENDIX A

Measuring Performance of HUD-Funded CoC Programs

<table>
<thead>
<tr>
<th>60 POINTS TOTAL</th>
<th>OUTCOME</th>
<th>POINT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 point</td>
<td>Project follows Housing First Model</td>
<td>Yes = 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Partial = 5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No = 0</td>
</tr>
<tr>
<td>16 point</td>
<td>Target Population - Severity of Need and Vulnerability</td>
<td>Chronically Homeless = 16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Veteran Homeless = 16</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Domestic Violence/Human Trafficking = 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Criminal History = 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Active or history of substance abuse = 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mod-BARRIER (RRH/TH) = 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Low-BARRIER (RRH/TH) = 5</td>
</tr>
<tr>
<td>8 point</td>
<td>Exits to Permanent Housing (Goal: 90%)</td>
<td>60% = 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥60% to 79% = 6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥5% to 59% = 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥30% to 44% = 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≤29% = 0</td>
</tr>
<tr>
<td>4 point</td>
<td>Gain or increase Earned Income (Goal: 20%)</td>
<td>21+ = 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥16 to 20% = 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥11% to 15% = 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥6% to 10% = 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≤5% = 0</td>
</tr>
<tr>
<td>4 point</td>
<td>Gain or increase Cash Income (Goal: 54%)</td>
<td>54+ = 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥40% to 53% = 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥21% to 39% = 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥6% to 20% = 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≤5% = 0</td>
</tr>
<tr>
<td>8 point</td>
<td>Increase Non-Cash Income (Goal: 54%)</td>
<td>54+ = 8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥40% to 53% = 6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥21% to 39% = 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥6% to 20% = 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≤5% = 0</td>
</tr>
<tr>
<td>5 point</td>
<td>PIT Bed Occupancy (Goal: 86%)</td>
<td>60+ = 5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥61% to 79% = 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥46% to 60% = 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥31% to 45% = 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥16% to 30% = 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≤15% = 0</td>
</tr>
<tr>
<td>5 point</td>
<td>De-Obligation of HUD Funds (Goal: &lt;%)</td>
<td>&lt;1% = 5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥1% to 1.49% = 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>≥1.5% to 1.99% = 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>&gt;2% = 0</td>
</tr>
<tr>
<td>0 point</td>
<td>On-Site Monitoring Compliance and Fiscal Audit (to include Super Circular 2 CFR 200)</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
<tr>
<td>0 point</td>
<td>Commitment of Leverage ($) (excludes cash and in-kind match $)</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
<tr>
<td>0 point</td>
<td>Data Quality: Timeliness in Entering Data at Exit</td>
<td>Tiebreaker for Ranking and Ratings</td>
</tr>
</tbody>
</table>
### APPENDIX A

<table>
<thead>
<tr>
<th>TIER 1 &amp; TIER 2 IN ORDER</th>
<th>CoC Program Project Title</th>
<th>Need Funding Request (approved GSA)</th>
<th>Tier 2 Request:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>funding</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>planned</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>total</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tier 1 Request: $</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tier 2 Request: $</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>total</td>
<td></td>
</tr>
</tbody>
</table>

Note: OR-506 CoC Meeting
Not a Planned and Funded Project.
# APPENDIX B

## Washington County Continuum of Care (CoC)-OR-506

### PROJECT EVALUATION CRITERIA

#### Scoring Agency:

- Enter agency name based on attendance at CoC Meetings

#### Project Name:

- 

#### Project Sponsor:

- 

#### Date Presented to HSSN:

- 

### Projects proposed for funding under the Washington County Continuum of Care will be evaluated utilizing the following criteria:

#### A. Critical Continuum of Care (CoC) Project Components (0-5 points each):

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The project generates housing emphasis points for the CoC through more than 75% of the budget dedicated to acquisition, construction, rehabilitation, leasing or rent assistance activities</td>
<td>5</td>
</tr>
<tr>
<td>2. The applicant or sponsor demonstrates a commitment to deliver the proposed services to the target population(s)</td>
<td>5</td>
</tr>
<tr>
<td>3. The project sponsor is financially capable of administering the grant and has a history of audit findings and financial management recommendations</td>
<td>5</td>
</tr>
</tbody>
</table>

#### B. How project relates to 10-Year Plan, the CoC & Consolidated Plans (0-2 points each):

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The activity is identified in the Continuum of Care 10-Year Plan and Consolidated Plan</td>
<td>1</td>
</tr>
<tr>
<td>2. The needs of the target population are clearly identified and substantiated</td>
<td>1</td>
</tr>
<tr>
<td>3. The activity aligns with the CoC goals to end chronic homelessness</td>
<td>1</td>
</tr>
<tr>
<td>4. The activity project uses a low-barrier housing-first model for rapid placement into housing</td>
<td>1</td>
</tr>
</tbody>
</table>

#### C. Effectiveness (0-2 points each):

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Project accepts 100% referrals from Community Connect, a centralized entry system</td>
<td>1</td>
</tr>
<tr>
<td>2. Participants are helped to achieve self-sufficiency through employment linkage and access to mainstream resources</td>
<td>1</td>
</tr>
<tr>
<td>3. The project promotes participant choice and interventions are tailored to meet the needs of all members of the household</td>
<td>1</td>
</tr>
<tr>
<td>4. Program participant satisfaction will be collected and used to improve the program</td>
<td>1</td>
</tr>
<tr>
<td>5. Participant data will be collected in HMIS</td>
<td>1</td>
</tr>
<tr>
<td>6. If the project serves homeless families with children, the project sponsor has established policies and designated staff to ensure all children are enrolled in school</td>
<td>1</td>
</tr>
</tbody>
</table>

#### D. Resource Utilization (0-2 points each):

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The applicant clearly identifies the activities for which McKinney-Vento funds will be used</td>
<td>1</td>
</tr>
<tr>
<td>2. The project has direct linkages with other mainstream resources and service programs within the system</td>
<td>1</td>
</tr>
<tr>
<td>3. The project utilizes existing services or complements other program efforts as demonstrated in collaborative partnership(s) with other agencies</td>
<td>1</td>
</tr>
<tr>
<td>4. Other potential or secured funding sources are identified and described</td>
<td>1</td>
</tr>
<tr>
<td>5. The project attracts private funding</td>
<td>1</td>
</tr>
</tbody>
</table>

#### E. BONUS: The project aligns with Local CoC and HUD priorities, as established in the Request For Proposal (RFP).

<table>
<thead>
<tr>
<th>Priority</th>
<th>Max Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Permanent Supportive Housing for Chronic Homeless and Permanent Housing for Individuals and Families coming directly from street or shelter, to include persons fleeing Domestic Violence (Category 4 Homeless Definition)</td>
<td>5</td>
</tr>
</tbody>
</table>

### Total Points:

| Total maximum points possible | 55 |

---

CoC Program Application and Award Process
APPENDIX B

PARTICIPANT VOTING PROCESS:

1. Housing and Supportive Services Network (HSSN) membership is open to any person interested in the issue of homelessness in Washington County.
2. All new and renewal projects are brought before the HSSN for review and prioritization.
3. Project sponsors requesting Continuum of Care funds provide a presentation to the HSSN in accordance with the HSSN Continuum of Care Planning Calendar and will format their presentation according to the Request For Proposal (RFP) standard rating criteria used by the HSSN.
4. HSSN members rate each project using the criteria point system, casting a vote (points) for each project. This evaluation criteria form was reviewed and approved for use by the HSSN in November 7, 2012 (originated January 2006).
5. The voting process (rating and prioritizing of projects) is the work of the HSSN while in attendance at a regular HSSN meeting.
6. Any agency or individual with a conflict of interest will abstain from voting.
7. This open process ensures that the objective rating and prioritizing systems is fair, honest, inclusive, and unbiased. The Participant Voting Process and the Voting System is designed to create an open process within the Washington County HSSN.

VOTING SYSTEM:

1. Adoption of this project evaluation criteria voting system was implemented with the participation and consensus of HSSN members.
2. All agencies/groups/individuals are allowed to vote after attending a minimum of 8 meetings in a 12-month period (July to June).
3. Only one (1) vote per agency/group. Individuals not associated with an agency or group will have one (1) vote each.
4. A HSSN Work Group meeting is scheduled, at which time the HSSN Work Group tallies the votes and ranks the project on the Project Priorities Chart based on its score and in alignment with the goals and strategies outlined in the Federal Strategic Plan “Opening Doors” and the Washington County local 10-Year Plan to End Homelessness “A Road Home.” Project Sponsors are invited and encouraged to attend this meeting.

NOTE:

Final project priority selection will be performed by the HSSN Workgroup (the CoC Board). The project proposal applications will be reviewed to include the scores and comments received on new project proposals. The HSSN Workgroup will complete the ratings and selection processes for projects moving forward in the competition, and rank projects in priority order.

See CoC Program Application and Award Process, policy # 578.9-OR506CoC for additional details available online at www.co.washington.or.us/homeless.
HMIS GOVERNANCE CHARTER

Policy Authority: This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN). The CoC Governance Policy 578.5-OR506CoC identifies the roles and responsibilities of the CoC.

Purpose: The term Homeless Management Information System (HMIS) refers to the information system designated by the CoC used to record, analyze, report, and transmit client and activity data in regard to the provision of shelter, housing, and services to individuals and families who are homeless or at risk of homelessness.

Standard: The HSSN is responsible for selecting HMIS software, designating the HMIS Lead to manage the system, provide oversight for key HMIS policies, work with the HMIS Lead to ensure CoC achieves high participation rates among projects that serve persons experiencing homelessness, and use the data in HMIS to support planning and operational responsibilities.

Scope: Homeless Provider Agencies, recipients and subrecipients of CoC Program and Emergency Solution Grant (ESG) funds, the HMIS Lead Agency, and the CoC Collaborative Applicant.


Note: Pending update for 2017 HMIS Data Standards that will be effective 10/1/2017

Responsibilities:

Note: This policy is adopted by the HSSN using the HMIS proposed rule 24 CFR 580. This HMIS Governance Charter will be updated to include the HMIS final rules with specific details applicable to HMIS technical standards, security standards, data quality standards, and data collection requirements to allow for flexibility in adapting to changing technology and new program requirements.

1. HMIS DESCRIPTION
In May 2006, the HSSN selected ServicePoint software and the Washington County Department of Housing Services as the HMIS Lead Agency for the geographic region covered by OR-506 CoC Hillsboro/Beaverton/Washington County, Oregon.
Washington County subsequently entered into a partnership with NW Social Service Connections (NWSSC), owned and operated by the Portland Housing Bureau (PHB) with the City of Portland to create a regional HMIS implementation. Since that time, additional localities throughout the State of Oregon joined the implementation. By 2012, all State of Oregon HMIS jurisdictions had joined the original implementation, making it a statewide HMIS using ServicePoint.

The HMIS system will:
- Produce an unduplicated count of persons experiencing homelessness;
- Describe the extent and nature of homelessness locally, and provide aggregate data for regional, state and national reporting;
- Identify patterns of service use by at-risk and homeless populations; and
- Measure program and system-level performance.

Appointed by the HSSN, the Washington County Department of Housing Services is the jurisdiction’s CoC Collaborative Applicant. Washington County coordinates the use of HMIS data for evaluating program and system outcomes, analysis of resource gaps, prepare local and federal reporting on homeless demographics, and prepare the federal McKinney-Vento Homeless Assistance grant application.

2. RESPONSIBILITIES ASSIGNED TO THE COC FOR HMIS IMPLEMENTATION

The HSSN will:

a) Select HMIS software for the geographic area covered by the CoC.
b) Designate an eligible HMIS Lead Agency to be responsible for managing the CoC’s HMIS.
c) Review, revise and approve a privacy plan, security plan, and data quality plan for the HMIS and incorporate into the CoC’s Governance the policies and procedures needed to implement these plans and comply with other HMIS-related requirements identified.
d) Ensure consistent HMIS participation.
e) Ensure that the HMIS is administered and implemented in compliance with the requirements established by HUD in 24 CFR Part 580.

The HSSN will use HMIS to:

f) Support community-wide planning to identify gaps in meeting the needs of a diverse homeless population that includes cultural and linguistic competencies;
g) Track progress in meeting CoC and project-specific performance goals;
h) Identify how best to direct resources to prevent and end homelessness;
i) Perform screening and assessment within Community Connect, the CoC’s centralized assessment system;
j) Complete the competitive McKinney-Vento CoC Program Homeless Assistance grant application;
k) Meet HUD reporting requirements, to include the required Annual Performance Report (APR) for all HUD-funded programs, the Annual Homeless Assessment Report (AHAR) submitted to the U.S. Congress;
1) Complete the homelessness components of the Consolidated Plan;

m) Report outcomes and challenges for *A Road Home: 10-Year Plan to End Homelessness in Washington County*;

n) Document the CoC’s qualifications as a high-performing community; and

o) Enter into a CoC and HMIS Governance Memorandum of Understanding defining responsibilities between the HSSN (the CoC) and the HMIS Lead Agency. Refer to Appendices for copy of signed CoC and HMIS Governance Declaration of Roles and Responsibilities.

3. **HMIS TECHNICAL PRIVACY, SECURITY AND DATA QUALITY STANDARDS**

Current applicable HMIS standards include:


**Technical Requirements (24 CFR 580.33)**

HMIS Lead Agency and the HMIS vendor are jointly responsible for ensuring compliance with the technical standards. The HSSN will implement uniform technical requirements for HMIS and proper data collection and maintenance of the database to ensure the confidentiality of the information in the database. Data entry will follow standards on participation, data collection, and reporting under the local Servicepoint HMIS and comply with 24 CFR part 578.57(a)(3).

**Privacy and Security Requirements (24 CFR 580.35)**

Security standards are directed to ensure the confidentiality, integrity, and availability of all HMIS information, protect against any reasonably anticipated threats or hazards to security, and ensure compliance by end users.

At a minimum, Washington County and all Covered Homeless Organizations (CHO) designated will comply with the following:

- **Security Plan.** The NW Social Service Connections CMIS/HMIS Policies and Procedures. Refer to the HMIS Manual for details.

- **Administrative Safeguards.** The administrative actions, policies, and procedures required to manage the selection, development, implementation, and maintenance of security measures to protect HMIS information, at a minimum will meet the following:
  1. Security Officer - A designated security officer ensuring compliance to standards.
  2. Security Awareness Training and Follow-up – CoC HMIS Lead will provide annual training to CHO and CoC.
  4. Disaster Recovery Plan – Protocol for communication with staff, CHO and COC.
  5. Annual Security Review – HMIS Lead will complete annual review using security checklist.
  6. Contracts and other arrangements – Lead will administer and retain copies of all contracts and agreements executed as part of the administration and management of the HMIS.
The CHO will comply with any Federal, State and local laws requiring additional confidentiality protections, including but not limited to:

- The Health Insurance Portability and Accountability Act (HIPAA) of 1996 (45 CFR parts 160 and 164)
- The Confidentiality of Alcohol and Drug Abuse Patient Records Rule (42 CFR part 2)
- Violence Against Women and Department of Justice Reauthorization Act. Victim service providers are exempted from entering data directly into a CoC’s HMIS because of privacy and confidentiality considerations. While they may be exempt from direct client-level data entry into HMIS, victim service providers still must keep required data in a comparable database.
- CoC Program and ESG-funded recipients and subrecipients will follow written procedures to ensure confidentiality of data for both HMIS and comparable databases in accordance with 24 CFR Part 578.103(b)(i).

**Data Quality Standards and Management Requirements (24 CFR 580.37)**
The data quality standards ensure the completeness, accuracy, and consistency of the data in the HMIS. The CoC is responsible for the quality of the data produced.

HMIS Lead will develop and implement a Data Quality Plan and set data quality benchmarks for Covered Homeless Organizations (CHO) for “Lodging” providing overnight accommodations and “Non-lodging” projects that do not provide overnight accommodations.

The HMIS is capable of producing reports required by HUD to assist the HMIS Lead in monitoring data quality.

### 4. APPENDICES
Appendix A: CoC and HMIS Governance Declaration of Roles and Responsibilities

### REVISION HISTORY

<table>
<thead>
<tr>
<th>Date</th>
<th>Description of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/3/2015</td>
<td>Amend Appendix A to include new Co-Chair signature.</td>
</tr>
<tr>
<td>4/14/17</td>
<td>Amend Section 3 to update 2014 HMIS Data Standards.</td>
</tr>
</tbody>
</table>
CoC AND HMIS GOVERNANCE
DECLARATION OF ROLES AND RESPONSIBILITIES

Names of Parties Referenced Below:
- Hillsboro/Beaverton/Washington County OR-506 Continuum of Care is a community consortium under the governance of the Housing and Supportive Services Network (HSSN), hereinafter referred to as CoC.
- Washington County Department of Housing Services hereinafter referred to as WCHS.

Recitals:
- The CoC is the primary decision-making body for HUD funded programs for homeless people in Washington County, Oregon.
- The CoC has determined that WCHS will be the CoC Lead Organization and the HMIS (Homeless Management Information System) Lead Organization.
- The U.S. Department of Housing and Urban Development requires all recipients of Federal funds under the Stewart B. McKinney Homeless Assistance Act, as amended by the HEARTH Act, to participate in a Homeless Management Information System (HMIS).
- HMIS is a community-wide computer software application that is designed to capture client-level information including the characteristics of men, women, and children experiencing homelessness and the housing/services provided to them.
- CoC has chosen ServicePoint software by Bowman Systems LLC as the HMIS product.
- WCHS has entered into a contract for HMIS software with the City of Portland, administered by the Portland Housing Bureau. This contract enables the CoC to participate in a state-wide HMIS implementation of ServicePoint administered by Portland Housing Bureau using.

1. Responsibilities of CoC:
   a) Oversight of the HMIS system in Washington County.
   b) Designation of the CoC HSSN Work Group as the group that will track HMIS implementation and performance.
   c) Enforce compliance that all CoC Program and Emergency Solution Grant (ESG) project recipients and subrecipients participate fully in HMIS, and encourage and support non-HUD funded projects to participate in HMIS.
   d) Ensure accurate data reporting in the CoC Program Homeless Assistance grant application utilizing HMIS data.
   e) Ensure that the HMIS projects receive a priority funding status in the CoC's Priority List in the CoC Collaborative Application submission to HUD.
   f) Require annual HMIS data submission in the HUD Annual Homeless Assessment Report (AHAR), Point-In-Time (PIT) Count and Housing Inventory Chart (HIC) for all Emergency Solution Grant and CoC Program projects.

2. Responsibilities of WCHS as HMIS Lead Organization:
   a) Function as System Administrator for the HMIS in Washington County.
   b) Monitor HMIS security at user and system level.
   c) Provide group and individual training to HMIS users in Washington County.
   d) Provide individualized technical assistance to HMIS users in Washington County.
   e) Assist CoC recipient and subrecipient(s) with specialized reporting needs.
   f) Monitor and promote data quality on a monthly basis.
   g) Recommend continuum-level mechanisms for monitoring and enforcing compliance with approved policies and procedures.
   h) Produce quality data in compliance with Federal reporting, to include the Annual Homeless Assessment Report (AHAR), Point-In-Time (PIT) count and the Housing Inventory Chart (HIC).
   i) Ensure that pertinent HMIS monitoring is included in the CoC's annual site visit of grantees.
   j) Function as the Washington CoC's liaison to the Regional HMIS Implementation effort.
APPENDIX A

k) Ensure compliance with the Portland Housing Bureau contract.
l) Participate in the statewide HMIS System Administrators' Work Group.
m) Collaborate with WCHS CoC Lead staff on CoC data needs.
n) Generate data necessary for CoC Collaborative Application.
o) Provide grant administration functions for the CoC's dedicated HMIS grant:
   1. Prepare data for annual renewal grant application;
   2. Identify and secure grant match and leverage funding;
   3. Track grant expenditures throughout the project year;
   4. Prepare HUD Annual Performance Report (APR) for HMIS dedicated project;

3. Responsibilities of WCHS as CoC Lead Organization:
   a) Provide staffing to the CoC to ensure a sustainable infrastructure.
   b) Coordinate the planning efforts of the CoC.
   c) Organize and advertise CoC meeting schedules.
   d) Ensure distribution and record maintenance of CoC documentation; e.g. meeting minutes, policies, annual work plans in support of the 10-Year Plan, documents.
   e) Coordinate, complete, certify and submit the CoC Collaborative Application.
   f) Coordinate with WCHS HMIS lead staff on CoC data needs.

---

**Housing and Supportive Services Network (Washington County CoC) Policy and Procedure Review Certification:**

Annette M. Evans
CoC Chair
Homeless Program Coordinator, Washington County Department of Housing Services (public agency)

Katherine Gallian
CoC Co-Chair
Grant Manager, Community Action Organization (nonprofit agency)

---

**Washington County Department of Housing Services Policy and Procedure Review Certification:**

Adrian Yaffre, Jr.
Director, Washington County Department of Housing Services

---

**Revision History**

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<td>12/14/2012</td>
<td>2.0</td>
<td>Amended to include HEARTH Act language, revised Portland Bureau of Housing &amp; Community Development (BHCD) to read Portland Housing Bureau (the statewide HMIS Lead), and add reference to CoC Program and Emergency Solution Grant.</td>
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<td>06/03/2015</td>
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<td>Amendment to include signature of newly elected CoC (HSSN) Co-Chair.</td>
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CoC OR-506
HMIS User Manual

Including Policies, Procedures and Notices

This document contains data entry procedures for the ServicePoint HMIS Database as used in CoC OR-506.
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Appendix 1 - NWSSC/WCDHS HMIS Agency Participation Agreement 2017
## REVISION HISTORY

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<td>V2.1 8/31/2017</td>
<td>Edit Table of Contents Headings and inclusion of introduction information</td>
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ServicePoint Basics
HMIS is a locally administered, electronic data collection system that stores longitudinal person-level information about persons who access the service system. ServicePoint (trademarked and copyrighted by Mediware Information Systems) is a web based management information system that allows agencies and community continuums to manage (real-time) client and resource data. ServicePoint provides client, service and referral tracking, case management, agency and program indexing, and reporting.

Accessing and Using ServicePoint
In order to access ServicePoint, a licensed, authorized user must first attend HMIS 101- Basic Training. After attendance to training, including Privacy & Security, the following will be sent to the user:

1. User Name
2. Temporary Password
3. ServicePoint web address
4. PKI Certificate with instructions
5. Training Certificate

Passwords
Upon first login, there will be a prompt to reset your password after entering your temporary password. Passwords are only valid for 45 days and prompting to reset will be given upon login at that time. A user can reset their password at any point by completing the following:

1) Log into ServicePoint.
2) In the upper right corner, to the right of your name, click on the little gear.
3) Scroll to the bottom of the popup.
4) Click on Change Password and follow the prompts.
5) Save and exit.

Incorrect entry of passwords upon login can occur only three (3) times before ServicePoint will lock you out. Contact WCDHS HMIS Agency or System Administrator to reset your password.

Using the EDA Function
When entering data into HMIS there are different ways of identifying which provider entered the data. This can affect reporting. A very common way of ensuring proper data entry is by entering data as the provider for which you are entering the data. Most agencies have a “parent” or “umbrella” provider under which all their projects have their own HMIS provider. Example:

Luke-Dorf, which has its parent Luke-Dorf provider, but also has separate HMIS providers under the Luke-Dorf provider for Safe Haven, SPC, etc. A Luke-Dorf employee who also serves as a Community Connect Assessor will have EDA rights to Community Connect to differentiate between Luke-Dorf data and Community Connect data. If your agency determined that client data be entered via the project EDA, click on the Enter Data As link in the far upper right of ServicePoint (right under your name) and select the specific provider for which data will be entered. If you are unsure whether this applies to you, consult with your agency or system administrator.
Visibility
The initial implementation of ServicePoint for OR-506 was created without data sharing amongst agencies. This means that an agency's data, from clients created to case notes, was visible only to HMIS users within that agency, or to select other agencies or projects with a signed Release of Information (ROI). NWSSC and this CoC have been moving toward a shared data environment, but this brings challenges as well. Previously, one client could have several client records created by different agencies; now we are merging those clients, which means duplicated and sometimes invisible data to some users. If you are working in a client record and you cannot see data you know is there, or if you see records that you believe should be merged, please contact your Agency or System HMIS administrator.

Date Stamping
When entering data into ServicePoint, it's important to remember that it is entirely driven by dates and visibility; everything is visible or counted based on the date and the visibility settings for which the data was entered. When a report is run, one of the parameters set is the dates. This tells ServicePoint to only look at the specified type of data (entry/exit, services, etc.) that was entered between the given dates. Entering data from entry, exit, or interim automatically timestamps the data to the date of the entry, exit, or interim.

1) When a client enters a project, the data needs to be entered in alignment with the date of the project entry. The same goes for data entered at Interim or Exit. This means that when an entry, interim or exit is created, it needs to have the correct date entered in order to ensure all HUD Universal Data Elements (UDEs) have the entry date on them, as required by HUD for reporting, and that the data needs to be entered from that entry, interim or exit (not from the Assessments, Client, or Profile tab). Once the data is entered, it should not be changed for the entry date unless it is found to have been in error as of the date it was entered. See Changing Data, Assessments: Entry Exit and Interims. **Once data is entered, unless it is found to be incorrect, it is not to be changed or overridden for the date it is entered.**

2) Anytime there is an update or change (as opposed to a correction) to the client information, enter this data only at interim or exit with the correct date in which the new information is valid

Changing Data
Along with shared data comes the question of what constitutes an agency's data, and who should change what in HMIS. Two key areas of entering client data exist:
*Client Record Tab
*Assessments

CLIENT PROFILE TAB
In this example, a client is created with the Race entered as white, and a year later, at another agency, he claims to be Asian, which is correct. How should this be tracked in HMIS? This continuum has adopted the following guidelines. If an HMIS user for a specific provider finds that an error has been made in the client record or demographics portion of the Client Profile, and they have proof (client ID, SS card, or a signed document) that the prior data is incorrect, there are some steps to take to ensure data quality and integrity.

Client Has Single Agency Provider
If the provider for which the HMIS user works is the only provider from which the client has received services for the past two years, the user can correct the incorrect data.

Client Has 2 or more Agency Providers

8/30/2017
Version 2.1
If another provider has entries or services tracked within the last two years, the user is to contact the other agency(ies) and explain the situation, with the goal being that the incorrect data is corrected by an HMIS user from the provider that entered it. The two HMIS users must agree on what the information should be, and who should fix the data, if appropriate. Be sure to backdate to the agreed-upon date for the change.

If the data literally changed (legal name, for example), the user whose agency is providing services at the time will update the data for the date at which the change became valid, emailing the updates to all other providers from which the client received assistance in the past two years.

**ASSESSMENTS: Entry, Exit, Interims**

There is also client data that is shared amongst providers that is not entered via the client profile tab, but via assessments done at entry, exit and interim. Generally, making changes in these assessments, when data is wholly shared and updates are done correctly by going in through the entry, exit or interim, will update all providers’ client records for the client in question. As visibility is cleaned up and standardized in the CoC HMIS provider settings, changes made in this way will be visible to all providers as well as data on which HMIS user actually made the changes. Therefore, when existing data is updated via project entry, exit, or interim, the following guidelines will be used.

*Note – Some client demographic information can be entered via both the assessment and the Client Profile. Any changes to the demographic data (name, DOB, SSN, race, ethnicity) need to follow the procedure noted above for data entered via the Client Profile tab, including notification/consultation with other providers).*

**Client Has Single Agency Provider**

If the HMIS provider for which you are entering data is the only provider in which the client is currently enrolled, updates should be made via edits to the entry, exit, or interim.

**Client Has 2 or more Agency Providers**

If there is another provider working with the client at the time you are completing the entry, exit, or interim, and your information is different from what they entered, contact that other provider and let them know what is being updated for the client.
Basic Data Entry
This guide walks through the basic data entry process for both Entry/Exit projects and ShelterPoint.

Create the Client/Head of Household (Entry/Exit Projects and ShelterPoint)
The household creation process is the same for Entry/Exit projects and projects that use ShelterPoint.

1) Log in to ServicePoint. Click on ClientPoint on the left side menu.
2) Enter the Client’s/Head of Household’s (HoH) name and click Search.
3) If a match is found, bring up the record by clicking on the client name (or the pencil to the left).
   a) Sometimes names are misspelled. Try variations of the name and just the first few letters if you think the client should already be in ServicePoint.
4) If no matches are found (or the match is not correct), continuing entering the client demographic information, full name, social security number, etc.
5) Search one final time to ensure the client is not already in ServicePoint.
6) If no match is found, click Add New Client with this Information.
   a) Note: some clients have more than one record with different spellings. This reduces both efficiency and accuracy of reporting, so be sure to search different spellings.
7) A pop-up will ask if you have looked at all possible matches. If you have, click OK.
8) Click on Client Profile tab and click on the pencil to the left of Client Demographics to finish entering their basic information.

Household Creation (Entry/Exit Projects and ShelterPoint)
9) Next, click the Households tab, and click Search Existing Households.
10) Once you have completed a thorough search for the Household and its current composition for the client has not been found, client on Add Household.
11) The Add New Household window will pop up. Indicate the household type on the drop down at the top of the page. If there are additional household members, repeat steps 2-4 to search for and then add all of the members of the household. Once finished adding all household members, click Continue.
12) You will now be in the Household Information window. Set Head of Household to Yes for the Head of Household and then indicate the relationship the other members have to the Head (i.e. son, daughter, wife, husband, etc.).
13) Set the Joined Household Date to a date equal to, or prior to, the family’s entry to your project (easy way to do it – use the first day of the month of project entry).
14) When done, click Save & Exit.
15) Return to the Summary or Households tab and you should see the household members listed.

Entry Data for Entry/Exit Projects
1) Under the Entry/Exit tab, or Entry/Exit on the Summary tab, click Add Entry/Exit.
2) At the top of the Entry Data screen, check the box next to the household type to include all family members that are to be included in the entry.
   a) Note – if two of four HH members, for instance, want to enter into a project, but the actual HH composition hasn’t changed, do not create a new HH. Instead, only select those members for whom the project entry applies, per the client.
3) Select the Entry Provider and Entry Type (note – entry type depends on project funding and decisions made by your agency; check with your agency administrator if you are unsure).
4) Enter the entry date and time.
5) Click Save & Continue.
6) You will then be at the Entry/Exit Data window.
7) Complete the Entry Assessment for the Head of Household. Answer all questions to the best of your ability with the information given to you by the client.
   - Note - “Don’t Know” and “Refused” means the client does not know, or refused to provide the information, not that you do not know or didn't ask.
   - Note - Questions in red need to be answered every time as they apply to documented HUD information. Any Data Not Collected, Incomplete, or blank (null) response counts against your project and the continuum of care. If you are a HUD-funded project, these questions must be asked upon project entry.
   - Note - A client is able to provide documentation in regard to chronic homelessness within 45 days of entry. For detailed information on how to enter the questions in red regarding situation prior to project entry, please see the section below titled Chronically Homeless Instructions.
   a) Any main question preceding a sub-assessment or question within the sub-assessment for which there is not documentation needs to be answered with a “No”.
   - Note - If you have indicated on the sub-assessment main question that the client does or does not have any of the criteria located within the sub-assessment, the contents of the sub-assessment must match that response, i.e. if there are no documented disabilities, then the question “Does the client have a disabling condition?” must be answered “No.” The same is true for the reverse
   b) When completing the four sub-assessments (Income, Non-cash, Disability and Insurance), the easiest way to enter the data on a client for whom the data has not previously been entered (which will be obvious due to a red triangle with an exclamation point on the far right of the sub-assessment) is to click on the HUD Verification link to the right, click No at the top of the pop-up window, and then manually enter any criteria which is true for the client. The date of the entry, exit, or interim review you are entering should be used as the date, and will auto-populate if you go in through that link.
   c) If there is already a green check mark for the HUD Verification, you must go into the sub-assessment via the magnifying glass on the upper left of the sub-assessment.
   d) You may also enter the sub-assessments via the magnifying glass to the left of the sub-assessment, and sort the responses via the column headings.
   - The Disabilities sub-assessment now has an option for Both Drug and Alcohol abuse. Leave this as “No” regardless if whether the client has both conditions.
   - All questions must be answered for the disabilities sub-assessment.
   - In the Non-Cash Benefits sub-assessment, please do not enter a yes for Section 8 etc. This is only for literal Section 8 clients, which are administered by the county.
9) When the Head of Household’s entry information has been completed, if it is a single person household, click Save & Exit. If there are additional family members, click Save and follow the remaining steps.
10) Scroll back to the top of the Head of Household’s entry assessment.
11) Click the Add Household Data button on the right side, near the top.
11) The Household Data Sharing window will open.
12) Check the box next to the household type to select all household members.
13) Click Save & Exit at the bottom of the Household Data Sharing window. This will copy commonly shared information to all selected household members.
14) You will then be returned to the Entry/Exit Data window. Click on the next family member listed on the left side of the screen, under Household Members. This will bring up the entry assessment for that person.
15) Complete the assessment for all family members. Once this is completed for all family members, click Save & Exit.

**Exits for Entry/Exit Projects**

1) Search for Client/Head of Household.
2) From the Entry/Exit tab, or the Entry/Exit on the Summary tab, click the pencil next to the blank Exit Date.
3) The Edit Exit Data window will open.
4) Check the box next to the household type to select all family members (or, if the whole family is not exiting, for those family members who are exiting).
5) Indicate the date of exit, the reason for exit (Note – do not select anything ending in HOPWA unless your project is HOPWA funded), and the destination.
6) Click Save & Continue.
7) Update information on the Exit Assessment, including all sub-assessment data, to reflect the client's situation at exit and click Save.
   - For example, if the client is leaving to subsidized housing and now has a job, the exit should reflect that they are no longer homeless, have income, and have a voucher:
8) Note – use Add Household Data on the exit screen to update the housing and homeless status of all family members, just like you do on the Entry Assessment.
9) When done, click Save and complete the exit assessment for all family members (listed on left side of screen). When updates have been completed for all household members, click Save & Exit.

**Interim Reviews/HUD Verification**

*If completing an SPC program entry, review Shelter Plus Care before entering into HMIS.*

CoC Program regulations require that client information be entered upon project entry, and updated at least annually thereafter for clients served for at least a year. In ServicePoint, the mechanism to enter these is called **Interim Reviews**. These are meant to be used during project participation to update any criteria noted on the Interim Assessment that has changed since the last Assessment. **Follow-ups** are meant to be used after project participation, to track client success after project exit. These instructions will focus on using the **Annual Assessments** function in ServicePoint.

1) Log in to ServicePoint, Search for Client/HoH and click on the Entry/Exit tab.
2) On the Entry/Exit tab, click the Interim icon (looks like paper) for your project.
3) Click the Add Interim Review button and check off all family members and indicate the review type and the date the review is effective. Click Save & Continue
   - For Annual Assessments, this is the anniversary date of entry into the project.
4) On top of the Interim Review assessment, you’ll see the review date and time. All information you enter in this assessment will be date stamped with this date and time, with the exception of information in the four sub-assessments. If you need to change a client's income, disabilities, non-cash benefits or insurance, be sure to set to the correct date.
5) If client information has changed, update the assessment and be sure to set to the correct date within the sub-assessment. Enter the sub-assessment by clicking on the magnifying glass to the top left and update the line items as necessary.
   - If a line item changes, you must enter an end date for the previous open item and add a new line item. Complete the changes in each sub-assessment.
CoC OR-506 ServicePoint HMIS User Manual

- If another agency has an open project enrollment for this client, consult with them prior to changing/updating client information in the interim assessment, particularly if there is a need to end a line item the other agency created.
- Due to client merges, you may see more than one open line item in the sub-assessment. Check with your Agency Administrator to ensure that there is no conflicting data for a specific line item. Extra No line items are fine unless they conflict with an open Yes.

6) Review the rest of the assessment and update as needed. Click Save when done with the first household member’s update.

7) If there are more people in the household, they will be listed on the left side of the Interim Review window. Once the assessment has been saved for a family member, the checkmark will turn green. A gray check means the review has not yet been completed for that family member.
- Click each family member and update the assessment and for them. If there are no changes, still click on each person and save to complete the required review for all family members. Use the Interim feature to update client data at any time using Unscheduled Interim while the client is enrolled in your agency.

Annual Income Review for Legacy Shelter Plus Care (SPC) Projects
The Annual Income Review date (HMIS Interim Review) for SPC clients must be the anniversary date of the original program entry date as established in the CoC Program Administration and Monitoring Policy No. 578.103-OR506CoC, Policy Title CoC Program Administration and Monitoring.

To assist agencies in accurate data entry, Washington County has provided two tools; the Annual Income Review Spreadsheet and the YARDI HMIS Information Sheet. The Annual Income Review Spreadsheet is provided to each agency to assist in tracking SPC entry, exits and interims.

![Table](image)

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Admission Date is the official date of entry based on Housing Assistance Payment, and the report can be sorted by Monthly Update to assist in preparing for annual updates. The 2016 and 2017 Done columns are for tracking when the Update is completed for the year.

The other tool is the YARDI HMIS Information Sheet, which is prepared by the Occupancy Specialist and will be uploaded into the Client Profile in HMIS by the System Administrator. This tool will be used to determine the verified income and types. **If the information provided does not match information you have verified regarding the client, please contact the Occupancy Specialist.**
*Note: The YARDI database used by the Department of Housing Services only reports the data below, and in the way shown. Please use the descriptors in the SSN and Income Type columns for reference. Non-cash benefits and HUD Universal Data Elements are rarely included on this form, so it is essential that the agency Case Manager or Intake staff collects this data.

**Entry Data for ShelterPoint Check-In Projects**
1) After creating the household as explained above, go to ShelterPoint and select your shelter and bedlist. Then click Client Check-In.
2) Click on the bed you will assign to the Head of Household. Search for your client (or enter the client ID number).
3) Click the green plus next to the client’s name to assign them the bed.
4) You will then be in the Unit Entry Data screen for the Head of Household.
5) At the top of the screen, indicate the check-in date and time for the household. It will default to the current date and time.
6) Scroll down to Household Members.
   a) Click Assign Unit to assign a bed to each member of the household that is to be included in the check-in. Be sure to assign a bed in the same room as the HoH.
   b) Check off all household members to be included in the check-in.
7) Scroll down to Entry Data and assign the appropriate provider and provider type.
8) Complete the Entry Assessment for the Head of Household. Answer all questions to the best of your ability with the information given to you by the client.
   • Note - “Don’t Know” and “Refused” means the client does not know, or refused to provide the information, not that you do not know or didn’t ask.
   • Note - Questions in red need to be answered every time as they apply to documented HUD information. Any Data Not Collected, Incomplete, or blank (null) response counts against your project and the continuum of care. If you are a HUD-funded project, these questions must be asked upon project entry.
   • Note - A client is able to provide documentation in regard to chronic homelessness within 45 days of entry. For detailed information on how to enter the questions in red regarding situation prior to project entry, please see the section below titled *Chronically Homeless Instructions.*
   e) Any main question preceding a sub-assessment or question within the sub-assessment for which there is not documentation needs to be answered with a “No”.
      • Note - If you have indicated on the sub-assessment main question that the client does or does not have any of the criteria located within the sub-assessment, the contents of the sub-assessment must match that response, i.e. if there are no documented disabilities, then the question “Does the client have a disabling condition?” must be answered “No.” The same is true for the reverse.
   f) When completing the four sub-assessments (Income, Non-cash, Disability and Insurance), the easiest way to enter the data on a client for whom the data has not previously been entered (which will be obvious due to a red triangle with an exclamation point on the far right of the sub-assessment) is to click on the HUD Verification link to the right, click No at the top of the pop-up window, and then manually enter any criteria which is true for the client. The date of the entry, exit, or interim review you are entering should be used as the date, and will auto-populate if you go in through that link.
   g) If there is already a green check mark for the HUD Verification, you must go into the sub-assessment via the magnifying glass on the upper left of the sub-assessment.
   h) You may also enter the sub-assessments via the magnifying glass to the left of the sub-assessment, and sort the responses via the column headings.
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- The Disabilities sub-assessment now has an option for Both Drug and Alcohol abuse. Leave this as "No" regardless if whether the client has both conditions.
- All questions must be answered for the disabilities sub-assessment.
- In the Non-Cash Benefits sub-assessment, please do not enter a yes for Section 8 etc. This is only for literal Section 8 clients, which are administered by the county.

9) When the Head of Household’s entry information has been completed, if it is a single person household, click Save & Exit. If there are additional family members, click Save and follow the remaining steps.

10) Scroll back to the top of the Head of Household’s entry assessment.
11) Click the Add Household Data button on the right side, near the top.
12) The Household Data Sharing window will open.
13) Click Save & Exit at the bottom of the Household Data Sharing window. This will copy commonly shared information to all selected household members.
14) You will then be returned to the Entry/Exit Data window. Click on the next family member listed on the left side of the screen, under Household Members. This will bring up the entry assessment for that person.
15) Complete the assessment for all family members. Once this is completed for all family members, click Save & Exit.

Check-Outs for ShelterPoint Projects

1) Go to ShelterPoint. Select your shelter and bed list.
2) Click Client Check-In.
3) Locate the Head of Household on the bedlist and click the red minus symbol icon on the left side of the screen (note – when hovered over, the text Check Out will appear).
4) The Unit Exit Data window will pop up.
5) Indicate the date and time of check-out at the top of the screen (note it defaults to the current date/time).
6) Select the reason for leaving and destination. (Note – do not select any items ending in HOPWA unless your project is HOPWA funded).
7) Under Household Members, check the box next to the household type to select all members of the household, or if check out doesn’t apply to all household members, select only those to whom it does apply.
8) Update the Exit Assessment for the Head of Household, if there is one assigned. If there isn’t one, go to step 9. The data on the Exit Assessment should reflect any changes that have happened (i.e. housing status, income, non-cash benefits, etc.) since the last Annual Assessment. When done, click Save.

9) Note – use Add Household Data on the check-out screen to update the housing and homeless status of all family members, just like you do at project entry!

10) When done, click Save & Exit.
11) You will return to your bedlist and the beds will now show EMPTY.
12) Note – if anyone other than the head of household had changes in income, disabilities, insurance or non-cash benefits that need to be recorded for the exit, go to the Summary tab or Entry/Exit tab and click on the pencil next to the exit date. Click on the family member’s name on the left side and then update their exit information.
Modifying HHs
When HH Type changes, you will need to create a new HH.
Due to various funding sources for our CoC (Specifically CSBG), it is important to preserve the HH types of existing HHs. Though your project or program type may not have a specific funding stream, it is important to have a unified data entry process to ensure high data quality for all of the projects/programs with in the CoC. Therefore, if you have to modify an existing HH:

1. If by modifying the HH, you won't affect the HH type, it is ok to proceed with adding or exiting HH members (See Adding (or exiting) HH members in the next section).
2. If by modifying the HH (adding or exiting HH members), you have to change the HH type, leave the existing HH the way it is and create a new one that reflects the new HH configuration. See below.

1) In ClientPoint, enter the client record for which the changing HH (client Search by either name, etc. or Client ID #).

2) Select Client for whose HH will be changing by clicking on the Name in Client results

3) In the Client Profile, you can click on the Pencil (edit icon)

This will bring you directly to the HouseHold Information pop-up:
4) a). Clicking on the Red Circle Icon to delete the HH member from the existing HH. This option allows you to select the exit date.

b.) Or, you can click Add/Delete HH Members:

This option does not give you the ability to choose an exit date from the HH. ServicePoint will enter the exit date from the HH as the same day you are entering data.
5) Be sure to complete for all HH members that will be in the new HH configuration and you will see the Previous HH Members below once deleted.

6) You will then click Save & Exit on the Household Information pop-up (either will do).
7) While still on the HouseHold Tab, click Search Existing HouseHolds, if you are adding this client to a preexisting HH without changing the HH Type of the HH to which you are adding this person. You may continue with the instructions of “Adding HouseHold members to a HouseHold (HH)”. Otherwise, click Start New Household.

8) Select appropriate HouseHold Type as well as complete client search (Advanced Client Search shown here). Click Search
   a. Note the prefill of as much demographic data as possible as the client may not be found on the client search. This increases data that is auto populated in the individual client profile when you complete this step
9) If no matches are found within Client Results, click on Add New Client With This Information. If the match is found under Client Results, click to Green Circle with the plus sign to add this person to the HH. When you Add New Client With This Information, it will, again, ask you if you are sure, as a failsafe.
10) There are now two Selected Clients. Click on Continue to continue with new HH creation.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Social Security Number</th>
<th>Date of Birth</th>
<th>Alias</th>
<th>Gender</th>
<th>Banned</th>
<th>Household Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>138</td>
<td>Amos, Victoria Elizabeth</td>
<td>569-23-2369</td>
<td>08/14/1977</td>
<td></td>
<td>Female</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>145</td>
<td>Vicinte, Jacob</td>
<td>321-89-6547</td>
<td>06/07/1981</td>
<td></td>
<td>Male</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Showing 1-2 of 2

Continue  Cancel

11) Add additional HH members as needed:

Searching and adding one HH member
### Client Results

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
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<th>Date of Birth</th>
<th>Alias</th>
<th>Gender Banned</th>
<th>Household Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>139</td>
<td>Amos, Beatrice</td>
<td>458-12-2587</td>
<td>09/01/1999</td>
<td></td>
<td>Female</td>
<td>0</td>
</tr>
</tbody>
</table>

Showing 1-1 of 1

### Selected Clients

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</tbody>
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Showing 1-1 of 1

Searching and adding another member:

### Client Results

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<th>Alias</th>
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<th>Household Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>140</td>
<td>Amos, Magdaline</td>
<td>458-56-9876</td>
<td>04/19/2001</td>
<td></td>
<td>Female</td>
<td>0</td>
</tr>
</tbody>
</table>

Showing 1-1 of 1

### Selected Clients

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<td>04/19/2001</td>
<td></td>
<td>Female</td>
<td>0</td>
</tr>
</tbody>
</table>

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Click Continue to Add both to HH
12) Update information as needed for Head of HouseHold (HoH), Relationship to HoH and date Joined HH. Click Save & Exit

13) The new HouseHold Type has been created and will look like this on the HouseHolds Tab:

Adding (or exiting) HH Members

Client households change frequently, and to ensure data integrity, HMIS users need to keep up with these changes as we become aware of them. The following instructions are for adding HH members to a HH/family without the HH Type changing. For example: Two Parent Family remains a Two Parent Family when an additional Child is born, or a Male Single Parent remains as a Male Single Parent when an additional child is added to the HH (without Spouse or Significant Other).
When this occurs:
1) In ClientPoint, enter a client record for which the relevant HH has already been setup.
2) Click on the Households tab along the top of the client record.
3) In the relevant HH, click on Manage Household.
4) After ensuring that the HH type and Head of Household (HoH) are accurate, review the current HH members.
5) Once you know the HH created is accurate, click on Add /Delete Household Members.
6) In the popup, click on the drop down menu for Add Clients to the Household.
7) Enter the clients name and click search. If the client has already been created, he or she should show up here. If not, you will need to enter all relevant data, backdating to at least the day prior to the HH change.
8) Once the search is completed, click on the green plus sign next to the new client.
9) Click Continue.
10) In the popup, select the appropriate Relationship to Head of Household and the accurate date client entered the HH.
11) Click Exit.
   - Important note: If there is another open enrollment for these family members other than for your agency, consult with an HMIS user from the other agency before changing the HH composition to determine whether the HH should actually be changed. This should be a mutual decision between the two providers.

Adding Household Members back into a Household (HH)
1) In ClientPoint, enter a Client Record who is already a member of the relevant HH.
2) On the Households tab, click on the drop-down menu for Previous Household Members.
3) Click on the circular blue arrow to the left of the client’s name whom you wish to reenter back into the HH.
4) Enter the date the client reentered the HH, select the appropriate relationship to HoH, and click Save.

Adding Household Members to an Entry in ClientPoint
A new household member can be added after the initial project entry. This can be due to a birth, a parent getting their parental rights returned, or several other reasons. When this occurs, the entry needs to be edited to reflect the changes, after the client has been added to the HH following the instructions on the previous page of this manual.

1) In ClientPoint, go to the Head of Household’s (HoH) client record.
2) Under Entry/Exits, click on the edit pencil to the left of your project’s entry date.
3) Click Include Additional Household Members.
4) Check the HH members you want to add and click Continue.
5) Click Save and Continue. It's very important that you do not change the entry date here.
   *NOTE – The screen will show all family members with the original entry date. THIS IS CORRECT – WE WILL CHANGE THE NEW MEMBER’S ENTRY DATE BELOW.
6) The new family member is now entered into the entry.
7) If the new family member entered the project on the same date as the rest of the HH, complete the entry assessment as described above in Entry Data for Entry/Exit Projects.
8) If the new family member entered the project after the rest of the family, you will need to edit his or her entry date.
9) Click on the pencil to the left of the new HH member’s entry date.
10) Edit the entry date and click Save and Continue. *Note - it defaults to check each HH member - be sure to uncheck those members for whom the date is NOT changing.*

11) Complete the entry assessment for the new HH member.

**Adding Household Members to an Entry in ShelterPoint**

Often, a new household member will be added after the initial project entry. This can be due to a birth, a parent getting their parental rights returned, or several other reasons. When this occurs, the entry needs to be edited to reflect the changes, **after** the client has been added to the HH following the instructions on the previous page of this manual.

1) In ShelterPoint bedlist, click on the Head of Household’s (HoH) name.
2) Click Check In Additional Household Members.
3) Check the HH member(s) you want to add, enter the appropriate check-in date, and click Assign Unit.
4) Complete the entry assessment for the new HH member(s), click Save and Exit.

**Adding Household Members BACK into an Entry**

There isn’t a great way to do this, but a work-around is to do the following.

1) After adding the person back into the HH, exit the current family member(s) from the existing project entry.
2) The date of exit will be one day prior to the other member’s reentry into the HH.
3) The Destination will be “Permanent Housing for formerly homeless persons” if this is a permanent housing project or program. This will keep the client from potentially not qualifying for a program on the date of the second entry, and keep them from appearing to have exited in reports.
4) Create a new entry into the program dated one day after the prior entry’s exit.
5) Check all appropriate HH members, including the one reentering.

**Changing Head of Household (HoH) in an Open Project Entry**

When the HoH leaves, updates must be done to accurately reflect the new household.

1) Exit the HoH as usual, per the effective date of exit.
2) Once exited, click on the Significant Other or whomever will now be HoH.
3) Click on the Entry/Exit tab for the new HoH, and for the open project entry, click on the Interim icon.
4) Create an unscheduled Interim per instructions in this manual: [Interims]; select the date **after** the original HoH’s exit.
5) In the Interim assessment, change to Relationship to Head of HH to Self.
6) Save and exit.

**When Household Composition Changes**

There are times when the entire composition of the household changes, for instance; when a two-parent household becomes a single individual. When this occurs, prior to project entry, the following needs to be changed for any client still receiving services.

1) In the Household tab, create a new household for the client(s) who will be member(s) of the new household.
2) Before saving your changes, make sure the new household has the correct type, members and entry dates, and that each client has the relationship to head-of-household completed.
• Unless the HH type was incorrect at entry, **NEVER simply change the type to the new type and delete those who are no longer members.** Doing this will change the prior entries to an incorrect type and lose valuable “at entry” data. Always remember to consult with any other agency that has an open enrollment for the affected client(s) before making changes.

3) If the HH composition changes after project entry (which should usually only be if someone leaves or enters the HH), exit or enter the appropriate person in the project entry.

4) Create an Interim (unscheduled) with the date the change was made, and change the Relationship to HoH field in the assessment as needed.

• Once a HH is entered into the project, creating a new HH will not change any of the reporting, so simply exiting the member(s) who left, and if necessary, changing the Relationship to HoH in the assessment is all that needs to be done at this point.

### Adding Service Transactions

While any provider can choose to enter service transactions for a client, some provider types are required to enter and track services. RHY, SSVF, PATH, HOPWA-funded projects have specific services which must be tracked. These services can be automatically set as options for them by selecting the appropriate Provider Grant Type in the Standards tab of the Provider Admin.

1) In the Client record, on either the Summary tab or the Service Transactions tab, click on Add Multiple Services (it’s fine to just add a service, but these instructions are geared toward those who must track many services).

2) Select the family member(s) for whom the service will be made.

3) Select the appropriate Service Provider and enter the start and end dates.

4) Skip Service Type for a moment, and select the appropriate Type of FUNDER-TYPE FUNDED Service Provided (this doesn’t always appear).

5) Select the corresponding Service Type.

6) If necessary, change the Need Status.

7) Select Add Another or Save and Exit as necessary.

• Any agency can adjust what is captured in Service Transactions per their specific needs. These instructions are meant to apply to the broadest sense of how to complete a service transaction. Your agency settings might vary from the examples given.

### Adding Referrals

While any provider can choose to enter referrals for a client, some provider types are required to enter and track referrals. RHY, SSVF, PATH, HOPWA-funded projects have specific referrals which must be tracked.

1) In the Client Record, click on the Service Transactions tab, and the Referrals tab.

2) Click Add Referral.

3) Select the family member(s) for whom the referral will be made.

4) Select up to five Needs in the Service Code Quicklist section; multiples can be selected by holding down the CTRL button while selecting. Click Add Terms.

5) Select the appropriate provider from the Referral Provider Quicklist and click Add Provider.

6) Complete the Refer to Providers portion, and click Save All.
Any agency can adjust what is captured in Referrals per their specific needs. These instructions are meant to apply to the broadest sense of how to complete a service transaction. Your agency settings might vary from the examples given.

**Attachments**

ServicePoint allows for uploading of client files directly into the HMIS client record.

To upload an attachment into the client record:
1) Go to the Client Profile tab and scroll to Attachments.
2) Click Add New File Attachment.
3) Browse to the attachment, enter a description and click Upload.

To download attachments:
1) On the Client Profile tab, scroll to Attachments and click on the edit button to the left of the attachment.
3) In the dialog box, click on Download and Ok.

**Casenotes/Goals/Plans**

Not all agencies or providers choose to use the Casenotes function, but it can be very helpful if done consistently and properly.

1) In the client's Case Managers tab, add the appropriate person or people who will be entering information in the client’s casenotes, goals, and/or case plan (be sure to enter and end date if the client is no longer being case managed by this person).
2) In the Case Plans tab, click Add Goal, and select the client/clients (if part of a household) for whom this goal will be applicable (note – it may be easier to track just the HoH unless there is a specific reason to add goals for one HH member vs. the others).
3) Select appropriate Provider and Case Manager (only those who have been set in the Case Managers tab for the Provider selected will be available), and the date on which the goal is set.
4) Classification and can be adjusted in Provider settings, and Type depends on Classification – speak to your Agency Admin or System Admin if you would like these adjusted – but *always select an appropriate Classification to make finding Casenotes, Goals, and Action Steps easier to find.*
5) Fill out the rest of the fields as desired, noting that some of the dates and goals will influence reporting, particularly the Follow-up date, which will notify the person identified as the Case manager, including other Case Managers and other agencies, as selected.
6) Once the Goal is created, Casenotes, Action Steps and Service Items may be added for the Goal. Keep in mind the importance of completing the necessary fields in order to enable accurate reporting and follow-up notification.
7) If the provider's funding requires Services, they can be added from this tab. If there isn’t a need to track services specifically, Action Steps might be a better option.
8) Once Follow-ups are scheduled, a list of them will appear on the Home Screen of the HMIS user to whom they are assigned.
Incidents
Within ClientPoint, there is an opportunity to share a field called Incidents. This CoC has determined that this field is to be used when clients have something specific to them that is important for all providers to know. Appropriate information includes (but is not necessarily limited to) dangerous behavior and death. In order for all providers to view this information, it is important that all providers share this information.

1) In the Client Summary tab, click on Add new Incident.
2) Enter the Start Date and the select the Incident Type as appropriate.
3) Enter any other information you believe would be useful for all agencies, and click Save.

Important Things to Remember

- Data is to be entered *timely* into HMIS – within 5 business days of client contact.
- All HUD Universal Data Elements (UDEs) will be entered accurately for each client.
- Data will be complete and accurate - all HUD UDEs and project-specific fields *must be* completely filled out. (Missing UDEs will not exceed 5%)
- All HMIS client information must be given reasonable security measures. This means that full client names must not be emailed outside your agency, and any identified client data must be sent only with password protection.
- Before doing any data entry, be sure that you are entering data (EDA) via the correct HMIS provider. If you are unsure whether this applies to you, ask your agency administrator.
- Before creating a new client record in HMIS, search thoroughly to check whether they have an existing client record, and *verify the correct spelling of their name*.
- If a client is under 18 an entering a Runaway Homeless Youth (RHY) project, their data must not be shared outside the agency providing the RHY project.
- All clients should be entered into a household, even if they are a single individual.
- If the household (HH) composition changes, create a new HH with the accurate members *without* exiting from the old HH.
- Do not change static client demographic data (name, DOB, SS#, etc.) without first contacting the provider who entered it. If they no longer have records on the client, or are ok with the change, they may make it. If they prefer to have you make the change, go ahead, but be sure to backdate incorrect data to the date of the first project entry so that all provider records will be accurate.
- Do not access ServicePoint via laptop or tablet without first signing a Remote Access Agreement and obtaining both Agency Administrator and System Administrator approval and signature.
- Remember that ALL HUD CoC-Funded projects and programs require a review within 30 days of the annual anniversary of their entry. *Conduct and enter an annual assessment for every client within the allotted time, and date it for the anniversary of the entry date!*
- *Always access client data through the entry or service rather than the Client Profile, Summary or Assessments tab, unless instructed otherwise!*
Reports
ServicePoint provides several reports to check the quality and integrity of data. Often, we notice something is awry with a client or agency’s data, but have a difficult time determining exactly where the error lies. The following reports provide a way to look at specific projects and time frames to help narrow down the issues. **Please note that the APR, the APR Detail and the Data Quality reports can only be run by a user with an ART license, but can be provided to agencies by either the Agency or CoC HMIS Administrator as desired.** The reports folder can be found to the left of the ServicePoint navigation screen near the bottom.

**CoC - APR**
Annual Performance Report for ALL Projects
1) Click on Reports on the left side of your dashboard and then click on CoC-APR
2) The Report Options field will open. Enter the Provider. Click Search to locate your project and click the green+ next to the Provider. If you do not automatically return to the Report Options tab, click Exit prompt located at the bottom.
3) Enter Program Date Range information.
4) Click your specific program Entry/Exit Type which will be HUD if you receive CoC Program, ESG, HUD-VASH; BASIC if other funding, etc. Select only one Project Type. Hint: Usually based on funding.
5) Click Build Report.
6) The Data Quality components are called out in sections 6a to 6f to include Client Doesn’t Know/Client Refused (DKR), Information Missing, Data Issues, and % of Error Rate.
   • Note: Please review the entire report for data accuracy; e.g. **Section 25 Veteran Status** should list the appropriate number of veterans you have enrolled in your program; or **Section 26 Chronic Homeless Status** should only have chronic persons listed.
7) To locate the HMIS ID Client that has the missing or data issues, click on the number highlighted in BLUE and the names of the individuals will pop-up in a separate box. This will provide you the HMIS Client ID and Name. You will need to go into the Client Record to complete the missing data and/or correct the data error.
   • Note: **6e-Data Quality: Timeliness** reports on the number of days between client contact and when you enter your HMIS data. It is critical to ensuring our HMIS system operates in an effective and efficient manner to meet the data entry within “5 business days” of contact with the homeless individual established in the HMIS Agency Agreement. The CoC goal is “real time” data entry or within 24 hours.
     o Example: You can see below this project complies with the timeliness entry 65% of the time with 7 entries “real time”, 4 entries within 3 days, and 6 entries 11+ days.
8) Once you have identified the data errors using this report and make the necessary changes.

**Client Served**
The client served report is similar to the Entry/Exit report, but it reports clients receiving services rather than clients entered into a project.

1) Click on the Client Served Report in the Reports folder.
2) Unless applicable, do not click on the Reporting Group button.
3) Select the appropriate provider.
4) The default is that only the provider selected is run. If you instead want to see all clients active in any project your agency offers, select your main agency HMIS Provider and select The provider and its subordinates.
5) Select the services for which you want a report.
6) Select how you would like the clients to be grouped.
7) If desired, select a funding source on which you want to report.
8) Select the appropriate Service Code using the Lookup function if necessary.
9) Select desired date range. This can be for several years or for a day, as you choose. To look at the current day, enter the previous day as the start date and today as the end date.
10) If you wish to look only at clients served before a specific date range, enter that date range in Served Before Date Range.
11) In most cases, you should leave the Treat Open-Ended Services/Referrals as 1-day Services section as-is.
12) Legal adult age is 18 as used in this CoC.
13) Click Build Report.

**Entry/Exit**
1) Click on the Entry/Exit Report in the Reports folder.
2) Unless applicable, do not click on the Reporting Group button.
3) Select the appropriate provider.
4) The default is that only the provider selected is run. If you instead want to see all clients active in any project your agency offers, select your main agency HMIS Provider and select the provider and its subordinates.
5) Select desired date range. This can be for several years or for a day, as you choose. To look at the current day, enter the previous day as the start date and today as the end date.
6) Legal adult age is 18 as used in this CoC.
7) Select Entry/Exit type. This can be HUD, Basic, Basic Center Program, VA, etc. If unsure, ask your agency administrator.
8) Click Build Report.

The great thing about this report is that you can click on the hyperlink number in a specific count and it will show you which clients those numbers represent. The unfortunate thing about this report is that it was created a long time ago, and many of the criteria shown are mapping to outdated fields in ServicePoint. In other words, some fields represented in this report have had the actual field value changed to a different value, so they are no longer accurate. *This report should ONLY be used to look at client enrollment (questions 2-3). Other fields are no longer mapped to the current HUD UDEs.*

*The entry/exit report will always show households without children as singles, so please don’t be alarmed if adults in a household show up as singles.*

*Please note: When you select the incorrect Type upon client entry, other HMIS reports can show clients entered in the incorrect and correct type. For example, if the BGA Safe Place standard is to use Basic Entry Type, and someone accidentally selects Basic Center Program Entry/Exit when entering a specific client, that client will not show up on reports run for BGA Safe Place. This is because when a report is run, the report type is asked, and the one selected is the one that agency or project has selected or been asked to use based on their funding or services. So if a client is entered into the incorrect project type, the entry and data for that client is not counted. The good news is that running the Entry/Exit report for incorrect entry types will show you the errors, which can then be fixed per the instructions found below with the heading Changing Project Types.*
**APR (Annual Performance Report)**

The APR is a report that required annually from any HUD-funded CoC project, and is a summary of what occurred in a project during the timeframe selected. While the report only needs to be filed annually, the information contained within is useful in determining whether the data entered matches what the agency knows to be true for the project. *This report is only available to those with an ART license. If you do not have an ART license but believe it could be useful, please speak with either your supervisor or the person at your agency responsible for software licensing.*

1) Click on ART at the bottom of the Reports folder.
2) In the main window, ART Browser, click on the drop-down for the Public Folder, and then click on the drop down for Art Gallery Reports and Resources ->ART Gallery Reports.
3) Click next until you get to 0625 – HUD CoC APR, and click on the magnifying glass next to it. *The versions change, so won’t be entered in this manual.*

*At this point, there are a few choices on how to run the report depending on your preferences and/or ART license type. For ease of use, this manual will focus on scheduling ART reports.*

4) Click on Schedule Report.
5) In the pop-up, click on either provider group or provider type.
6) Click Select, and type in a keyword to find your provider or provider group. *It takes a few moments to load, so let it finish loading before clicking the Search button.*

7) Click the red minus sign next to None Selected to remove it from the report, and click Search.
8) When the search results are shown, click the green plus sign next to the once you wish to select.
9) In the popup, click Submit.
10) Click on Enter Start Date.
11) In the popup, enter the applicable date. If it’s for an APR, it will be the first day of the grant. If using the APR for data quality, it will be the first day of the time period for which you want to report. Click on PM to change it to read AM.
12) Click on Enter End Date PLUS One Day.
13) As indicated, you need to add a day to the reporting period. For example, if your grant period is 9/1/14 – 8/30/15, you would enter 9/1/15 in this field. Click on PM to change it to read AM.
14) Click on Select Entry Type, and click Select on the popup.
15) In the popup, after it finishes loading, click on HUD, or Basic, etc., whichever type is used by your project, and click Submit.
16) Scroll down to Enter Effective Date, and select.
17) Enter the date you entered for Enter End Date PLUS One Day.
18) Scroll to the bottom of the popup and click on Is using the Receiving Income Source etc.
19) Click Select, and once it finishes loading, select Yes and click Submit.
20) Do the same for the remaining three options, unless specifically told not to by your agency.
21) Click Next.
22) In the popup, you may change the name of the report if you wish. A good practice is to add the project name at the beginning.
23) In Report Format, select whether you wish the report to be in pdf or Excel format. *Best practice is to create this report as a pdf.*

24) Under Interval, select how often you would like this exact report run. *If running this report for an annual APR, it’s often helpful to set it to run daily, so that you can re-check it after data has been edited.*

*Note: If a report is set to run more than once, it will do so with the same dates originally entered. If you wish to have the report run monthly, for instance, with each report showing a different time interval, you must recreate the entire report each time.*
25) Under Start Date, this is the date you wish the report to be run, not the dates the report is capturing. **If you need this report to be run more than once, it’s good practice to set it to sometime between 3:15 and 4am daily, as ART refreshes at midnight and isn’t finished refreshing until after 3am.** If it takes you a minute or more to finish with this popup, it’s a good idea to set the time for a couple minutes into the future, so by the time you hit the Submit button, the start time hasn’t already passed.

26) For End Date, select the date you wish the report to run until, or if only running it once, just make sure the end date and time are after the start date and time. This is especially important if you have set the start time into the future, or you will be telling the report to end before it starts.

27) Click Submit.

28) In your Scheduled Reports section in ART, at the bottom, there is a refresh button. If you click it, you should see the new report pending.

29) After giving the report some time to run (it can take from one to 15 minutes, depending on the report), scroll up to your ART Inbox. If it’s already open, click it closed and then open again so the folder can refresh.

30) Once the report is completed, click on the magnifying glass next to it in the Inbox.

31) In the popup, select Download.

32) In the new popup, select whether you would like to open or save the report, and click OK.

**APR Detail**

The APR Detail Report is similar to the APR Report, except rather than a summary of all client data, it shows a breakdown of each client and the relevant HMIS responses for each.

1) Click on ART at the bottom of the Reports folder.

2) In the main window, ART Browser, click on the drop-down for the Public Folder, and then click on the drop down for Art Gallery Reports and Resources ->ART Gallery Reports.

3) Click next until you get to 0631 – HUD CoC APR Detail, and click on the magnifying glass next to it. **The versions change, so won’t be entered in this manual**.

**At this point, there are a few choices on how to run the report depending on your preferences and/or ART license type. For ease of use, this manual will focus on scheduling ART reports.**

4) Click on Schedule Report.

5) In the pop-up, click on either provider group or provider type.

6) Click Select, and type in a key word to find your provider or provider group. **It takes a few moments to load, so let it finish loading before clicking the Search button.**

7) Click the red minus sign next to None Selected to remove it from the report, and click Search.

8) When the search results are shown, click the green plus sign next to the once you wish to select

9) In the popup, click Submit.

10) Click on Enter Start Date.

11) In the popup, enter the applicable date. If it’s for an APR, it will be the first day of the grant. If using the APR for data quality, it will be the first day of the time period for which you want to report. Click on PM to change it to read AM.

12) Click on Enter End Date PLUS One Day.

13) As indicated, you need to add a day to the reporting period. For example, if your grant period is 9/1/14 – 8/30/15, you would enter 9/1/15 in this field. Click on PM to change it to read AM.

14) Click on Select Entry Type, and click Select on the popup.

15) In the popup, after it finishes loading, click on HUD, or Basic, etc., whichever type is used by your project, and click Submit.

16) Scroll down to Enter Effective Date, and select.

17) Enter the date you entered for Enter End Date Plus One Day.
18) Scroll to the bottom of the popup and click on Is using the Receiving Income Source etc.
19) Click Select, and once it finishes loading, select Yes and click Submit.
20) Do the same for the remaining three options, unless specifically told not to by your agency.
21) Click Next.
22) In the popup, you may change the name of the report if you wish. A good practice is to add the project name at the beginning.
23) In Report Format, select whether you wish the report to be in pdf or Excel format. **Best practice is to create this report as a pdf.**
24) Under Interval, select how often you would like this exact report run. **If running this report for an annual APR, it’s often helpful to set it to run daily, so that you can re-check it after data has been edited.**

**Note:** If a report is set to run more than once, it will do so with the same dates originally entered. If you wish to have the report run monthly, for instance, with each report showing a different time interval, you must recreate the entire report each time.

25) Under Start Date, this is the date you wish the report to be run, not the dates the report is capturing. **If you need this report to be run more than once, it’s good practice to set it to sometime between 3:15 and 4am daily, as ART refreshes at midnight and isn’t finished refreshing until after 3am.** If it takes you a minute or more to finish with this popup, it's a good idea to set the time for a couple minutes into the future, so by the time you hit the Submit button, the start time hasn’t already passed.
26) For End Date, select the date you wish the report to run until, or if only running it once, just make sure the end date and time are after the start date and time. This is especially important if you have set the start time into the future, or you will be telling the report to end before it starts.
27) Click Submit.
28) In your Scheduled Reports section in ART, at the bottom, there is a refresh button. If you click it, you should see the new report pending.
29) After giving the report some time to run (it can take from one to 15 minutes, depending on the report), scroll up to your ART Inbox. If it’s already open, click it closed and then open again so the folder can refresh.
30) Once the report is completed, click on the magnifying glass next to it in the Inbox.
31) In the popup, select Download.
32) In the new popup, select whether you would like to open or save the report, and click OK.
33) This report will allow the user to view missing or inaccurate information by client, so that any client showing incorrect information can be fixed.

### Data Quality Reports

There are several Data Quality reports in ART, but the easiest to use is the 0252 - Data Completeness Report Card (EE). This can be run using either one project’s Entry/Exit data, or for a Provider Group, using the [PG] option.

1) Click on ART at the bottom of the Reports folder.
2) In the main window, ART Browser, click on the drop-down for the Public Folder, and then click on the drop down for Data Quality.
3) Click on the magnifying glass next to 0252 - Data Completeness Report Card (EE). **The versions change, so won’t be entered in this manual.**

**At this point, there are a few choices on how to run the report depending on your preferences and/or ART license type. For ease of use, this manual will focus on scheduling ART reports.**
4) Click on Schedule Report.
5) In the pop-up, click on Enter Start Date.
6) Enter the first day of the time period for which you want to report. Click on PM to change it to read AM.
7) Click on Enter End Date PLUS One Day.
8) As indicated, you need to add a day to the reporting period. For example, if your reporting period is 9/1/14 – 8/30/15, you would enter 9/1/15 in this field. Click on PM to change it to read AM.
9) Click Select Provider (Provider Group, if running the PG version).
10) Click Select, and type in a key word to find your provider or provider group. **It takes a few moments to load, so let it finish loading before clicking the Search button.**
11) Click the red minus sign next to None Selected to remove it from the report, and click Search.
12) When the search results are shown, click the green plus sign next to the once you wish to select
13) Click on Include Services in Report Card?
14) Click Select.
15) If your project enters services provided, click on the green plus sign next to Yes. If not, click on the green plus sign next to No. Click Submit.
16) In the popup, you may change the name of the report if you wish. A good practice is to add the project name at the beginning.
17) In Report Format, select whether you wish the report to be in pdf or Excel format. **Best practice is to create this report as a pdf.**
18) Under Interval, select how often you would like this exact report run. **If running this report for an annual APR, it’s often helpful to set it to run daily, so that you can re-check it after data has been edited.**

**Note:** If a report is set to run more than once, it will do so with the same dates originally entered. If you wish to have the report run monthly, for instance, with each report showing a different time interval, you must recreate the entire report each time.

19) Under Start Date, this is the date you wish the report to be run, not the dates the report is capturing. **If you need this report to be run more than once, it’s good practice to set it to sometime between 3:15 and 4am daily, as ART refreshes at midnight and isn’t finished refreshing until after 3am.** If it takes you a minute or more to finish with this popup, it’s a good idea to set the time for a couple minutes into the future, so by the time you hit the Submit button, the start time hasn’t already passed.
20) For End Date, select the date you wish the report to run until, or if only running it once, just make sure the end date and time are after the start date and time. This is especially important if you have set the start time into the future, or you will be telling the report to end before it starts.
21) Click Submit.
22) In your Scheduled Reports section in ART, at the bottom, there is a refresh button. If you click it, you should see the new report pending.
23) After giving the report some time to run (it can take from one to 15 minutes, depending on the report), scroll up to your ART Inbox. If it’s already open, click it closed and then open again so the folder can refresh.
24) Once the report is completed, click on the magnifying glass next to it in the Inbox.
25) In the popup, select Download.
26) In the new popup, select whether you would like to open or save the report, and click OK.

**Length of Stay Reports**

Often throughout the year, there is a need to run a Length of Stay Report. This report looks at the date the client first entered a specific type of housing and the date they left for the last time. In other words, if they entered SafePlace, exited, and entered CAO Family Shelter, it will show the length from the first entry into SafePlace to the last exit from CAO. It will do this for all types of
projects, but the most common are Emergency Shelter, Transitional Housing, Rapid Rehousing and Permanent Supportive Housing. The report can be found in ART>Public Folder>Washington County> Original First Entry and Final Exit for LOS – ES.

1) Double-click on the report to open it, and select Schedule Report.
2) Select the Provider(s) for which you wish to run the report, click Submit.
3) Enter the first day you want the report to capture, and click Submit.
4) Enter the last day, adding one day, and click Submit.
5) Once run, evaluate the report. The Read Me tab explains what each tab provides, and the report even shows exits to permanent housing.
System Performance Measures
There are ART reports that were specifically created to look at the performance of the CoC as a whole in terms of project types, retention, recidivism, funding sources, and placements into permanent housing. These reports can only be run by those with ART licenses, and the reports can be found in the ART public folder -> ART Gallery Reports and Resources -> ART Gallery Reports. The System Performance Measures reports are:

0700 - Length of Time Persons Homeless-Metric 1 - v1
0701 - Exits to Permanent Housing with Return to Homelessness, Metric 2 - v1
0702 - Number of Homeless Persons-Metric 3.2 - v1
0703 - Employment and Income Growth for CoC Funded Projects Metric 4 - v2
0704 - Number of Persons First Time Homeless, Metric 5 - v1
0706 - Permanent Housing Placement-Retention Metric 7 - v2

Though the prompts for each report may be in different order, the same prompts appear for all the 0700 series reports. Other prompts are subject to what the user is trying to accomplish. (i.e., EDA Provider, and 0704 has one extra prompt, detailed in 10), below.
1) Click on the magnifying glass to the left of the report.
2) Click Schedule Report.
3) If you are Agency Admin desiring to view the data for your providers, click on Select Provider(s) and select either your main agency “umbrella” provider, or select each HMIS provider you wish to review individually, then click Submit.
4) If you have the access, and desire to view data from the entire CoC, click on Select CoC Code and select OR-506 Hillsboro/Beaverton/Washington County CoC, then click Submit.
5) Click on Enter Start Date and enter the Start Date for the Current Reporting Year.
6) Click on Enter End Date Plus One Day and enter the day following the last day of the reporting year (usually this will be the same date, the following year).
7) Click on Enter Prior Year Start Date. This will usually be the same date as the Start Date, but a year prior to the start date.
8) Click on Enter Effective Date. This is usually the same date as the End Date Plus One Day. *Note: if running report 0704, see 10) below.
9) Click Next, and in the popup, select the desired report format and frequency. Before clicking Send, ensure that the start time for the report hasn’t already passed. If it has, adjust both the Start Time and the End Time for a couple minutes in the future, or for the time you wish to run the report, and click Send.
10) For Enter Transaction Cutoff Date, the default date of 10/01/2012 is provided because it is the end of the HUD “lookback” period. It can be changed for local reporting if so desired.

Case Management/Goals Reports – ART 0404 – Client Case Plans
This report is designed to allow users to view multiple clients and their respective case plans at once. The Case Plan document displays goals, action steps, and case notes with full details as well as a history of the client’s program enrollment, caseworkers, and infractions. The Case Plan document is designed to allow batch printing with each client’s plan beginning on a new page. Drill filters allow the user to limit the report to a single client or to the clients of a specific caseworker. Additional Tabs include a case note – only display, a goal analysis tab and case plan statistics. Simply enter the prompts that are appropriate for the information you desire, and the report will show you the information you have requested.
Troubleshooting
This section is intended to assist the user in determining why reports are not showing the data entered as expected. *This is not a comprehensive guide to fixing all data issues in ServicePoint HMIS. There are many potential problems that occur; these are only the most common.*

Before embarking upon fixing problems with data or other client elements, make sure you consult with providers from any other agency that is actively working with the client, so you don’t create issues with their data.

Fixing Broken Households (HH)
Often, a project's availability or the amount of households enrolled in a project shows more HHs than expected. When this occurs, the following steps should be taken.

1) Run an Entry/Exit Report as described above.
2) Once the report is run, review the amount of singles and individuals entered. The numbers are hyperlinks that show which clients are represented in each portion of the report.
3) If, for instance, you have a child showing as an Individual, the child is not entered into his or her HH and project entry correctly. Another red flag is one family member showing as an individual, apart from the rest of the family. Both these issues are touched upon below.
4) Note who is showing up in incorrect family types. If there are several, download the report via the button on the bottom of the popup and view the list as a spreadsheet.
5) For each client incorrectly sorted, go into their Client Record in ClientPoint.
6) Once in the client record, click on the Households tab along the top.
7) Review the family composition, including how many members are represented, relationship to Head of Household, and date they entered the household.
8) Review the HH composition to determine the error.
9) Edit as described above in Adding Household Members to a Household and Adding Family Members to an Entry.
10) Once the HH has been fixed, run an Entry/Exit report to verify the change as described in Entry/Exit

Fixing Broken ShelterPoint/ClientPoint Entries
One inherent problem with ShelterPoint is that when it helpfully auto-creates a project entry with a shelter stay, it becomes very difficult to delete incorrect entries after the fact, because they are linked. When this occurs, the following must be done:

1) Go into the Head of Household for the family with incorrect information, click on the Service Transactions tab.
2) Once in Service Transactions, click on View Shelter Stays. This will show a list of the shelter stays for the client.
3) Make note of the correct dates the client and family should have shelter entries; then click on the Trash can to the immediate left of the shelter stay.
4) Do this for the rest of the family.
5) Once the incorrect data has been deleted, re-add the family using the instructions in the section called Entry Data for ShelterPoint Check-in Projects.
Changing project type, name, or date
When a client is accidentally entered into an incorrect project type, name, or date, it needs to be corrected to show up properly in reporting.

1) In the client record, click on the edit pencil to the left of the project Entry Date.
2) Click Save and Continue.
3) At the top, under the appropriate field, select the correct response.
4) Click Update. *If you don’t, it won’t save it.*
5) Scroll to the bottom and click Save and Exit.

Point in Time Workflow
The Point in Time (PIT) count is an annual process by which the CoC collects data on all clients considered homeless on the last Wednesday in January. The process is standardized for the whole state of Oregon, and each CoC collects their individual data and submits it to the HMIS lead for the implementation; currently, this is Wendy Smith at the Portland Housing Bureau. There are two types of homeless that are counted; sheltered and unsheltered. The process for counting each is specific and detailed.

The HIC, or Housing Inventory Count, collects information on beds and units in the Continuum. To get these numbers, the HMIS Administrator will run the ART report in the Washington County folder called WashCo - Program Daily Census. This will give a preliminary draft of the numbers captured, and will be sent to providers so they can check and verify the counts.

Sheltered Count
In order to count those clients that are sheltered, we request that each Emergency Shelter, Transitional Housing and Safe Haven completes the “2017 WashCo One Night Homeless Count” assessment for each client which will be in the project as of the last Wednesday in January, including projects that do not use HMIS. Currently, this includes Jubilee Transitional Housing, Monika’s House, and Mary Mac House. *The information for these projects needs to be gathered from the agencies that run them and entered separately into HMIS “placeholder” providers set up for this purpose.* Historically, Community Action collects and enters Jubilee clients, and the Washington County HMIS Administrator runs a report for both Mary Mac House and Monika’s House in the HMIS Comp site called WashCo-PIT in ReportWriter. **Be sure to change date range in filter.** Before client data entry, **backdate HMIS to the date prior to the PIT.** These clients and households then need to be created in HMIS and entered into the appropriate “placeholder” provider with the day of the PIT as the entry date, and the following day as the exit date.

*Note – for the Comp site providers, I use HH id as last name, and first name is A for Self, followed by B, C, etc. As these client records have very little identifying information, be sure to not use the same letter twice for the first name. In other words, family one’s first names are A, B, and C. Family two’s first names are then D, E, and F.

*Note – for clients from the Comp Database, they do not need to enter from the streets, ES or SH to qualify as homeless – they are fleeing domestic violence, and that qualifies as homeless.*

Once entered and the regular HH Data Sharing is completed, in the Entry, complete the assessment for each family member. When finished, exit back to the same type of shelter being provided on the date immediately following the PIT.
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To assist users with the verification of accurate data, the report Entry/Exit Report may be used for a one-day span including the PIT date. This will not give all the necessary data, but will allow HMIS users to accurately see how many people are receiving services in their facility at any given time. **This report should be used as a tool to ensure that anyone who was receiving shelter services but does not show up in the Entry/Exit report is entered into the appropriate project on the appropriate date, and vice-versa.**

1) Emails are sent to HMIS users in participating projects starting the first of January to remind people to ensure the data entered for all clients in their project is entered and accurate. **Note – this is in addition to regular data quality reports sent to assist them in ensuring data accuracy and integrity.** The HMIS users are also instructed to complete the “2017 WashCo One Night Homeless Count” assessment for each client which will be in the project as of the last Wednesday in January. **When this data is entered after the fact, HMIS users need to back-date the entry to ensure it is effective as of the date prior to the PIT.**

2) To complete the 2017 WashCo One Night Homeless Count, the agency HMIS user must first open the client record in HMIS.

3) **If the homeless assessment is being completed before the PIT date,** the user need only click on the pencil icon to the left of the client’s entry date to your project. The Entry screen will pop open. Make sure all family members’ names are checked at the top of the screen.

4) Click Save & Continue, and the Entry Assessment will then load on the Entry screen.

5) At the top of the Entry Assessment, you should see Household Data Sharing. Click the “Add Household Data” button under Household Data Sharing. **Note – if you do not see Household Data Sharing at the top of your entry assessment, call/email me and I will add this for you.**

6) Check off all family members’ names at the top of the Household Data Sharing window.

7) With the exception of the last four questions on the top portion of the assessment, answer all the questions that are relevant to the whole household as you would usually answer them at project entry. **Note: If there are different answers for different household members, enter these individually in each person’s entry assessment – the same as you would for any project entry.**

8) Scroll to the header “ONHC Homeless Count – START HERE” and complete the first four questions. **Note: The OHCS Program IDs are for identifying where people participated in the street count, not the sheltered count.**
   a. CAA/Lead Agency: CAO Washington County
   b. Current County of Residence: Washington
   c. City: Appropriate city
   d. If turned away, where will you stay tonight?: Appropriate response
   e. OHCS State Program ID and OHCS State Program ID2: Leave blank.

9) When finished, click Save & Exit, and answer all data elements in the entry assessment.

10) Click Save, and then click on the next household member and answer all data elements for that member.

11) Once all members have been completed, click Save & Exit.

12) Go to the first member of the next household on your list and repeat these steps. Continue until this process has been done for everyone in your emergency, safe haven, or transitional housing projects the last Wednesday of January.

**Important – when entering a disabling condition for an unsheltered client, since the form asks if the disability is long-term and impairs their ability to work or be housed, if they answered yes, be sure to answer Yes in the disability sub-assessment line item to the questions “Above condition is going to be long-term,” “Determination,” and “Expected to be of long-continued or**
indefinite duration and substantially impairs ability to live independently.” Disabilities also must be entered as having started prior to the date of the PIT.

*NOTE: If there is already something entered in one of the ONHC Fields, look at the date. If it’s from more than 6 months ago and is no longer relevant to the client’s current situation, it needs to be removed. If it’s recent, look at the client’s entry/exit tab. Are they already in another project over PIT? If so, determine whether this client might have been captured as both Sheltered and Unsheltered for the PIT, and enter them or not depending on which is accurate. If unsure, please contact your System Administrator.
Unsheltered Count
For those clients who are not receiving services from a shelter on the date of the PIT, there is a different protocol that must be done correctly in order to be counted. The unsheltered count is usually done by Community Action Organization in association with selected HMIS users. Those trained will conduct outreach using a paper copy of the One Night Homeless Count assessment, and the data collected will then be entered as follows.

1) If entering data AFTER the PIT date, backdate ServicePoint to the date prior to the PIT date. Do this by clicking on the Back Date link in the upper right corner of your ServicePoint login, and select the appropriate date. If before the PIT date, simply go to step 2.
2) Search for the client in ServicePoint, and if the client already exists in ServicePoint, open the client record and move to step 5.
3) If the client doesn’t already exist in HMIS, click on EDA in the top right corner of ServicePoint and select CAO - Homeless Count (2818).
4) Create a new household following the steps provided in Create the Household.
5) Once the new client and household have been created, go to the Service Transactions tab and select Add Need.
6) Select CAO – Homeless Count (2818) as the provider, and enter the information as follows:
   a. Need = Emergency Shelter
   b. Date of Need = 01/25/2017 (or whichever date is accurate for the year you are entering)
   c. Need Status = Closed
   d. Outcome of Need = Not Met, Click “Save & Exit”
7) Add Information from the paper form for all household members:
   a. Through the Client Summary tab or the Assessment Tab, select “2017 WashCo One Night Homeless Count.”
   b. Enter client data, following steps above for Sheltered Count, except for step – 7e.
   7e - For the Unsheltered Count, this field captures where the data was collected. All Washington County data collection points are located in the first field, OHCS Program ID. They all begin with WC and are sorted to the bottom of the list alphabetically.

*Failure to answer some questions can result in the data not being counted.

Important – when entering a disabling condition for an unsheltered client, since the form asks if the disability is long-term and impairs their ability to work or be housed, if they answered yes, be sure to answer Yes in the disability sub-assessment line item to the questions “Above condition is going to be long-term,” “Determination,” and “Expected to be of long-continued or indefinite duration and substantially impairs ability to live independently.” Disabilities also must be entered as having started prior to the date of the PIT.

*NOTE: If there is already something entered in one of the ONHC Fields, look at the date. If it’s from more than 6 months ago and is no longer relevant to the client’s current situation, it needs to be removed. If it’s recent, look at the client’s entry/exit tab. Are they already in another project over PIT? If so, determine whether this client might have been captured as both Sheltered and Unsheltered for the PIT, and enter them or not depending on which is accurate. If unsure, please contact your System Administrator.
Running the PIT Report in ART
Once all assessments and needs have been completed, the HMIS Administrator will run the PIT Report for the whole continuum.

The report is located in ART>Public Folder>Point in Time>0630 - Sheltered-Unsheltered PIT 20XX. Use the most recent version available. Often, the report for the current year is not released until a month or more after the PIT date.

*Note – if you have “turned off your “placeholder providers” such as Jubilee, Monika’s House and Mary Mac House so they don’t accidentally get counted in other COC reporting, be sure to turn them back on for the count. I generally just remove and then add back the CoC specification.

1) Double-click on the report to schedule it, and select from the prompts as follows:
   a. Select Provider(s): Select your ES, TH or SH projects including your One Night Homeless Count (ONHC) providers if needed.
   b. Select Provider CoC Code(s): Or 506
   c. Effective date: This is best used as the end date of the report
   d. Enter PIT Date: your PIT night
   e. Enter PIT Date PLUS 1 Day: your PIT night, plus one day
   f. Include Entry/Exits from ES Data: Yes
   g. Include Service/Shelters from ES Data: No

2) Once report is run, there are things to look for:
   a. Using the Tab C – Client Detail Tab, review your client list and either enter or exit clients, so the report is accurate.
   b. Correct any key missing data
   c. Review your Project Type – is it correct?
   d. Using the Tab E – Additional Information Tab, review your counts – do the households make sense? In other words, if you are a singles only shelter, were there families entered?
   e. Review your counts – how does this number compare to your capacity?

Entering the PIT Count into HUD Exchange
Once the information has been reviewed and the HMIS Administrator has determined it is accurate, the data is entered into the HUD Exchange, http://www.hudhdx.info/Default.aspx?home. If the HMIS Administrator does not yet have an account with the HUD Exchange, one must be created following the steps on the webpage.

1) In the HUD Exchange, click on PIT in the upper left. This will take you to the PIT data entry page.
2) Enter the data as is appears in the ART report, and submit when finished.
### Household Information Sheet

<table>
<thead>
<tr>
<th>Service Point ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Social Security</th>
<th>SSN</th>
<th>Race</th>
<th>Ethnicity</th>
<th>DoB</th>
<th>Address 1</th>
<th>Address 2</th>
<th>Address 3</th>
<th>Address 4</th>
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</tbody>
</table>

2-Annual - Effective: 5/1/2016
RHY (Runaway Homeless Youth)-Funded Projects

There are some projects that are specifically funded by the RHY program, which provides grants for runaway homeless youth. The HMIS guidelines for this program differ from the guidelines for non-RHY HMIS providers in the following ways:

1) RHY prohibits any youth *under the age of 18 who is entered into a RHY project* from sharing any HMIS data with another HMIS project, including name and demographics. The only exception to this is if one specific agency has more than one RHY project, the RHY-specific projects may share information. *The information should never be visible to any other agency or to any non-RHY project within the agency.* A RHY provider in HMIS must have their visibility “locked down” so that only those HMIS users with rights to that RHY project or another RHY project run by the same agency can see the data. This means that if an agency has both RHY and non-RHY projects, the non-RHY project cannot view HMIS client data from the RHY project. In this CoC, the only RHY-funded projects are Boys and Girls Aid (BGA) Safe Place and Transitional Living Program (TLP). So in this case, BGA employees entering data for Safe Place or the TLP project are allowed rights to each other’s data, but if BGA had another, non-RHY provider, HMIS users for the non-RHY provider would not be able to view the data. No other provider should have access to any client or client data entered by either project.

*Note: Anyone who has Enter Data As (EDA) rights to a certain provider can see that provider’s client data. So, an HMIS user for a non-RHY project that occasionally enters data for the RHY project, and so has EDA rights to that project, would be able to see client data for the RHY projects as well.*

2) RHY-funded projects are required to use different assessments which capture data elements specific to RHY clients. For this reason, there is a different HMIS entry, exit and interim assessment for RHY projects than for other projects. The RHY assessments are provided to the CoC by the vendor, and cannot be changed locally. If there is a perception that different or additional questions should be asked, it needs to be communicated with RHY rather than with the HMIS administrator.

3) RHY projects are required to track Services and Referrals – instructions are in the Services and Referrals sections of the manual.

For more information on RHY-specific requirements, search for the HMIS RHY manual on the HUD Exchange.

PATH-Funded Projects

PATH-funded projects are required to track services and referrals provided. Please refer to the Services and Referrals sections of the manual. For more information on PATH-specific requirements, search for the HMIS PATH manual on the HUD Exchange.

SSVF-Funded Projects

SSVF-funded projects are required to track services provided. Please refer to the Services section of the manual. For more information on SSVF-specific requirements, search for the HMIS SSVF manual on the HUD Exchange.
Rapid Rehousing (RRH) Projects
For Rapid Rehousing projects only, there is a specific question mandated by HUD, and in our entry assessments, it's called Residential Move-in Date. This question is the last question on the two main entry assessments used by this CoC, and is to be answered only if the RRH client has moved into permanent housing. The date of entry into RRH must be between the project entry and exit dates for the client to be counted in reports looking at housing.

Administrator Information
As an HMIS administrator, there are specific tasks and concerns which are important to understand.

Important Notes Before Using ServicePoint
An administrator has access to aspects of the database that others do not. As such, when data is entered, it's at a different level than other users, and confuses the system. Therefore, when entering client data, it's very important that an agency-level user is shadowed in the appropriate provider. Failure to do so can cause many data integrity issues, including Entry/Exit data showing as Missing or Incorrect in Data Quality Reports or APRs.

Resetting a user password in ServicePoint
1) Once logged into ServicePoint, click on arrow next to Admin in the left navigation pane and select User Admin.
2) Type the name of the user who needs assistance, click Search.
3) Select that user from the list that appears.
4) Under Consecutive Bad Logins, if it says 3, click Reset – if not, go to step 5.
5) Click Generate Password.
6) Once a new password appears, select it and delete it, typing in password123.
7) Click save and exit, and inform your user of the new password.

Provider Administration
Provider Creation and Update
Anytime it is determined that an HMIS provider needs to be created or updated, even if the agency is comfortable doing this without assistance from the System Admin, the Agency Admin needs to consult with the System Admin before and during the process to ensure that any settings within the provider will not create problems with the System-wide reporting done by the System Admin. Additionally, there will be times when the System Admin will notify Agency Admins that no new providers or changes to provider settings can be made until after the completion of reporting.

Tab settings can be customized to your agency and provider needs, but I do not recommend changing settings unless you completely understand the ramifications, and you know it’s something your users both understand and approve of. That said, be sure to print the current settings before making changes, so you can go back to the original settings if necessary.

Assessment Administration
Assessments are the forms into which data is entered at program entry, interim, or exit. Different program types and funding sources require different data to be gathered, for instance; RHY-funded programs are required to collect many questions specific to youth that aren't found on the regular entry assessments because no other funding source requires them, but it doesn't include questions
regarding Domestic Violence. Funding-source specific assessments are available in HMIS for the following program types:

RHY  
SSVF  
HOPWA  
HUD CoC and ESG  
PATH

Since Data collection requirements change frequently (see current version of HUD HMIS Data Standards), it is a good idea to use the specific assessments for each, but since they don’t contain all the data desired by most of these providers, we have a unique solution - most HMIS providers in this CoC use the WashCo – ENTRY assessment, which is always kept updated with any changes to the HUD-required Universal Data Elements, with the exception of PATH, RHY and SSVF providers. These providers use the type-specific canned assessments with a smaller “mini-assessment” provided with the Allow Multiple Assessments option in the Provider Administration Assessment Display Settings. This way, the only assessment that the HMIS Lead needs to worry about updating is the WashCo – ENTRY assessment. Note – some non-HMIS providers use their own assessments, which they are free to change or update as they wish. It is only the HMIS providers – those programs or projects catering only to the homeless population – that have the HUD and other Federal Requirements.

For the CoC HMIS Lead Only - A list of the CoC HMIS providers and the assessments used by them is in the HMIS Binder in the back pocket, and is in the shared folder S:\HOUSING\WP\Homeless Administration\HMIS, named Agency Assessments.

Also, CAO has an adept Agency Admins who is responsible for the administration of all CAO providers – please consult with them before making changes to their providers.

HUD Universal Data Elements (UDEs) including specific instructions for entering chronically homeless data

In order for HUD to ask for and receive the same data from all organizations receiving HUD funding, universal data elements had to be created. The data elements are the same across all jurisdictions and organizations, and are defined in detail in the HMIS Data Standards Manual. The answers to these questions are required for every HMIS project. All of these questions are on the entry assessments for each project requiring them. Other questions are required by HUD for some projects, and they are on the entry assessments for those projects. The current version is 2014, but it changes or is updated frequently, so it’s a good idea to Google the manual and click on the link to the most recent version.

The HUD UDEs are as follows, with explanations for those requiring it.

3.1 Name  
3.2 Social Security Number  
3.3 Date of Birth  
3.4 Race – If more than one race, select it in the Secondary Race field. Otherwise leave blank.  
3.5 Ethnicity  
3.6 Gender
3.7 Veteran Status

3.8 Disabling Condition – It is necessary to answer the question and complete the HUD Verification Sub-assessment.

3.917 Living Situation – See detailed instructions below.

3.10 Project Entry Date – This is entered upon project entry.

3.11 Project Exit Date – This is entered upon project exit.

3.12 Destination – This is entered upon project exit.

3.13 Personal ID – SOFTWARE GENERATED

3.14 Household ID – SOFTWARE GENERATED

3.15 Relationship to Head of Household

3.16 Client Location – In Washington County, this will be CoC 506, in Portland, it would be CoC 501, etc.

**Chronically Homeless (Universal Data Element 3.917, Living Situation) Instructions**

This HUD UDE is specifically used to identify chronically homeless persons, and the actual questions asked might be different based on the type of program entered and the answer given. *It is very important to answer these questions in the order they appear on your entry assessment.* Please use the guidelines below to assist in entering the data per HUD's intent. To comply with HUD mandates, there are different vendor-created entry assessments for different types of providers. Assessment 3.917a is for street outreach, emergency shelter, and Safe Haven projects (HUD CoC & ESG Entry SO ES SH), and the other, 3.917b, is for all other provider types (HUD CoC & ESG Entry All Other Projects). The methodology and details are at the end of this section. **NOTE: This element is to be answered for HoH and all adult HH members.**

*Please note: Not all responses will show up in an entry assessment. They are conditional responses, so some questions will appear only if previous questions are answered in a certain way.

*ALL OF THESE, IF VISIBLE IN THE ENTRY ASSESSMENT, MUST BE ANSWERED.

1. Residence prior to project entry – these responses are split into three categories: Homeless Situation, Institutional Situation, and Transitional and Permanent Housing Situation. Most of the responses in these categories are self-explanatory, but two require explanation.

   - Interim housing is not a type of housing but rather a housing situation where a chronically homeless person has: applied for permanent housing, has been accepted, a unit/voucher for permanent housing has been reserved for them, but for which there is some other situation that prevents them from moving immediate move into housing (e.g. apartment getting painted, old tenant moving out, has a voucher but is looking for the unit, etc.). In such cases, where it has been determined to be absolutely necessary that to keep the client engaged and moving towards housing a temporary solution must be utilized and transitional housing is used the client should then be identified upon move in to the permanent house as coming from “interim housing”. This will enable that individual/household to be identified as chronically homeless at intake for reporting purposes based on the responses to the elements that will follow. Note: This housing is not a substitute for a waiting list or for any situation other than identified here.

   - Permanent Housing for formerly homeless persons is to be used when a client transfers from one permanent housing project to another. The reason for this is to be accurate as to the client residence on the night prior to entry, while not
disqualifying a client from programs that require homelessness the night prior to project entry. The HUD explanation from the HMIS Data Standards is below.
Permanent housing for formerly homeless persons (such as: a CoC project; HUD legacy programs; or HOPWA PH)

2. Length of Time in Prior Living Situation
3. Approximate Date Started
3. Regardless of where they stayed last night – total number of times the client has been on the streets, in ES, or SH in the past three years including today
4. Total number of months homeless on the street, in ES or SH in the past three years

For UDE 3.917a and b, the methodology for garnering an accurate response from the client can be found in the HMIS Data Standards DATA MANUAL.
This Agreement is entered into on ___/___/_____ (MM/DD/YYYY) between NWSSC/WCDHS HMIS and _____________________________ (Organization Name).

NW Social Service Connections (NWSSC) is the administrative entity that governs a multiple of key stakeholder\(^1\) implementation of Management Information System (CMIS/HMIS) used to record and share information among service-providers on services provided to homeless and near homeless Clients. The NWSSC/WCDHS HMIS system of choice is ServicePoint. ServicePoint (trademarked and copyrighted by Mediware Information Systems) is an information system that provides standardized assessment of a Client's needs, creates individualized service plans and records the use of housing and services which communities can use to determine the utilization of services of participating Service Providers, identify gaps in the local service continuum and develop outcome measurements.

The City of Portland, Portland Housing Bureau (PHB) is the owner and operator of the NWSSC/WCDHS HMIS and serves as the NWSSC System Administrator and custodian of data in the CMIS/HMIS. The lead organization for NWSSC is the City of Portland, Portland Housing Bureau (PHB) in partnership with key stakeholder\(^1\) organizations, including Washington County, OR with PHB Intergovernmental Agreements. The NWSSC System Administrators are ServicePoint dedicated program staff from PHB, additionally each of the key stakeholder\(^1\) organizations may have identified staff functioning as local ServicePoint System Administrators.

Any documentation, agreements, policies and forms created for use with NWSSC/WCDHS HMIS must incorporate all NWSSC/WCDHS HMIS policies, agreements, and documents and be no less restrictive.

In this agreement, “Participant” is an Organization that uses ServicePoint; “Client” is a consumer of services.

This agreement is between WCDHS and _____________________________ (Participant). Additional organizations may join HMIS in accordance with the NWSSC/WCDHS HMIS Policies and Procedures.

A. Consideration: Participant agrees to pay WCDHS an annual software support charge for each year the Participant uses HMIS.

1. Operating Policies: Participant agrees to follow and comply with all the following applicable policies and procedures, each of which may be modified by NWSSC HMIS System Administrators or WCDHS System Administrator which are attached hereto and incorporated herein by this reference:

- Security Addendum
- NWSSC /WCDHS HMIS Policies and Procedures
- NWSSC/WCDHS HMIS Community Data Standards
- NWSSC/WCDHS HMIS Data Expectations and Exceptions
- NWSSC/ WCDHS HMIS User Agreement
- NWSSC/ WCDHS HMIS User Agreement Instructions
- NWSSC/WCDHS HMIS Remote Access Policy and Agreement

\(^1\) Contact NWSSC System Administrator for the list of key stakeholders
NW Social Service Connections  
(Washington County, OR)  
Agency Participation Agreement

- NWSSC/WCDHS HMIS and HIPPA
- NWSSC/WCDHS HIPPA Addendum
- Notice of Uses and Disclosure, Intake and Consent/Release of Information
- Notice of Uses and Disclosure, Intake and Consent/Release of Information for posting
- HMIS Intake Form (Sample)

2. **Technical Support:** Mediware Information Systems is providing hosting services for NWSSC/WCDHS HMIS and Service Point. Mediware provides hosting, maintenance, monitoring, and administration for servers. The System Administrators and Mediware will provide continuing technical support as related to the ServicePoint system within budgetary constraints. Participating agencies will identify staff that will use the system and receive user licenses. If the agreement is terminated, NWSSC/WCDHS HMIS System Administrators will revoke user licenses, and the Participant shall promptly return any documentation to the System Administrators. Mediware Information Systems shall operate and maintain the network server, software, and any other network or communication devices at the host site, which is necessary for the proper functioning of the ServicePoint system. Each Participant shall provide and maintain its own computers and connection to the Internet.

3. **Computers:** Security for data maintained in NWSSC/WCDHS HMIS depends on a secure computing environment. Computer security is adapted from relevant provisions of the Department of Housing and Urban Development's (HUD) "Homeless Management Information Systems (HMIS) Data and Technical Standards Notice". Agencies are encouraged to directly consult that document for complete documentation of HUD's standards relating to HMIS. [https://www.hudexchange.info/programs/hmis/hmis-data-and-technical-standards/](https://www.hudexchange.info/programs/hmis/hmis-data-and-technical-standards/). NWSSC, Community Stakeholders and WCDHS may add additional standards and will provide notice(s) to Participants.

4. **Training:** The Participant is responsible for training related to basic computer skills as well as confidentiality and ethics training. The System Administrators shall assure the provision of training of necessary Participant staff in the use of ServicePoint. The System Administrators will provide training updates, as necessary and reasonable due to staff changes and changes in technology.

5. **Data:** The Participant shall not be denied access to Client data entered by the Participant. Each Participant is bound by all restrictions placed upon the data by the Client of any Participant. Each Participant must diligently record and take all other appropriate actions to assure ServicePoint includes and reflects all restrictions or release of sharing records the Client has requested. Each Participant must also keep on file all Release of Information forms, including NWSSC/WCDHS HMIS Client Consent/Release of Information Forms. A Client may not be denied access to their own records.

A Participant shall not knowingly enter false or misleading data under any circumstances. All Participants shall provide the System Administrators with the appropriate ResourcePoint Data. Violation of any of the above sections by a Participant is a material violation of this agreement.

If this agreement is terminated, the System Administrators shall provide to the Participant an electronic copy of their Client data. A hardcopy form will be available, upon written request, within seven (7) working days. Nonetheless, the System Administrators and remaining...
Participants shall continue a right of use of all Client data previously entered by the terminating Participant. This use is subject to restrictions requested by the Client and may be used only in furtherance of the purpose of the NWSSC/WCDHS HMIS application.

6. Confidentiality of Information: Each Participant understands that participation in the NWSSC/WCDHS HMIS system will make confidential information in the Client Profile available to other Participants as outlined in the NWSSC/WCDHS HMIS Policies and Procedures. It is the responsibility of each Participant to observe all applicable laws and regulations regarding Client confidentiality. Only Client specific data approved for release by the Client and properly recorded by the Participant shall be accessible to other Participants. The Participant will provide staff training in privacy protection, for their ServicePoint users.

If a Client withdraws consent for sharing of information (release of information), the Participant remains responsible to ensure that the Client’s information is restricted at the Client Profile level and therefore unavailable to other Participants. If a Participant terminates this agreement the Participant must notify the NWSSC/WCDHS HMIS and lead organization System Administrators of the withdrawal. System Administrators and remaining Participants shall continue a right of use of all Client data previously entered by the terminating Participant. This use is subject to restrictions requested by the Client and may be used only in furtherance of the purpose of the NWSSC/WCDHS HMIS application.

Aggregate data may be made available by HMIS lead organizations to other entities for funding or planning purposes pertaining to providing services to the homeless. However, data released by the HMIS lead organizations must never directly identify individual Clients.

De-identified data sets may be used for unduplicated counting, planning and research activities.

All data will be archived from ServicePoint no later than seven years after being entered or after last being modified.

7. Transferability: No right, privilege, license, duty or obligation, whether specified or not in this agreement or elsewhere, can be transferred or assigned, whether or not done voluntarily or done through merger, consolidation or in any other manner, unless the System Administrators or ServicePoint Policy Committee grants approval.

8. Mutuality: This agreement applies to, amongst and between each individual Participants, PHB, the key stakeholders and WCDHS.

9. Limitation of Liability and Indemnification: No party to this agreement shall assume any additional liability of any kind due to its execution of this agreement or participation in the NWSSC/WCDHS HMIS system. It is the intent of the parties that each party shall remain liable, to the extent provided by law, regarding its own acts and omissions; but that no party shall assume additional liability on its own behalf or liability for the acts of any other person or entity, through participation in ServicePoint. The parties specifically agree that this agreement is for the benefit of the parties only and this agreement creates no rights in any third party.

Each party shall indemnify and hold harmless all other parties, as well as the officers, directors, employees, volunteers, and agents of those parties from any actions, liabilities, demands, costs,
and expenses, including court costs and attorneys fees which may arise from that party's negligent, or intentional acts or omissions under this agreement.

10. **Limitation of Liability:** PHB, Key Stakeholders\(^1\), and WCDHS shall not be liable to any member Participant for any cessation, delay or interruption of services, nor for any malfunction of hardware, software or equipment to the extent that any such event is beyond reasonable control. If such an event continues for more than 30 days, the Participant may terminate this agreement immediately upon written notification to the System Administrators, PHB, Key Stakeholders\(^1\), WCDHS and other Participants. If a Participant terminates thereby, the parties shall seek mutual resolution to any dispute.

11. **Disclaimer of Warranties:** The System Administrators make no warranties, expressed or implied, including the warranties or merchantability and fitness for a particular purpose, to any Participant or any other person or entity as to the services of the ServicePoint system or to any other matter.

12. **Term and Termination:** This Agreement shall remain in-force until revoked in writing by either party with 30 days advance written notice. This agreement will be superceded by any additional or alternative agreements presented by PHB, Key Stakeholders\(^1\) and WCDHS.

13. **Amendments and Waivers:** This agreement cannot be altered or modified except in writing signed by the Participant, the System Administrators, PHB, Key Stakeholders and WCDHS. No waiver of any right under this agreement is effective except by a writing signed by the Participant, the System Administrators, PHB, Key Stakeholders and WCDHS. No waiver or breach shall be considered a waiver or breach of any other provision neither of this agreement nor of any subsequent breach or default. Each Participant shall get notice by the System Administrators of any breach or waiver of a breach.

14. **Notices:** All notices, between Participant and System Administrators, under this agreement must be in writing.

15. **Scope of Agreement:** This agreement, together with attachments and any referenced material, is the entire agreement between the parties and is binding upon the parties and any permitted successors or assigns.

16. **Applicable Law:** This agreement is governed by and subject to the laws of the State of Oregon. No legal cause of action arising from this agreement may be brought except in courts with designated jurisdiction over Washington County, OR (Multnomah County, OR).

17. **Display of Notice:** Pursuant to the notice published by the Department of Housing and Urban Development (HUD) on May 2, 2017, Participant will prominently display the Notice to Clients of Uses & Disclosures (Privacy Notice to Clients) in its program offices where intake occurs and will take appropriate steps to ensure that all Clients whose information is entered into or accessed from CMIS/HMIS, read and understand the contents of the Notice. The Notice will be substantially in the form of the **Notice to Clients of Uses & Disclosures**, except that (a) where an Organization’s treatment of information is materially limited by other applicable laws or requirements, the Participant’s Notice must reflect the more stringent requirements, and (b) Participant will update its Notice whenever NWSSC/WCDHS HMIS updates and distributes a...
new form of Notice to Clients of Uses & Disclosures. Participant will provide a written copy of
the Participant's Notice then in effect to any Client who requests it and will provide a copy of
such Notice to all Clients who are asked to sign a Client Consent/Release of Information Form.
Participant will maintain documentation of compliance with these notice requirements by,
among other things, maintaining copies of all Notices it uses and the dates upon which they
were first used.

ASSURANCE

_________________________________________ (Participant) assures that the following fully executed
documents will be on file and available for review.

- The Organization’s Confidentiality Policy.
- The Organization’s Grievance Policy, including a procedure for external review.
- The Organization’s official Privacy Notice for NWSSC/WCDHS HMIS clients.
- Executed Client Release of Information forms.
- Executed Organization Authorizations for Release of Information as needed.
- Certificates of Completion for required training for all NWSSC/WCDHS HMIS Users.
- A fully executed User Agreement for all NWSSC System Users.
- A current copy of the NWSSC/WCDHS HMIS Policy and Procedures.

____________________________________
Signature

____________________________________
Printed Name

____________________________________
Date (mm/dd/YYYY)
NW Social Service Connections
(Washington County, OR)
Agency Participation Agreement

EXTENT OF AGREEMENT
This document represents the entire agreement between the parties and supercedes all prior representations, negotiations or agreements, whether written or oral.

Washington County, Oregon
Department of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63
Hillsboro, OR 97124

PARTICIPANT
(Address)
(Address)
(Address)

________________________
Signature

________________________
Printed Name

________________________
Title

________________________
Date (mm/dd/YYYY)

________________________
Signature

________________________
Printed Name

________________________
Title

________________________
Date (mm/dd/YYYY)
NW Social Service Connections
(Washington County, Oregon)
Security Addendum

This Addendum, effective this the____day of__________, 20___, ("Effective Date") is entered into by Washington County Department of Housing Services (WCDHS) and __________________________ (Organization/Participant).

A. WCDHS and Participant are parties to a Participant Agreement and/or one or more Agreements containing assurances from WCDHS and Participant about the safeguarding of Protected Health Information (PHI) disclosed to, created by or received by Participant in the course of Participant providing services to Participants' Clients. As used herein "Participant Agreement" shall mean each of the Agreements described in the preceding sentence.

B. The parties desire to amend each Participant Agreement to include assurances from Participant concerning electronic PHI, as required by the Security Standards (45 CFR parts 160, 162 and 164) promulgated pursuant to the Health Insurance Portability and Accountability Act.

C. Except as expressly provided below, capitalized terms used herein shall have the meaning given them in the Participant Agreement.

Now therefore, the parties agree as follows:

1. Amendment of Participant Agreement. Each Participant Agreement shall be amended to include the following provisions:

   Compliance with Security Regulations. Beginning no later than April 21, 2005 and continuing thereafter, with respect to any electronic PHI that Participant creates, receives, maintains, or transmits, Business Associate shall:

   a. Implement administrative safeguards, physical safeguards and technical safeguards that reasonably and appropriately protect the confidentiality, integrity and availability of the electronic PHI, as required by the Security Standards;

   b. Ensure that any agent, including a subcontractor, to whom it provides such electronic PHI agrees to implement reasonable and appropriate safeguards to protect it; and

   c. Report to WCDHS any attempt or successful unauthorized access, use, disclosure, modification, or destruction of electronic PHI, or interference with system operations in an information system, of which it becomes aware.

2. No Other Amendment. Except as expressly amended by this Addendum, all remaining terms of each Participant Agreement shall remain in full force and effect.

The parties have caused this Addendum to be executed by their respective, duly authorized representatives.
ADOPTED AND AGREED:

Washington County, Oregon
Department of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63
Hillsboro, OR 97124

PARTICIPANT
(Address)

Signature

Printed Name

Title

Date

Signature

Printed Name

Title

Date
NW Social Service Connections  
(Washington County, Oregon)  
Business Associates Agreement For HIPAA Compliant Agencies  
(HIPAA Addendum)

This Business Associates Agreement is made and executed this the ___ day of __________, 20___, by and between the NWSSC/WCDHS HMIS and ______________________ (hereinafter referred to as “Agency”) located at________________________________________________________.

1. Definitions:

Business Associate. “Business Associate” shall mean WCDHS.

Individual. "Individual” shall have the same meaning as the term “individual” in 45 CFR Section 164.501 and shall include a person who qualifies as a personal representative in accordance with 45 CFR Section 164.502(g).

Protected Health Information. Protected Health Information (“PHI”) means individually identifiable health information maintained and transmitted in any form or medium, including without limitation, all information (including demographic, medical, and financial information) data, documentation, and materials that is created or received by a health care provider, health plan, or health care clearinghouse and relates to: (a) the past, present, or future physical or mental health or condition of an individual; (b) the provision of health care to an individual; (c) the past, present, or future payment for the provision of health care to an individual and that identifies or could reasonably be used to identify an individual. PHI does not include: (1) health information that has been de-identified in accordance with the standards for de-identification provided for in the Privacy Rule, or (2) employment records held by the Agency.


Regulatory References. A reference in this Addendum to a section in the Privacy Rule means the section as in effect or as amended, and for which compliance is required.

Required by Law. Required by Law shall have the same meaning as the term “required by law” in 45 CFR Section 164.501.

Secretary. Secretary means the Secretary of the Department of Health and Human Services or his designee.

2. Purpose:

Agency is or may be subject to the Standards for Privacy of Individually Identifiable Health Information as found at 45 CFR Parts 160 and 164 (the “Privacy Rule”), which provides certain federal regulations for the purpose of protecting certain PHI. Pursuant to the Agency Participation Agreement (the “Agreement”), NWSSC/WCDHS HMIS will provide, for or on behalf of Agency, the products and/or services described in the Agency Participation Agreement (“Covered Services”) and, in the process, may from time to time use, receive, or have access to PHI that it uses, maintains or discloses for Agency or on Agency’s behalf, i.e., as a “Business Associate” of Agency for purposes of the Privacy Rule. As a result, Agency and the NWSSC/WCDHS HMIS enter into this Agreement in order for Agency to comply with the Privacy Rule. The parties agree that NWSSC/WCDHS HMIS services as a Business Associate under this Agreement shall specifically exclude any use, maintenance and/or disclosure of information.
pursuant to a research protocol approved by an Institutional Review Board, which are subject
to the privacy requirements of that research protocol.

3. Permitted Uses and Disclosures of PHI:
Except as provided in Paragraph 4, NWSSC/WCDHS HMIS are permitted and required to use
and disclose any PHI it obtains pursuant to the Agreement or in the process of furnishing the
Covered Services only as described or to provide the Covered Services ("Permitted Uses and
Disclosures"), provided that such use or disclosure would not violate the Privacy Rule if done by
Agency. NWSSC/WCDHS HMIS are prohibited from any use or disclosure beyond the Permitted
Uses and Disclosures without written permission of Agency. NWSSC/WCDHS HMIS will make
reasonable efforts to use, disclose, or request only the minimum necessary PHI to accomplish
the intended purpose.

4. Additional Permitted Uses and Disclosures:
A. Notwithstanding Paragraph 3, NWSSC/WCDHS HMIS may use PHI to perform any data
   Aggregation services permitted by 45 CFR §164.504 (e)(2)(i)(B) or to create a limited data
   set as described in and limited by 45 CFR § 164.514 (e), if allowed by or necessary under
   the Permitted Uses and Disclosures.
B. To report violations of law to appropriate Federal and State authorities, where consistent
   with 45 CFR § 164.502 (j)(1);
C. For any use or disclosure that is necessary for the proper management and administration
   of NWSSC/WCDHS HMIS, NWSCC or to carry out any legal responsibilities.

5. Additional Obligations of NWSSC/WCDHS HMIS
In addition to the foregoing, NWSSC/WCDHS HMIS shall, to the extent required by the Privacy
Rule:
A. Not use or further disclose any PHI other than as permitted or required by the Agreement
   or as required by law;
B. Use and maintain appropriate safeguards to prevent use or disclosure of PHI other than as
   provided by this Agreement or as required by law and shall further implement
   administrative, physical, and technical safeguards to protect the security and
   confidentiality, integrity, and availability, as those terms are defined at 45 CFR § 164.304, of
   PHI that they create, receive, maintain, or transmit on behalf of Agency and prevent its
   unauthorized use or disclosure;;
C. Report to Agency in a reasonably prompt manner any use or disclosure of PHI not provided
   for by the Agreement or as required by law, of which it becomes aware and take all
   reasonable steps to mitigate any harmful effects resulting from such use or disclosure of
   PHI;
D. Ensure that any agents, including without limitation any vendor, to whom the NW Social
   Service Connections provides any PHI agrees to the same restrictions and conditions that
   apply to the NW Social Service Connections with respect to such PHI;
E. Promptly make PHI available to Agency upon request in compliance with the access
   provisions of the Privacy Rule as found at 45 CFR § 164.524;
F. Promptly make PHI available for amendment and incorporate any amendments to the PHI
   maintained by the NW Social Service Connections as required by the Privacy Rule;
G. Maintain data on all disclosures of PHI for which accounting is required by 45 CFR 164.528
   for at least six years after the date of the last such disclosure, and make the data available to
NW Social Service Connections  
(Washington County, Oregon)  
Business Associates Agreement For HIPAA Compliant Agencies  
(HIPAA Addendum)

Agency as necessary for Agency to provide accountings of disclosures in accordance with the Rule;

H. Make its internal practices, books, and records relating to the use and disclosure of PHI available to the Secretary of the Department of Health and Human Services or his/her designee for purposes of determining the Agency's compliance with the Privacy Rule; and

I. At termination of the Agreement, to the extent feasible, recover all PHI in the possession of its agents and subcontractors and return or destroy all of the PHI that NWSSC/WCDHS HMIS still maintains in any form and retain no copies of such information or, if such return or destruction is not feasible in the reasonable judgment of NWSSC/WCDHS HMIS, extend the protections of the Agreement to the remaining PHI and limit further uses and disclosures to those purposes that make the return or destruction of the information infeasible.

J. NWSSC/WCDHS HMIS shall ensure that any of its agents, including a subcontractor, to whom it provides PHI that is created or received by NWSSC/WCDHS HMIS on behalf of Agency, shall agree to the same restrictions and conditions that apply through the Agreement to NWSSC/WCDHS HMIS with respect to such information.

6. **Obligations of Agency:**
Agency shall notify NWSSC/WCDHS HMIS of:

A. Any changes in, or revocation of an authorization by an Individual to use or disclose PHI, to the extent that such changes may affect NWSSC/WCDHS HMIS 's use or disclosure of PHI; and

B. Any restriction to the use or disclosure of PHI that Agency has agreed to in accordance with 45 CFR § 164.55, to the extent that such restriction may affect NWSSC/WCDHS HMIS's use or disclosure of PHI. If possible, Agency shall notify NWSSC/WCDHS HMIS of proposed restrictions prior to accepting them, so the NWSSC/WCDHS HMIS can determine whether the proposed restriction is administrable. Agency shall cooperate with reasonable determinations of administrability by NWSSC/WCDHS HMIS in determining whether to grant or deny a request for restriction.

C. Agency will be solely responsible for the production and distribution of the required Notice of Privacy Practices in accordance with 45 CFR Section 164.520 which is given to all individuals who receive services from the Agency. The Agency will give a copy to NWSSC/WCDHS HMIS and will notify NWSSC/WCDHS HMIS if there are any changes to the Notice of Privacy Practices.

7. **Term:**
This Agreement shall become effective immediately upon execution and, except as hereinafter provided, shall remain in force and effect until the last of the PHI is returned to Agency or destroyed.

8. **Termination of Contract Pursuant to Privacy Rule:**
Notwithstanding any provision of the Agreement to the contrary regarding term or termination, Agency is authorized to terminate the Agreement if it determines that NWSSC/WCDHS HMIS have violated a material term of this Agreement or the Privacy Rule (a “Privacy Breach”) upon compliance with the following:

A. Unless Agency reasonably believes that NWSSC/WCDHS HMIS have already cured the Privacy Breach by remedying the condition leading to or causing the Privacy Breach, Agency
shall give written note ("Notice") to NWSSC/WCDHS HMIS, at the address listed at the top of this Agreement, that the Privacy Breach shall be cured as soon as possible and in any event within twenty (20) days.

B. If it is not possible to cure the Privacy Breach or if Agency has not received satisfactory assurances within twenty (20) days of the date that the Notice is received by NWSSC/WCDHS HMIS has cured the Privacy Breach, then Agency may terminate the Contract if it determines that termination is reasonable and feasible. If Agency determines that termination is not feasible, it may immediately report the problem to the Secretary of the Department of Health & Human Services.

9. Changes to Addendum as required by law:
The parties hereto have acknowledged that this Agreement is entered into in order to comply with the requirements of the Privacy Rule. In the event that the provisions or interpretation of the Privacy Rule are materially changed, or in the event that any other law is enacted or interpreted which materially effects the terms of this Agreement, the parties agree to enter into a mutually acceptable amendment to the Agreement, on or before the effective date of that change, to bring the terms hereof into compliance therewith.

10. Survival.
The respective rights and obligations of NWSSC/WCDHS HMIS under Section 5 shall survive termination of the Agreement.

11. Interpretation.
Any ambiguity in this Addendum shall be resolved in favor of a meaning that permits the Agency to comply with the Privacy Rule.

12. Counterparts.
This Addendum may be executed in counterparts, each of which will be deemed an original, but all of which together will constitute one and the same instrument.
NW Social Service Connections  
(Washington County, Oregon)  
Business Associates Agreement For HIPAA Compliant Agencies  
(HIPAA Addendum)  

HIPAA ADDENDUM TO AGREEMENT BETWEEN  
NWSSC/WCDHS HMIS  
And  

______________________________  
SIGNATURE PAGE  

Washington County, Oregon  
Department of Housing Services  
111 NE Lincoln Street, Suite 200-L, MS-63  
Hillsboro, OR 97124  

PARTICIPANT  

______________________________  
Signature  

______________________________  
Printed Name  

______________________________  
Title  

______________________________  
Date (mm/dd/YYYY)  

APPROVED AS TO FORM  

______________________________  
Signature  

______________________________  
Title  

______________________________  
Date
NW Social Service Connections
(Washington County, Oregon)
User Agreement

Name of User (First & Last): 
Organization: 
Email: Phone:

Statement of Confidentiality
Employees, volunteers, and any other persons with access to NW Social Service Connections CMIS/HMIS are subject to certain guidelines regarding use of ServicePoint™. ServicePoint™ contains personal and private information on individuals and all such information must be treated carefully and professionally by all who access it.

Guidelines for use of ServicePoint include:

- The User shall comply with all data standards and policies and procedures.
- ServicePoint™ User Identification and Passwords must be kept secure and are not to be shared.
- Information obtained from ServicePoint™ is to remain confidential, even if my relationship with the organization listed above changes or concludes for any reason.
- The Covered Homeless Organization (CHO) must post a privacy notice describing its policies and practices for the processing of Protected Personal Information (PPI). The User must offer to explain any information that the individual does not understand, and must provide a copy of its privacy notice to any individual upon request.
- Informed client or guardian consent, as documented by a Release Of Information (ROI) form, is required for any data sharing or disclosure of identifying information and service transactions via ServicePoint™.
- If a client or guardian chooses not to sign a ROI form, all client information must be closed with no exceptions.
- Only general, non-confidential information is to be entered in the “other notes/comments” section of the Client Profile on ServicePoint™. Confidential information, including TB diagnosis, HIV diagnosis or treatment information, domestic violence and mental and/or physical health information, is not permitted to be entered in this section.
- Only Client records pertaining to user’s assigned work duties will be accessed.
- All users agree to adhere to the contract signed by their agency stating that client information will be entered into ServicePoint™ accurately and within five business days of client contact.
- Only individuals that exist as clients under the Organization’s jurisdiction may be entered into ServicePoint™.
- Misrepresentation of the client base by entering known, inaccurate information is prohibited.
- Client records are not to be deleted from ServicePoint™, contact NWSSC CMIS/HMIS System Administrators for appropriate action.
- Discriminatory comments based on race, color, religion, national origin, ancestry, handicap, age, sex, and sexual orientation are not permitted in ServicePoint™. Profanity and offensive language are not permitted in ServicePoint™.
- ServicePoint™ is to be used for business purposes only.
- Transmission of material in violation of any United States Federal or State of Oregon regulations or laws is prohibited and includes material that is copyrighted, legally judged to be threatening or obscene, and considered protected by trade secret. ServicePoint™ will not be used to defraud the Federal, State, or local government or an individual entity or to conduct any illegal activity.
NW Social Service Connections  
(Washington County, Oregon)  
User Agreement

- Any unauthorized use, access or unauthorized modification to ServicePoint™ computer system information or interference with normal system operations will result in immediate suspension of your access to ServicePoint™ and may jeopardize your ServicePoint access and/or your employment status.
- ServicePoint™ shall only be accessed from the Organization’s network, desktops, laptops, mini-computers and any other electronic devices that are web capable. In special circumstances access from remote locations may be permitted after application and approval by both the Agency and System Administrators.
- The User is expected to physically enter the password each time he or she logs on to the system. DO NOT save passwords in auto-complete settings.
- Should the User download client identifiable information in any format, he or she will securely store and/or dispose of all electronic and hardcopy in a manner to protect the client’s personal information. At a minimum this will require the use of strong password protection, preferably including encryption.
- This agreement will be superseded by any additional or alternative agreements presented by NWSSC CMIS/HMIS System Administrators.

Failure to comply with the provisions of this Statement of Confidentiality may result in the termination of the User License or Agency Participation. Your signature below indicates your agreement to comply with this statement of confidentiality. There is no expiration date of this agreement, and may be renewed when System Administrators see the need.

<table>
<thead>
<tr>
<th>HMIS User Signature</th>
<th>Witness Signature</th>
<th>Date</th>
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<tr>
<th>HMIS User Printed Name and Title</th>
<th>Witness Printed Name and Title</th>
<th>Date</th>
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The User Agreement/Statement of Confidentiality should be kept on file at the Organization or returned to the appropriate lead organization when requested. Forms for individuals no longer employed by the Participant should be kept on file for seven years following date of termination. System Administrators may, at any time, monitor compliance.

INTERNAL USE ONLY - Note: Training is required prior to access of User License

__/__/_____ Privacy and Security Training (Date)  
__/__/____  HMIS Basic 101 Training (Date)

Training is complete as indicated by Witness Signature.

________________________________________________________________________

Assign License - User to Mirror

Internal Use Only:  
Login __________________________ Login Provider __________________________
Access Level __________________________ ART License __________________________

Washington County HMIS System Administrator  
Annette M. Evans  
Washington County Department of Housing Services  
111 NE Lincoln Street, MS-63, Hillsboro, OR 97124  
503-846-4760 Annette_Evans@co.washington.or.us
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1. SERVICEPOINT: HMIS SYSTEM

Client Management Information System (CMIS)/Homeless Management Information System (HMIS) is a locally administered, electronic data collection system that stores longitudinal person-level information about persons who access the service system.

City of Portland, Portland Housing Bureau (PHB) has instituted the use of ServicePoint as the HMIS system in response to Congressional Directive and U.S. Department of Housing and Urban Development (HUD) support for Homeless Management Information Systems (HMIS).

ServicePoint (trademarked and copyrighted by Mediware Information Systems) is a web based Client Information System that provides standardized assessment of a Client’s needs, creates individualized service plans and records the use of housing and services which communities can use to determine the utilization of services of participating Service Providers, identify gaps in the local service continuum and develop outcome measurements.

For more information regarding Client/Homeless Management Information Systems (HMIS) Policy and Procedures, please contact the HMIS System Administrator.

2. PROJECT OVERVIEW

NW Social Service Connections (NWSSC) is the administrative entity that governs a multi Continuum of Care implementation of HMIS used to record and share information among service-providers on services provided to homeless and near homeless Clients.

The City of Portland, Portland Housing Bureau (PHB) is the owner and operator of the NWSSC HMIS and serves as the NWSSC System Administrator and custodian of data in the system. The lead organizations for
NW Social Service Connections
(Washington County, Oregon)

HMIS Policies and Procedures

NWSSC are: City of Portland, Portland Housing Bureau (PHB); Multnomah County, Department of County Human Services, School & Community Partnerships (SCP); Clackamas County (CC); and Washington County (WC), and any additional lead organizations in accordance with PHB Intergovernmental Agreements.

The NWSSC System Administrators are ServicePoint dedicated program staffs from PHB, additionally each of the lead organizations have identified staff functioning as ServicePoint System Administrators for their respective jurisdictions.

3. CONTACT INFORMATION

Washington County, Dept. of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63
Hillsboro, OR 97124
http://www.co.washington.or.us/Housing/

System Administrator
Annette M. Evans
503-846-4760
Annette_Evans@co.washington.or.us

Agency Administrator
Jaycanna McVey
503-846-4757
Jaycanna_Mcvey@co.washington.or.us

Portland Housing Bureau
421 SW 6th Avenue, Suite 500
Portland, OR 97204
http://www.portlandonline.com/PHB/

System Administrator
Wendy Smith
503-823-2386
wendy.smith@portlandoregon.gov

4. PURPOSE

This document is to define the general requirements and provide an overview of the HMIS System.

5. SCOPE

These Policies and Procedures apply to ALL Persons or Organizations, using any portion of the HMIS system.

6. GOVERNING PRINCIPLES

6.1. ALL Persons using HMIS are expected to read, understand, and adhere to the most up to date Data Standards; https://www.hudexchange.info/programs/hmis/hmis-data-and-technical-standards/

6.2. ALL Persons using HMIS are expected to read, understand, and adhere to the spirit of these principles, even when the Policies and Procedures do not provide specific direction.

6.3. All information entered into the HMIS system, the Service Providers, Participants, their respective staff, and end users are bound by all applicable federal and state confidentiality regulations and laws that protect the Client records that will be placed on the HMIS system; in accordance with the Participation Agreement.

6.4. Clients may not be denied access to their own records. Clients have the right to see their information on ServicePoint, within the time frame specified in the Privacy Notice to Clients. If a Client requests, the Participant/User must review the information with the client.

6.5. Mediware Information Systems will host our implementation of ServicePoint; all Client information in ServicePoint is encrypted.
6.6. Confidentiality
6.6.1. The rights and privileges of clients are crucial to the success of HMIS. These policies will ensure clients’ privacy without impacting the delivery of services, which is the primary focus of agency programs participating in this project.
6.6.2. Policies regarding client data are founded on the premise that a client owns his/her own personal information and provide the necessary safeguards to protect client, agency, and policy level interests.

6.7. Data Integrity
6.7.1. Client data is the most valuable and sensitive asset of HMIS. These policies will ensure integrity and protect this asset from accidental or intentional unauthorized modification, destruction or disclosure.

6.8. System Availability
6.8.1. The availability of a centralized data repository is necessary to achieve the ultimate system/community wide aggregation of unduplicated statistics. The System Administrators are responsible for ensuring the broadest deployment and availability for participating service providers.

6.9. Compliance
6.9.1. Violation of the policies and procedures set forth in this document will have serious consequences. Any deliberate or unintentional action resulting in a breach of confidentiality or loss of data integrity may result in the withdrawal of system access for the offending entity.

7. DEFINITIONS
7.1. Refer to Homeless Management Information System (HMIS) Data Dictionary and Data Standards Manual for terms used throughout the notice and applicable to HMIS.
7.2. Refer to HMIS Community Data Standards Section 2. Definitions for terms commonly used throughout the Hillsboro, Beaverton Washington County CoC and community but are not included in the HMIS Data Dictionary and Data Standards Manual for HUD definitions.
7.3. Refer to funder or program documentation for terms used by those funders or programs.

8. EQUIPMENT, MATERIALS AND SUPPLIES
8.1. Participating Agencies are responsible for providing their own technical support for all Hardware and Software systems used to connect to HMIS.
8.2. Minimum hardware and software requirements for workstations exist. Contact your local administrator or NWSSC ServicePoint Project Manager for more information.

9. FORMS and DOCUMENTS (incorporated by addendum and subject to change)
9.2. Participation Agreement
9.3. User Agreement
9.4. HMIS Privacy Notice
9.5. Community Data Standards
9.6. Release of Information Authorization Form: shall be used for Clients whom ServicePoint information will be made available to other HMIS participating organizations (not part of the addendum as this is the Organization’s own document).
10. CONFIDENTIALITY & SECURITY

10.1.1. NWSSC HMIS System Administrators have full and complete access to all ServicePoint features and functions for their respective jurisdictions. If it is requested, the NWSCC HMIS System Administrator must be willing to sign the confidentiality oaths of the Affiliated Service Providers.

10.1.2. For all information entered in the HMIS, the Service Providers, Users and Agencies are bound by all applicable federal and state confidentiality regulations and laws that protect the Client records that will be placed in the HMIS.

10.1.3. Any requests for release of information, including court orders and subpoenas, shall be referred to PHB, NWSSC. The Service Provider/User agrees not to release any confidential information received from the HMIS database to any non affiliated service organization or individual.

10.1.4. The Service Provider shall ensure that all staff, volunteers and other persons are issued a unique User ID and password for HMIS and receive confidentiality training on the use of HMIS and applicable confidentiality laws.

10.1.5. The Service Provider is responsible to contact the Agency or System Administrator for revoking, adding or editing User access in a timely manner.

10.1.6. Unauthorized disclosure of Protected Personal Information may be grounds for legal action.

10.1.7. Sharing of HMIS data among Affiliated Service Providers is encouraged but not required. The HMIS data items excluded from sharing include medical, legal, case management, case notes, and file attachments, unless specifically released by Client.

10.1.8. HIPPA Privacy Rules take precedence over HMIS privacy standards. If an agency is a HIPAA covered agency, they must abide by HIPAA regulations.

10.1.9. Creating anonymous records may mean that reports will not provide a true unduplicated count and therefore this option should only be used if absolutely necessary. Please contact the System Administrator for other options.

10.1.10. ServicePoint™ shall only be accessed from the Organization’s network, desktops, laptops, and mini-computers.

10.1.11. NWSSC System Administrators are allowed to access the database from remote locations for purposes specific to their job. All staff that access the database remotely must meet the standards detailed in the System Security (above) and may only access it for activities directly related to their job. These approved remote locations include:

10.1.12. Private Home office to provide system support as needed.

10.1.13. Community Agency offices to support agency use of the system.

10.1.14. Private Hotel Rooms on secure networks when providing services while in the field.

10.1.15. Training Centers when providing services in the field.

10.1.16. Remote Access (In special circumstances access from remote locations may be permitted after application and approval by Agency and System Administrators)

10.1.17. The ServicePoint Remote Access Agreement must be completed and submitted for approval.

10.1.18. The Agency Administrator must review the need for remote access and investigate other options.

10.1.19. If no other valid options are available the Agency Administrator must approve in writing remote access for a user.

10.1.20. Once remote access agreement has been approved and signed by the Agency Administrator a copy will be filed with the System Administrators for final approval.

10.1.21. Remote Access is subject to change at the NWSSC System Administrator’s discretion.

10.1.22. Agency and System Administrators will periodically audit all remote access.

10.1.23. Public Key Infrastructure (PKI)
10.1.24. When a computer is used for ServicePoint, the Service Provider is responsible to contact the System Administrator for the PKI Certificate, password and installation instructions.

10.1.25. When a computer is no longer used for Service Point, the service provider needs to remove the PKI Security Certificate.

11. ROLES AND RESPONSIBILITIES

11.1. If it is requested of the HMIS system administrators he must be willing to sign the confidentiality oaths of the Affiliated Service Providers.

11.2. PHB and the NWSSC System Administrator

11.2.1. Liaison With HUD
11.2.2. Project Staffing
11.2.3. Overall Responsibility For Success Of NWSSC HMIS
11.2.4. Creation Of NWSSC Project Forms And Documentation
11.2.5. NWSSC Project Policies And Procedures And Compliance
11.2.6. Keeper Of Signed Memorandums Of Understanding and Intergovernmental Agreements
11.2.7. Procurement/Renewal of Server Software And Licenses

11.3. ALL Lead Organizations

11.3.1. Liaison with NWSSC System Administrator
11.3.2. Project Staffing
11.3.3. Creation of Local project Forms and Documentation
11.3.4. Data quality reviews
   11.3.4.1. Data Quality
   11.3.4.2. Data Validity
   11.3.4.3. Data Completeness
11.3.5. Adherence To HUD Data Standards
11.3.6. Adherence to Community Data Standards
11.3.7. Adherence to Project Data Standards
11.3.8. User Administration
   11.3.8.1. Manage User Licenses
   11.3.8.2. Process User Agreement forms
11.3.9. Training
   11.3.9.1. Curriculum Development
   11.3.9.2. Training Documentation
   11.3.9.3. Confidentiality Training
   11.3.9.4. Application Training For Agency Administrators and End Users
   11.3.9.5. New Provider training
   11.3.9.6. Upgrade, enhancement, refresher or other training
11.3.10. Outreach/End User Support/Technical Assistance/Password Resets
   11.3.10.1. Password Resets require some sort of user Identity verification.
11.3.11. Coordinate any application customizations with the NWSSC System Administrator
11.3.12. Will use universal naming conventions, in order to better standardize, when creating new assessment questions, sub-assessments, and any other system wide modifications.
11.3.13. All Local documentation including P&Ps and agreements must be no less restrictive than NWSSC documents.

11.4. Contributory HMIS Organization (CHO)Responsibilities:

11.4.1. The CHO must make available to users a secure system to access ServicePoint, including but not limited to firewall and virus protection.
11.4.2. The CHO must be current all related contracts.
11.4.3. The CHO shall follow, comply with and enforce the Agency Agreement.

11.4.4. The CHO shall abide by all data standards and all policies and procedures.

11.4.5. The CHO shall keep abreast of all ServicePoint updates and policy changes.

11.4.6. The CHO shall identify and approve their respective Agency Users.

11.4.7. The CHO shall designate one User to be the Agency’s Key User/Agency Administrator.

11.4.8. The CHO shall be responsible for entering Client data (profile, household, needs, services, referrals, any other Client data you may require), following up on referrals, and running reports in a timely manner.

11.4.9. The CHO shall have representation at agency administrators/regional data quality review meetings.

11.4.10. The CHO shall collect data on all clients as called out in the Data Element Matrix.

11.4.11. CHO Exceptions may include non-homeless CMIS organizations, and DV Comparable database organizations. Please contact the System Administrator for information and waiver.

11.5. User Responsibilities:

11.5.1. The User shall provide an email contact to the System Administrators for communication purposes.

11.5.2. The User shall follow, comply with and enforce the User Agreement.

11.5.3. The User shall comply with all data standards and policies and procedures.

11.5.4. Each User is provided with an access level as required by his/her role. This access level controls who can see which information, lower levels of access allow ONLY viewing of basic demographics, while the middle levels of access allow additional information to be viewed. The highest levels of access are limited to administrators. Confidentiality is a primary concern and these levels of access help control access to information.

11.5.5. Every User of the HMIS system is authenticated with a unique User ID and password. This provides a level of security and accountability for the CHO’s database. Sharing of User IDs or passwords is forbidden.

11.5.6. The User shall only enter individuals in the HMIS database that exist as Clients under the Service Provider's approved area of service. The User shall not misrepresent its Client base in the HMIS database by entering known, inaccurate information. The User shall not knowingly enter false or misleading data under any circumstances.

11.5.7. The User shall consistently enter information into the HMIS database and will strive for Real Time data entry, and be obligated to weekly data entry.

11.5.8. The User will not alter information, with known inaccurate information, in the HMIS database that has been entered by another Service Provider (i.e. Service Provider will not purposefully enter inaccurate information to over-ride information entered by another Service Provider).

11.5.9. The User shall utilize the HMIS database for business purposes only.

11.5.10. The User shall not use the HMIS database with intent to defraud federal, state or local governments, individuals or entities, or to conduct any illegal activity.

11.5.11. The User shall not cause in any manner, or way, corruption of the HMIS database in any manner.

11.5.12. In the event that data entry cannot be made Real Time and the User utilizes hard copy paper forms, once the data has been entered into HMIS, the forms shall be securely stored or suitably disposed of.

11.5.13. The User shall enter data into HMIS

11.5.13.1. Universal Data elements shall be entered on all Clients.

11.5.13.1.1. In addition to the Universal Data elements all HUD Funded CHO Users, at a minimum, shall also enter the additional data elements required by the Data Standards for all Clients.
NW Social Service Connections
(Washington County, Oregon)

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11.5.13.1.2. In addition to the Universal Data elements all City of Portland Funded CHO Users, at a minimum, shall also enter data on all clients as called out in the Data Element Matrix.

11.5.13.1.3. In addition to the Universal Data elements all Continuum of Care OR-506 housing provider Users, at a minimum, shall also enter data on all clients as called out in the Data Element Matrix.

11.5.13.1.4. In addition to the Universal Data elements all Non-HUD funded CHO Users, at a minimum, shall also enter funder or program specific data elements as required.

11.5.14. Sharing data is optional but entering data is not optional. An ROI shall be completed by all clients, even if not sharing data.

11.5.15. The User is responsible for data entry accuracy and correctness.

11.5.16. The User shall log off the HMIS and shut down the browser when not using HMIS.

11.5.17. The User shall utilize the password protected screen savers that automatically turn on to mitigate the burden of shutting down the workstation when momentarily stepping away from the work area.

11.5.18. Report any discrepancies in the use of the HMIS system, including without limitation access of information and entry of information, to the Service Provider Key User or to the System Administrator.

11.5.19. The User shall periodically, when instructed by the Agency or System Administrator, run and review audit reports, making corrections to ensure data accuracy and completeness.

11.6. Key User/Agency Administrator Responsibilities:

11.6.1. The Key User/Agency Administrator shall observe all User Responsibilities.

11.6.2. The Key User/Agency Administrator shall use Agency NewsFlash only for distribution of HMIS information.

11.6.3. The Key User/Agency Administrator shall act as the first level of Service Provider administration and support in the HMIS system.

11.6.4. The Key User/Agency Administrator shall be responsible for the initial training of new Users in his/her Agency.

11.6.5. The Key User/Agency Administrator shall regularly run and review audit reports to ensure policies are being followed by staff.

11.6.6. The Key User/Agency Administrator will be responsible for monitoring all User access within their Agency.

11.7. System Administrators Group

11.7.1. Is made up of at least 1 representative from each of the lead organizations of the NWSSC HMIS and other participant representatives or advocates as invited by the NWSSC Administrators.

11.7.2. Review and make recommendations on all NWSSC HMIS documents, attachments, and related forms

11.7.3. Identify and prioritize system enhancements

11.7.4. Determine the guiding principles that should underlie the HMIS implementation activities of the project and participating organization and service programs

11.7.5. Setting minimum data collection requirements

11.7.6. Encourage continuum-wide provider participation

11.7.7. Facilitate consumer involvement

11.7.8. Recommend criteria, standards, and parameters for the usage and release of all data collected as part of the HMIS

11.7.9. Recommend continuum-level mechanisms for monitoring and enforcing compliance with the approved policies and procedures
NW Social Service Connections  
(Washington County, Oregon)  
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11.7.10. Enhance the implementation and operations of the system for service-providers so they can protect the interests and privacy of their clients
11.7.11. Enhance and improve the quality of data being reported to various levels throughout the Continuum
11.7.12. Create and implement procedures for additional system issues for Participating Agencies.

11.8. **ServicePoint Agency Administrator Group**

11.8.1. Agency Administrator Group will be established for the purpose of addressing implementation and ongoing operational issues.
11.8.2. Identify and prioritizing system enhancements
11.8.3. Providing feedback on system performance
11.8.4. Brainstorming the best uses of the HMIS
11.8.5. Regularly reviewing compliance with all NWSSC HMIS policies, agreements, and other requirements
11.8.6. Reviewing data quality and providing feedback to improve data quality

12. **DATA STANDARDS**

12.2. Homeless Management Information Systems (HMIS); Data and Technical Standards - Final Notice
12.3. Community Data Standards (may be revised at the discretion of the NWSSC System Administrator / Washington County Department of Housing Services System Administrator)
12.4. Data Element Matrix (may be revised at the discretion of the NWSSC System Administrator / Washington County Department of Housing Services System Administrator)

13. **DATA EXPECTATIONS**

13.1. Data will be entered within 5 business days of client contact
13.2. Data will be entered in a timely manner to meet aggregate reporting needs
13.3. Data accuracy will be no less than 95% (The file matches data entry)
13.4. Universal Data Elements Null/Missing Values will not exceed 5%
13.5. Universal Data Elements Refused/Don't Know Values will not exceed 5%
   13.5.1. Refused/Don't Know responses are client identified, not the case manager or data entry person's assessment.
13.6. No outstanding Corrective Actions from last NWSSC HMIS Monitoring

14. **REPORTS/DATA SUBMISSIONS**

14.1. System or Community Wide reporting is done on a regular basis without notification. Refer to the Schedule of aggregate reports pulls document for timelines.
   14.1.1. Electronic Data Transfers may occur, with appropriate agreements in place.
       14.1.1.1. State MDR/OPUS
       14.1.1.2. County/TOURS
       14.1.1.3. Others as needed, with appropriate agreements in place.
14.2. NWSSC HMIS Standard reports include, but are not limited to
   14.2.1. SHAR
   14.2.2. ACDC
   14.2.3. Entry/Exit or CoC-APR
14.3. The Service Provider/User's access to data about Clients it does not serve shall be limited based on the current status of any release of information on file.
14.4. The general public can request non-identifying aggregate and statistical data, by submitting a data request.
14.5. Non-identifying aggregate and statistical data will not contain outliers. Outliers may be removed if they represent less than 5% of any value.
14.6. At a minimum, Password secure any document that includes client name or other PPI. Do not email the password with the file.
14.7. The HMIS System Administrator will address all requests for system or community wide data from entities other than Affiliated Service Providers or clients.
14.8. The System Administrator will run system-wide reports to assess the data, quality and level of participation by Affiliated Service Providers. Results of these reports may be shared with Affiliated Service Providers.
14.9. The System Administrator may run reports for research use. Information in NWSSC HMIS may be used to conduct research related to homelessness and housing programs, service needs, income supports, education and employment, and program effectiveness. Client names and social security numbers will never appear on a research report.

15. PRIVACY REQUIREMENTS

15.1. The CHO must post a sign at each intake desk (or comparable location) that explains generally the reasons for collecting this information.
15.2. The CHO must publish a privacy notice describing its policies and practices for the processing of PPI and must provide a copy of its privacy notice to any individual upon request.
15.3. The CHO must specify in its privacy notice the purposes for which it collects PPI and must describe all uses and disclosures.
15.4. If the CHO maintains a public web page, the CHO must post the current version of its privacy notice on the web page.
15.5. The CHO must post a sign stating the availability of its privacy notice to any individual who requests a copy.
15.6. The CHO must maintain permanent documentation of all privacy notice amendments.
15.7. The CHO must allow an individual to inspect and to have a copy of any PPI about the individual.
15.8. The CHO must offer to explain any information that the individual does not understand.
15.9. The CHO must consider any request by an individual for correction of inaccurate or incomplete PPI pertaining to the individual. The CHO is not required to remove such information but they may mark such information as inaccurate or incomplete or supplement such information.
15.10. The CHO must require each member of its staff (including employees, volunteers, affiliates, contractors and associates) to sign (annually or otherwise) a confidentiality agreement that acknowledges receipt of a copy of the privacy notice and that pledges to comply with the privacy notice.
15.11. The CHO must require each member of its staff (including employees, volunteers, affiliates, contractors and associates) to undergo (annually or otherwise) formal training in privacy requirements.
15.12. The CHO must establish a method, such as an internal audit, for regularly reviewing compliance with its privacy notice.
15.13. The CHO must establish an internal or external appeal process for hearing an appeal of a privacy complaint or an appeal of denial of access or correction rights.
15.14. The CHO must protect HMIS system from malicious intrusion behind a secure firewall.
15.15. The CHO must secure any paper or other hard copy containing PPI that is either generated by or for HMIS, including, but not limited to report, data entry forms and signed consent forms.
NW Social Service Connections
(Washington County, Oregon)
HMIS Policies and Procedures

REVISION HISTORY

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<td>Update to reflect OR-506, Washington County usage</td>
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Washington County HMIS System Administrator
Annette M. Evans
Washington County Department of Housing Services
111 NE Lincoln Street, Suite 200L, MS-63 Hillsboro, OR 97124
503-846-4760, Annette_Evans@co.washington.or.us
This notice tells you about how we use and disclose your private personal information. It tells you about your rights and our responsibilities to protect the privacy of your private personal information. It also tells you how to notify us if you believe that we have violated any of your rights or any of our responsibilities.

We are required by law to maintain the privacy of your private personal information. We must follow the terms of this notice that are currently in effect.

We reserve the right to change this Notice at any time. This Notice is not a legal contract. If this notice is changed, a copy of the revised notice will be available upon request or posted on our website.

You may request a copy of our notice at any time. For more information about our privacy practices, or for additional copies of this notice, please contact us using the information listed at the end of this notice.

We will enter the information you provide our agency into a computerized record-keeping system called ServicePoint. Several local agencies take part in this implementation of ServicePoint™ in order to better organize and deliver services to homeless or near homeless individuals and families. Our goal is to improve efforts to work together to understand and end homelessness. Information you provide will play an important role, including:

• Helping us prioritize, plan, and provide meaningful services to you and your family;
• Assisting our agency to improve its work with families and individuals that are homeless;
• Allowing local agencies to work better together to end homelessness;
• Providing statistics for local, state, and national policy makers to set effective goals.

How your personal information may be used

• Information you provide and services you receive will be entered into ServicePoint.
• Information you provide will be used for administrative and operational purposes to improve, provide and coordinate services that can be offered you.
• Information you provide will be used for functions related to payment or reimbursement for services.
• Information you provide will be used to monitor program effectiveness.
• Information you provide will be used to prepare aggregate reports and statistical information without personal identifying information.
• Information you provide concerning substance abuse, mental health, HIV, and domestic violence will not be shared with NWSSC/WCDHS HMIS Partner agencies, unless specifically authorized by you.
• Personal identifying information will not be disclosed to any third-party, unless authorized by you or required by law.
  o Authorization not required for certain disclosures to government agencies or legal processes
    ▪ Uses and disclosures required by law
    ▪ Public health, health oversight and regulatory agency activities
    ▪ Cases of neglect, abuse or domestic violence
    ▪ Judicial and administrative proceedings
    ▪ Law enforcement investigations
NW Social Service Connections
(Washington County, Oregon)

Notice to Clients of Uses & Disclosures, Privacy Notice to Clients

- Deceased individuals and organ donors
- Serious threats to health or safety
- Disclosure of “de-identified” health information

How will my information be kept secure?

- The computer program we use has the highest degree of security protection available.
- Persons with access to ServicePoint data shall not issue reports containing personal identifying information.
- NWSSC/WCDHS HMIS is governed by federal, state, county, city and local privacy policies. System-wide access to personally identifying information contained in ServicePoint shall be limited System Administrators. System Administrators have been screened and are employed by a lead organization and have an Intergovernmental Agreement in place.
- Personal identifying information, like your name or birth date, will be viewed only by people working to provide services to you, select community service providers when appropriate or by administrators providing technical assistance. Personal identifying information will be removed before reports are issued to local, state, or national agencies.
- All ServicePoint users receive training in privacy protection and have received copies of this privacy policy and have signed a confidentiality agreement pledging to adhere to its requirements.

Know your information rights!

As a Client receiving services from a NWSSC/WCDHS HMIS Participating agency, you have the following rights:

1. **Determine the level of disclosure** of your information; allow or refuse to share your information with NWSSC/WCDHS HMIS participating agencies.
2. **May terminate the Release of Information** at any time, by providing this service provider written notice.
3. **Right to request** entrance into the database as an anonymous client or a restricted client.
4. **Are entitled to a copy of this notice.**
5. **Reasonable accommodation.** The agency you are seeking services from must make reasonable accommodations to ensure that you understand your information rights.
6. **Access to your record.** You have the right to review your ServicePoint record, obtain a printed copy of your data, and have information that you do not understand explained to you.
7. **Correction of your record.** You have the right to have your record corrected so that information is up-to-date, accurate, and to ensure fairness in its use. Disagreements over the accuracy of information shall be subject to the agency grievance process and any uncorrected disagreement shall be noted in your ServicePoint record.
8. **Refusal.** You will not be denied services for which you are otherwise eligible if you refuse to consent to the sharing with other provider agencies of data that has been entered into ServicePoint. If you have safety concerns, please discuss this with a staff member.
9. **Grievance:** You have the right to be heard if you feel that you have been unjustly served, put at personal risk, or harmed. Employees or agencies that misuse information are subject to reprimands, warnings, and dismissal from the NWSSC CMIS/HMIS. The agency must make their written grievance policy available to you.
10. **Data Archival:** All personally identifying data will be archived from ServicePoint no later than seven years after being entered or after last being modified.
NW Social Service Connections
(Washington County, Oregon)

Notice to Clients of Uses & Disclosures, Privacy Notice to Clients

11. **Amendments**: The terms of this privacy notice may be amended at any time and all amendments will be effective with respect to previously obtained information.

12. **Privacy Policy Questions & Complaints**: All questions or complaints regarding this agency's privacy and data security practices may be pursued through the agency grievance process.

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**Washington County HMIS System Administrator**
Annette M. Evans
Washington County Department of Housing Services
111 NE Lincoln Street, Suite 200-L, MS-63, Hillsboro, OR 97124
503-846-4760, Annette_Evans@co.washington.or.us
NW Social Service Connections
(Washington County, Oregon)
Notice to Clients of Uses & Disclosures
Privacy Notice

- Our agency enters personal and demographic information about you into a computerized record-keeping system.
- The information is used to plan delivery of services.
- Information you provide will be used for administrative and operational purposes to improve, provide & coordinate services that can be offered you.
- Information you provide will be used for functions related to payment or reimbursement for services, monitor program effectiveness, and to prepare reports and statistical information without personal identifying information.
- If you have safety concerns, you may not want personal information with other community service providers and should discuss this with a staff member.
- Personally identifying information may be seen by staff members who provide you with services, select community service providers when authorized through a Release of Information (ROI), and a small number of people (i.e.: system administrators) who maintain the computerized record-keeping system, except as required by law.
- You will not be denied services, if you refuse to consent to share data with other community service providers.
- You have the right to see your record and to ask that it be corrected.
- You have the right to file a grievance if you feel you have been harmed in some way by the use of the computerized data system.

THIS IS NOT A COMPLETE STATEMENT OF YOUR INFORMATION RIGHTS. For a complete statement of your information rights, please ask a staff person for a copy of our Privacy Policy. If you have any questions about our computerized record-keeping system and how it might affect you, feel free to talk about your concerns with a staff member.
NW Social Service Connections  
(Washington County, OR)  
HMIS and HIPAA

NWSSC/WCDHS HMIS is not a HIPAA covered entity and therefore not subject to the rules and regulations of HIPAA. HIPAA covered entities may participate in NWSCC/WCDHS HMIS.

HIPAA is the: Health Insurance Portability and Accountability Act of 1996  
A Federal law that allows persons to qualify immediately for comparable health insurance coverage when they change their employment relationships. Title II, Subtitle F, of HIPAA gives HHS the authority to mandate the use of standards for the electronic exchange of health care data; to specify what medical and administrative code sets should be used within those standards; to require the use of national identification systems for health care patients, providers, payers (or plans), and employers (or sponsors); and to specify the types of measures required to protect the security and privacy of personally identifiable health care information. Also known as the Kennedy-Kassebaum Bill, the Kassebaum-Kennedy Bill, K2, or Public Law 104-191.  
(http://www.hhs.gov/ocr/privacy/hipaa/administrative/securityrule/index.html)

HMIS: Homeless Management Information System  
CMIS: Client Management Information System  
A Homeless Management Information System (HMIS) is a software application designed to record and store client-level information on the characteristics and service needs of homeless persons. An HMIS is typically a web-based software application that homeless assistance providers use to coordinate care, manage their operations, and better serve their clients. In order to be competitive for homeless funding administered by the U.S. Department of Housing and Urban Development (HUD), agencies that coordinate a Continuum of Care system must have. If you receive HUD funding, you will be required by your Continuum of Care Coordinator, or HUD, to use the appropriate HMIS.

To be covered by HIPAA, you must be:  
• A health plan;  
• A health care clearinghouse;  
• A health care provider who transmits any health information in electronic form in connection with a covered transaction.

NWSSC/WCDHS HMIS is not a covered entity and because:  
• NWSSC/WCDHS HMIS is not a health plan;  
• NWSSC/WCDHS HMIS is not a clearinghouse;  
• NWSSC/WCDHS HMIS is not a provider of health care;  
• Any agencies/programs that may be covered independent of the HMIS do not use the HMIS for electronic financial collections;  
• NWSSC/WCDHS HMIS does not do any of the standard transactions that would make it be covered by HIPAA.
ALL Persons using HMIS are expected to read, understand, and adhere to
- The Final Revised HMIS Data Standards; July 2017,
- The Department of Housing and Urban Development Homeless Management Information Systems (HMIS); Data and Technical Standards Final Notice; Notice
- All NWSCC/WCDHS HMIS documentation; including but not limited to the HMIS Policies and Procedures and the HMIS Community Data Standards

It is the responsibility of Participants and respective users to ask for all Universal and other required data elements from each client and enter into ServicePoint in a timely manner.

We recognize that it may be difficult to obtain all UDEs for all clients entered into the HMIS. Exceptions may include non-homeless CMIS organizations. Please contact the System Administrator for information and waiver.

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Timely Data Entry (days)</th>
<th>Don’t Know or Refused</th>
<th>Missing Data</th>
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<tr>
<td>Erirable Shelter</td>
<td>3</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Transitional Housing</td>
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<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Permanent Supportive Housing</td>
<td>5</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Homeless Outreach</td>
<td>3</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>Homelessness Prevention and Rapid Re-Housing</td>
<td>5</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Services Only</td>
<td>5</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>Other: Non-Homeless/Non CoC CMIS organizations (i.e. SUN Service System)¹</td>
<td>N/A</td>
<td>10%</td>
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<tr>
<td>Other: Homeless special programs (i.e. Point in Time Counts)¹</td>
<td>N/A</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Other: TBD</td>
<td>N/A</td>
<td>TBD</td>
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<td>Safe Haven</td>
<td>3</td>
<td>10%</td>
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<td>Permanent Housing (i.e. Mod Rehab SRO, Subsidized housing without services)</td>
<td>5</td>
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<td>Overall System wide</td>
<td>5</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

¹ - Data Completeness measured against data elements required by program, NOT against the HUD Universal Data Elements.

Washington County HMIS System Administrator
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1. Introduction to the NWSSC Community Data Standards Notice

As called out in the Final Revised HMIS Data Standards; July 2017
Program Descriptor Data Elements, Universal Data Elements, Program-Specific Data Elements, and
Homelessness Prevention and Re-Housing Program Data Elements; are collected and entered as
appropriate. Based on the special reporting needs of NWSSC, the City of Portland, other program specific
needs, as well as best practices, and our Continuum of Care (OR-506) we are implementing these data
standards at a local level. The intention is to allow for the collection and reporting of standardized client and
program-level data on homeless service usage among programs within our community.

The NWSSC HMIS is the principal source of data for Continuum of Care (OR-506) reporting including, but not
limited to, A Road Home: 10 Year Plan to End Homelessness in Washington County.

2. Definitions

This section defines terms commonly used throughout the community but are not included in the Final
Revised HMIS Data Standards; July 2017 for HUD definitions. This list is not all-inclusive and is subject to
change.

- **AA** – Annual Assessment
- **Adult** – An adult is any person 18 years of age or older.
- **AHAR** – Annual Homeless Assessment Report
- **APR** – Annual Performance Report
- **ART** – Advance Reporting Tool (in ServicePoint)
- **Children** – Children are defined as any person under the age of 18.
NW Social Service Connections
(Washington County, Oregon)
OR-506 HMIS Community Data Standards

- **CHO** – Contributory HMIS Organization
- **Chronically Homeless Single Individual (Chronically Homeless, CH)** – An unaccompanied homeless INDIVIDUAL with a disabling condition who has either been continuously homeless for a year or more OR has had at least four (4) episodes of homelessness in the past three (3) years. The individual must have been on the streets or in an emergency shelter (not transitional housing) during these episodes. Additional comment from HUD: To be considered chronically homeless a person must have been on the streets or in an emergency shelter (NOT transitional housing) for a year or have at least four episodes of homelessness in the past three years. If a chronically homeless person went into a Transitional Housing project and then left to another Transitional Housing project or HUD funded Permanent Housing project they WOULDN’T be considered chronically homeless anymore.
- **Client Consent** – See ROI. Client Consent and ROI are often used interchangeably
- **CMIS** – Client Management Information System
- **CoC** – Continuum of Care
- **CoC APR** - Performance Report/HUD Annual Performance Report (considered a CoC Standard Report)
- **Completeness** – Is the client record complete? In general, an object is complete if nothing needs to be added to it.
- **Data Element Matrix** – Summary of all Data Elements, Subject, Comments/Notes, Values, When Collected, and Program Expectation
- **Data Quality** – Accuracy: Does the File match data entry? Data is of high quality "if they are fit for their intended uses in operations, decision making and planning" (J. M. Juran). Alternatively, the data is deemed of high quality if it correctly represents the real-world construct to which it refers
- **DHS** – See Also WCDHS. Department of Housing Services
- **Domestic Violence** - can be defined as a pattern of abusive behavior in any relationship that is used by one partner to gain or maintain power and control over another intimate partner. Domestic violence can be physical, sexual, emotional, economic, or psychological actions or threats of actions that influence another person. This includes any behaviors that intimidate, manipulate, humiliate, isolate, frighten, terrorize, coerce, threaten, blame, hurt, injure, or wound someone. (Refer to Violence Against Women Act (VAWA) and Department of Justice for more information [http://www.ovw.usdoj.gov/ovw-fs.htm](http://www.ovw.usdoj.gov/ovw-fs.htm))
- **DVRC** – Domestic Violence Resource Center
- **Entry** – ServicePoint procedure used to represent the assistance start date, enrollment in program or point in time that the client becomes reportable
- **ES** – Emergency Shelter
- **ESG** – Emergency Solutions Grant
- **eSNAPS** – Grants management system for HUD’s Homeless Programs
- **Exit** - ServicePoint procedure used to represent the assistance end date, program departure or point in time that the client is no longer reportable
- **HAP** – Housing Assistance Payment
- **HIC** – Housing Inventory Count
- **HMIS** – Homeless Management Information System
- **HMIS Lead** – The entity responsible for the HMIS Implementation. Including but not limited to HUD Compliance, Regulatory Compliance, and responding to CoC directives.
- **Hoh** – Head of Household
- **Homeless** - Federal Definition of Homeless - The United States Code contains the official federal definition of homeless. In Title 42, Chapter 119, Subchapter I, homeless is defined as: §11302. General definition of homeless individual
NW Social Service Connections  
(Washington County, Oregon)  
OR-506 HMIS Community Data Standards

(a) In general
For purposes of this chapter, the term "homeless" or "homeless individual or homeless person" includes-
1. an individual who lacks a fixed, regular, and adequate nighttime residence; and
2. an individual who has a primary nighttime residence that is -
1. a supervised publicly or privately operated shelter designed to provide temporary living accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill);
2. an institution that provides a temporary residence for individuals intended to be institutionalized; or
3. a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings.
(b) Income eligibility
1. In general, a homeless individual shall be eligible for assistance under any program provided by this chapter, only if the individual complies with the income eligibility requirements otherwise applicable to such program.
2. Exception, notwithstanding paragraph (1), a homeless individual shall be eligible for assistance under title I of the Workforce Investment Act of 1998 [29 U.S.C. 2801 et seq.].
(c) Exclusion, for purposes of this chapter, the term "homeless" or "homeless individual" does not include any individual imprisoned or otherwise detained pursuant to an Act of the Congress or a State law.

- HOPWA - Housing Opportunities for Persons with AIDS
- Household (HH) – A single individual or a group of persons who together apply for, enroll in, or receive services.
- Households with Children and Adults - include households composed of at least two persons, one of whom is an adult and one is a child.
- Households with only children - are composed only of persons age 17 or under, including unaccompanied youth, adolescent parents and their children, adolescent siblings, or other household configurations composed only of children.
- Household without Children – A household that does not include any children, including unaccompanied adults, multiple adult households, and pregnant women not accompanied by other children. For the purposes of reporting, households without children that contain multiple persons should be counted as one (1) household without children.
- Leaver –refers to clients who exited and were not in the program on the last day of the reporting period.
- MFI - Median Family Income
- NOFA – Notice of Funding Available
- NWSSC – Northwest Social Services Connection
- PATH – Projects for Assistance in Transition from Homelessness
- PHB – Portland Housing Bureau
- PII –Protected Personal Information (also known as Protected Personal Information, PPI)
- PIT – Point in Time Count
  - Sheltered (ES, TH, SH, RRH, PSH)
  - Unsheltered
- PPI – Protected Personal Information (also known as Personally Identifiable Information, PII)
- Privacy Notice - Notice to Clients of Uses & Disclosures
- Provider /Provider Programs – Organization or Agency and the assistance programs they operate
- PSDE – Program Specific Data Element
- PSH - Permanent Supportive Housing
NW Social Service Connections
(Washington County, Oregon)
OR-506 HMIS Community Data Standards

- **Regulatory compliance** – Do the provider and its users comply with Data Standards and Policies and Procedures? Regulatory compliance describes the goal agencies aspire to in their efforts to ensure that personnel are aware of and take steps to comply with relevant laws and regulations.
- **RHY** – Runaway and Homeless Youth
- **ROI** – Release of Information – includes both ROI paper form and electronic transaction for ROI (electronic release only).
- **RRH** – Rapid Re-Housing
- **S+C/SPC** - Shelter Plus Care
- **ServicePoint** – is the City of Portland, NWSSC Connections and CoC-506 software of choice for HMIS. ServicePoint is a product of Mediware Information Systems, Lenexa, KS. ServicePoint is a web-based management information system that allows agencies, coalitions, and communities to manage (real-time) client and resource data. ServicePoint provides client, service and referral tracking, case management, agency and program indexing, and reporting.
  - **ClientPoint** – A module in ServicePoint that allows Users to enter, edit, view, or print Client information. Additionally, ClientPoint offers features such as building and tracking family relationships, restricting Client records, and conducting case management.
  - **ShelterPoint** – A module specifically designed to provide housing providers an efficient method of managing inventory, viewing area availability, and making referrals.
- **SH** – Safe Haven
- **SSVF** – Supportive Services for Veteran Families
- **Stayer** – refers to clients who were in the program on the last day of the reporting period. This includes clients who exited the program and re-entered the program before the end of the reporting period.
- **System Performance Measures** – (SPM) HUDs prescribed system-level performance measurement tool. Aggregate reporting on all participating Service Providers
- **Transitional Housing** – (The McKinney-Vento Homeless Assistance Act As amended by S. 896 The Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act of 2009) The term ‘transitional housing’ means housing the purpose of which is to facilitate the movement of individuals and families experiencing homelessness to permanent housing within 24 months or such longer period as the Secretary determines necessary. Transitional housing includes housing primarily designed to serve deinstitutionalized homeless individuals and other homeless individuals with mental or physical disabilities and homeless families with children.
- **UDE** – Universal Data Element
- **VA** – Veterans Administrations
- **Victim Service Provider** - a nonprofit, nongovernmental organization that assists domestic violence, dating violence, sexual assault, or stalking victims, including rape crisis centers, domestic violence shelters, faith-based organizations, and other organizations, with a documented history of effective work concerning domestic violence, dating violence, sexual assault, or stalking. Programs that do not identify any of these populations as their primary mission are not considered victim service providers under VAWA and are not exempt from using HMIS.
- **WCDHS** – Washington County Department of Housing Services
- **Youth** – may include both unaccompanied children under 18 years old or youth age 18-24 years old not otherwise served with other adults.
3. Documentation

- Homeless Status
  - Participants and respective users will record information on the homeless status of all clients entered into ServicePoint.
    - Data must be updated in ServicePoint at each program entry or as soon as possible thereafter and at program exit.
  - If a funding program requires that a data element(s) must be collected, then official documentation must be obtained. If the funding source chooses to have these data elements as “optional”, then no official documentation is required (it can be client reported, etc.)
    - SHP funded programs, S+C, SRO – because HUD requires the collection of program-specific data elements (example: 4.3 Physical Disability; 4.4 Developmental Disability; 4.5 Chronic Health Condition; and 4.7 Mental Health) for the purposes of the APR, if the response is “yes”, then the programs are required to obtain official written documentation to back it up.
    - Emergency Shelters – currently no federal funding source requires the collection of program-specific data elements for emergency shelters (only the PSDEs and UDEs are required). Therefore if an emergency shelter chooses to collect any of these data elements, it does NOT require official documentation and it can be client reported, etc.

4. HMIS General Goals

OR-506 Goals include:
- Set common objectives
- Identify indicators/issues for performance measurement and evaluation
- Identify questions suitable for inclusion in community plan evaluations
- Coordinated approach in order to ensure that there is sufficient, consistent and timely information

5. Data Entry Requirements

- It is the responsibility of Participants and respective users to ask for all Universal and other required data elements from each client entered into ServicePoint.
  - Exceptions may include non-homeless CMIS organizations. Please contact the System Administrator for information and waiver.
- Data will be entered in a timely manner, within 5 working days following client contact.
- Blanks, Nulls or “unknown” entries in required fields will not exceed 5% per month.
- Complete and accurate data is essential to the system’s success; however it is important to note exceptions.
  - Clients may refuse to provide information without being denied services.
  - In the case where there is a conflict with collecting data and the provision of quality services and/or client safety, providers should not enter personal identifying information or do so at a later time.
  - HMIS monitoring will include data quality, “Does the file match data entry?” Accuracy will be no less than 95%.
- Although each Participant will use ServicePoint in various capacities, the minimum data fields required for all providers regardless of funding source are detailed in the Data Element Matrix.

6. Shared Outcomes

- Participants will complete all data entry requirements as needed for common goals and objectives reporting
NW Social Service Connections  
(Washington County, Oregon)  
OR-506 HMIS Community Data Standards

- OR - 506 service providers share common goals related to placement and housing retention
  - Placement
  - Housing Outcomes (retention status) at 12 months, unless otherwise indicated by contract.
  - Other information, as needed, subject to change

7. Client Consent

- The Notice to Clients of Uses & Disclosures must be posted and/or given to each client so that he/she is aware of the potential use of his/her information and where it is stored. No consent is required for the functions articulated in the notice.
- Consent of the individual for data collection is inferred for the circumstances of the collection.
  - “We collect personal information directly from you (the client) for reasons that are discussed in our privacy statement. We may be required to collect some personal information by law or by organizations that give us money to operate this program. Other personal information that we collect is important to run our programs, to improve services for homeless persons, and to better understand the needs of homeless persons. We only collect information that we consider to be appropriate.”
- A client has a right to request entrance into the database as an anonymous client or a restricted client.
- A completed Release of Information Form is required prior to any electronic information sharing. The ServicePoint ROI procedure must be transacted to effectively share electronic information appropriately.
  - Clients who choose not to authorize sharing of information cannot be denied services for which they would otherwise be eligible.
  - All Client Authorization for ROI forms related to the HMIS data sharing will be placed in a file to be located on premises.
  - HMIS-related Authorization for ROI forms will be retained for a period of 7 years, after which time the forms will be discarded in a manner that ensures client confidentiality is not compromised.
# REVISION HISTORY

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>01/12/2011</td>
<td>New Document</td>
<td>W. Smith</td>
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<tr>
<td></td>
<td></td>
<td>Community Review/Input 09/23/2010</td>
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<tr>
<td></td>
<td></td>
<td>Legal Review 12/28/2010</td>
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<td>1.0</td>
<td>8/28/2017</td>
<td>Updated terms for OR-506</td>
<td>J.McVey</td>
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**Washington County HMIS System Administrator**

Annette M. Evans  
Washington County Department of Housing Services  
111 NE Lincoln Street, Suite 200-L. MS-63, Hillsboro, OR 97124  
503-846-4760, Annette_Evans@co.washington.or.us
**Section 1: Household**

A. **Household Type:** Select the household type that best describes your household. Please select only one.

- Single Individual
- Grandparent(s) and Child(ren)
- Female Single Parent
- Male Single Parent
- Foster Parent(s)
- Couple with No Children
- Two Parent Family
- Non-Custodial Caregivers
- Other (explain): ________________________________

**B. Household Demographics.** Starting with the Head of the Household, list all members of the household. Use the correct legal name for each member as it appears on his/her Social Security Card or INS documents.

<table>
<thead>
<tr>
<th>Name Last, First, Middle And Social Security Number</th>
<th>Relation to Head of Household</th>
<th>Date of Birth</th>
<th>Gender</th>
<th>Race* (Select as many as apply)</th>
<th>Disability Type* (if applicable)</th>
<th>Health Insurance Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>👑American Indian or Alaskan Native</td>
<td>☐ Alcohol Abuse</td>
<td>☐ MEDIACARE</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ Asian</td>
<td>☐ Developmental Disability</td>
<td>☐ State Insurance/Child or Adult – circle one</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ Black or African-American</td>
<td>☐ Drug Abuse</td>
<td>☐ VA Med Services</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ Native Hawaiian or Pacific Islander</td>
<td>☐ HIV/AIDS</td>
<td>☐ Employer-Provided</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ Other</td>
<td>☐ Mental Illness</td>
<td>☐ COBRA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ White</td>
<td>☐ Physical</td>
<td>☐ Private Pay</td>
</tr>
<tr>
<td></td>
<td>Head of the Household</td>
<td></td>
<td></td>
<td>☐ Hispanic</td>
<td>☐ Chronic Health Cond.</td>
<td>☐ Indian Health Services</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ Non-Hispanic</td>
<td>☐ Other disability not listed</td>
<td>☐ Not insured</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ Yes</td>
<td>☐ Prefer not to answer</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Any individual with a disability or other medical need who needs accommodation with respect to this form should inform (Designated Person/Agency).**

*This information is voluntary and is used for statistical purposes only.*
## Section 2: Contact Information

Mailing Address: 

(City)                    (State)        (Zip)

Telephone: 

Email Address: 

## Section 3: Household Income and Benefits

### A. Income and Cash Benefits

Has any member of the household received any **income or cash benefits** in the last 30 days? ..............................................................  

- Yes  
- No  

If yes, please indicate the monthly amount from each of the following sources:

<table>
<thead>
<tr>
<th>Income Type</th>
<th>Monthly Amount</th>
<th>Who?</th>
<th>Approx. Date Income Began</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alimony or Spousal Support</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>Child Support</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>Earned Income</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>General Assistance</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>Pension</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>Private Disability Insurance</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
</tbody>
</table>

### B. Non-Cash Benefits

Has any member of the household received any **non-cash benefits** in the last 30 days? ..............................................................  

- Yes  
- No  

If yes, please indicate the monthly amount from each of the following sources:

<table>
<thead>
<tr>
<th>Benefit Type</th>
<th>Monthly Amount, if known</th>
<th>Who?</th>
<th>Approx. Date Benefit Began</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Stamps (aka “SNAP”)</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>TANF Child Care Services</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
<tr>
<td>TANF Transportation Services</td>
<td>$</td>
<td>Head of Household</td>
<td></td>
</tr>
</tbody>
</table>

Are you a victim of Domestic Violence? ..............................................................  

- Yes  
- No  
- Prefer not to answer

If so, how long ago? ..............................................................  

Are you fleeing Domestic Violence? ..............................................................  

- Yes  
- No  
- Prefer not to answer

Are you a US Military Veteran? ..............................................................  

- Yes  
- No  
- Prefer not to answer

Are any other household members Veterans? ..............................................................  

- Yes  
- No  
- Prefer not to answer

If so, who?  

Please continue to the next page ➢

Effective 11/07/2016
Section 4: Housing Status and Other Demographics

A. Where have you been living or staying up until today? Please check one:

**Literally Homeless**
- Place not meant for Habitation
- Emergency Shelter (including hotel/motel voucher paid by shelter)
- Safe Haven
- Interim Housing – see instructions

**Transitional & Permanent Housing**
- Hotel or Motel Paid Without Emergency Shelter Voucher
- Owned by me
  - With Subsidy or Without Subsidy
- Permanent Housing for Formerly Homeless Persons
- Rental by me
  - With VASH Housing Subsidy or
  - With GPD TIP Housing Subsidy
  - With Other Housing Subsidy (i.e. Section 8)
  - Without Subsidy

**Institutional Situation**
- Foster Care Home or Group Home
- Hospital (Non-Psychiatric)
- Jail, Prison, or Juvenile Facility
- Long Term Care Facility
- Psychiatric Hospital or Facility
- Substance Abuse Treatment Facility

B. How long have you been staying in the situation above?
- Less than 7 days
- A week or more, but less than a month
- At least a month, but less than 90 days
- More than three months, but less than a year
- One year or longer
- Where were you prior to the checked response above? Approx. date became homeless______

C. How many times have you been on streets, in Emergency Shelter or Safe Haven in the past 3 years? _____

D. Total months on streets, in Emergency Shelter or Safe Haven in the past 3 years ______

E. Can your homelessness be documented by a third party? Yes No Don’t know

F. What is/was the zip code of your last permanent address? ________ Don’t know

G. Are you/your household currently homeless? Yes No

Notice of Use

Agency or Event Name provides services through a variety of funding sources, which may include government grants, public funds, or grants from private foundations. Agency or Event Name is required to collect and report on certain information to account for how these funds are used. In addition, this information may aid the effort to end homelessness by demonstrating how many individuals and families in the area need services.

For this reason, you have been asked to provide the information on this form. The information provided will be entered into a Homeless Management Information System (HMIS) and used to provide statistical information about services provided to homeless persons (or persons at risk of homelessness) in Washington County and the metropolitan area.

Your identifying information will be kept as confidential as possible: it will only be seen by persons supervised by Agency or Event Name, persons in other agencies to which you may be referred for further assistance, and persons administering or auditing the HMIS. All agencies and individuals with access to HMIS must adhere to strictly regulated and controlled confidentiality requirements.

_________________________________________ Date
Signature of the Head of the Household

_________________________________________ Date
Spouse/Other Adult

Effective 11/07/2016
October 10, 2017

FY2017 CoC Program Consolidated Application.

Application Attachment: 1C-4 Public Housing Policy Addressing Homeless Preference

PHA OR022 PUBLIC HOUSING PLAN “HOMELESS PREFERENCE”

The Housing Authority of Washington County, PHA # OR022, provides a preference for homeless persons as outlined in the Administration and Continued Occupancy Policy (ACOP):

- Public Housing Authority (PHA) Plan, Section III Tenant Selection, Part 4.III.B. (page 67 and 68); and
- Section 8 Administrative Plan, Section 4.III.C Selection Method (page 87, 88 and 89).

Attachment: PHA and HCV Plan (Applicable Sections)
If the PHA determines that the family is not eligible for admission (see Chapter 3) at any time while the family is on the waiting list the family will be removed from the waiting list.

If a family is removed from the waiting list because the PHA has determined the family is not eligible for admission, a notice will be sent to the family’s address of record. The notice will state the reasons the family was removed from the waiting list and will inform the family how to request an informal hearing regarding the PHA’s decision (see Chapter 14) [24 CFR 960.208(a)].

PART III: Tenant Selection

4-III.A. Overview
The PHA must establish tenant selection policies for families being admitted to public housing [24 CFR 960.201(a)]. The PHA must not require any specific income or racial quotas for any developments [24 CFR 903.2(d)]. The PHA must not assign persons to a particular section of a community or to a development or building based on race, color, religion, sex, disability, familial status or national origin for purposes of segregating populations [24 CFR 1.4(b)(1)(iii) and 24 CFR 903.2(d)(1)].

The order in which families will be selected from the waiting list depends on the selection method chosen by the PHA and is impacted in part by any selection preferences that the family qualifies for. The availability of units also may affect the order in which families are selected from the waiting list.

The PHA must maintain a clear record of all information required to verify that the family is selected from the waiting list according to the PHA’s selection policies [24 CFR 960.206(e)(2)]. The PHA’s policies must be posted any place where the PHA receives applications. The PHA must provide a copy of its tenant selection policies upon request to any applicant or tenant. The PHA may charge the family for providing a copy of its tenant selection policies [24 CFR 960.202(c)(2)].

PHA Policy
When an applicant or resident family requests a copy of the PHA’s tenant selection policies, the PHA will provide copies to them free of charge.

4-III.B. Selection Method
PHAs must describe the method for selecting applicant families from the waiting list, including the system of admission preferences that the PHA will use.

Local Preferences [24 CFR 960.206]
PHAs are permitted to establish local preferences and to give priority to serving families that meet those criteria. HUD specifically authorizes and places restrictions on certain types of local preferences. HUD also permits the PHA to establish other local preferences, at its discretion. Any local preferences established must be consistent with the PHA plan and the consolidated plan, and must be based on local housing needs and priorities that can be documented by generally accepted data sources [24 CFR 960.206(a)].

PHA Policy
Local preferences used by the PHA include:
Homeless

A homeless applicant is defined as one of the following:

- An individual or household who lacks a fixed, regular, and adequate nighttime residence, meaning:
  - Has a primary residence that is a public or private place not meant for human habitation including a car, park, abandoned building, bus or train station, airport, or camping ground;
  - Is living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels/motels paid for by charitable organizations or by federal, state and/or local government programs); or
  - Is exiting an institution where he/she 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.
  - Was formerly homeless and is now receiving short-term rapid re-housing rental assistance through a program funded by the Emergency Solutions Grant (ESG) or Supportive Services to Veterans and Families (SSVF).

OR

- Any individual or family who:
  - Is fleeing, or is attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or a family member, including a child, that has either taken place within the individual’s or family’s primary nighttime residence; and
  - Has no other residence; and
  - Lacks the resources or support networks, e.g., family, friends, and faith-based or other social networks, to obtain permanent housing.

Verification of Homeless Preference

The PHA will accept either of the following forms of verification that an applicant is homeless:

- A signed letter that specifically states the individual or household is homeless under the definition above, including the date, on letterhead, from:
  - A public safety agency (i.e. local police department); or
  - A social service agency; or
  - The shelter where the applicant family is currently staying
  - The PHA’s verification form, completed by an appropriate agent (if applicable).

Victim of Domestic Violence

"Domestic violence" means actual or threatened physical violence directed against one or more members of the applicant family by a spouse or other member of the applicant's household.

To qualify for this preference:

- The PHA shall determine that the domestic violence occurred within the last 12 months, is of a continuing nature, or poses a continuing threat to the applicant; and
- The applicant shall certify that the person who engaged in such violence will not reside with the applicant family unless the PHA has given advance written approval. If the family is admitted, the PHA may deny or terminate assistance to the family for breach of this certification.
cases, the PHA may admit families that are not on the waiting list, or without considering the family’s position on the waiting list. The PHA must maintain records showing that such families were admitted with special program funding.

**Targeted Funding**
[24 CFR 982.204(e)]

HUD may award a PHA funding for a specified category of families on the waiting list. The PHA must use this funding only to assist the families within the specified category. Within this category of families, the order in which such families are assisted is determined according to the policies provided in Section 4-III.C.

**PHA Policy**
The PHA administers no types of targeted funding.

**Regular HCV Funding**

Regular HCV funding may be used to assist any eligible family on the waiting list. Families are selected from the waiting list according to the policies provided in Section 4-III.C.

**4-III.C. Selection Method**

PHAs must describe the method for selecting applicant families from the waiting list, including the system of admission preferences that the PHA will use [24 CFR 982.202(d)].

**Local Preferences**
[24 CFR 982.207; HCV p. 4-16]

PHAs are permitted to establish local preferences, and to give priority to serving families that meet those criteria. HUD specifically authorizes and places restrictions on certain types of local preferences. HUD also permits the PHA to establish other local preferences, at its discretion. Any local preferences established must be consistent with the PHA plan and the consolidated plan, and must be based on local housing needs and priorities that can be documented by generally accepted data sources.

**PHA Policy**
The PHA has established the following local preferences:

- Terminated HCV Family due to Insufficient Program Funding
- Administrative Preference
- Homeless
- Elderly or Disabled on a Fixed Income or No Income
- Victim of Domestic Violence

**Terminated HCV Family due to Insufficient Program Funding.** Any family terminated from the PHA’s HCV program due to insufficient program funding will be provided this preference.
Administrative Preference

The intent of the Administrative Preference is to provide a mechanism to rapidly provide Housing Choice Voucher rental assistance to program participants in other PHA programs who:

1) Have a need to move from the current unit due to a threat to health or safety (such as to provide protection to a victim of a hate crime or domestic violence, dating violence, stalking, or sexual assault); or

2) Through no fault of their own, are in jeopardy of losing rental assistance due to a lack of funding, a change in client eligibility for services linked to the rental assistance, or other circumstances as approved by the Executive Director; or

3) Are residing in a project-based assistance program (such as Public Housing) and are underoccupied or overcrowded for their unit size, and no replacement unit is available to meet their needs.
   a. “Underoccupied” is defined as a household that does not meet the minimum number of persons for the bedroom size of the unit, according to the Housing Choice Voucher subsidy standards listed in this plan.
   b. “Overcrowded” is defined as a household that exceeds the maximum persons for the bedroom size of the unit, according to the Housing Choice Voucher subsidy standards listed in this plan.

An Administrative preference may be awarded to program participants already residing in units assisted through:

- The Low Rent Public Housing Program, including Section 32 Public Housing Homeownership Program participants and Public Housing Family Self-Sufficiency program participants who are eligible to receive a voucher under the Section 8(y) Housing Choice Voucher Homeownership Program.
- Continuum of Care Rental Assistance (not including transitional or short-term rental assistance with a determined expiration date).

Persons requesting administrative preference may be required to complete and submit an application for rental assistance and be placed on the waiting list prior to voucher issuance.

The awarding of the Administrative Preference must be approved by the Executive Director.

Homeless

A homeless applicant is defined as one of the following:

- An individual or household who lacks a fixed, regular, and adequate nighttime residence, meaning:
  - Has a primary residence that is a public or private place not meant for human habitation including a car, park, abandoned building, bus or train station, airport, or camping ground;
  - Is living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels/motels paid for by charitable organizations or by federal, state and/or local government programs); or

Is exiting an institution where he/she 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.

Was formerly homeless and is now receiving short-term rapid re-housing rental assistance through a program funded by the Emergency Solutions Grant (ESG) or Supportive Services to Veterans and Families (SSVF).

OR

- Any individual or family who:
  - Is fleeing, or is attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or a family member, including a child, that has either taken place within the individual's or family's primary nighttime residence; and
  - Has no other residence; and
  - Lacks the resources or support networks, e.g., family, friends, and faith-based or other social networks, to obtain permanent housing.

Verification of Homeless Preference

The PHA will accept either of the following forms of verification that an applicant is homeless:

- A signed letter that specifically states the individual or household is homeless under the definition above, including the date, on letterhead, from:
  - A public safety agency (i.e. local police department); or
  - A social service agency; or
  - The shelter where the applicant family is currently staying
- The PHA's verification form, completed by an appropriate agent (if applicable).

Elderly or Disabled Household on a Fixed Income or No Income

To qualify as Elderly or Disabled on a Fixed Income or No Income, the head of the household or spouse must be at least 62 years of age or a person with disabilities, and at least 75% of the household income must come from fixed sources, or the household must have no source of cash income (not including non-cash benefits such as food stamps).

A "fixed income" is defined as income of a specified and consistent value that is received at specified and consistent intervals. Types of fixed income include Social Security benefits, VA benefits, pension income, or permanent disability benefits. Other types of fixed income sources may be considered by the PHA on a case-by-case basis.

Verification of Elderly or Disabled on a Fixed Income or No Income Preference

Elderly Status

Elderly status will be verified by the age of the person as shown on photo identification provided by the applicant family.

Disabled Status

Disability status will be verified by one of the following:
HDX SYSTEM PERFORMANCE MEASUREMENT

The CoC submitted in HDX the System Performance Measurement reports on June 3, 2017. Response to questions in Section 3A of the Consolidated Application was prepared using the HDX report.

Dear HDX Team,

This is to let you know that the SysPM Report "FY 2016 (10/1/2015 - 9/30/2016)" in the CoC OR-506 - Hillsboro/Beaverton/Washington County CoC was marked as "Submitted"

Attachment: HDX SPM
## Total Population PIT Count Data

<table>
<thead>
<tr>
<th></th>
<th>2016 PIT</th>
<th>2017 PIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sheltered and Unsheltered Count</td>
<td>571</td>
<td>544</td>
</tr>
<tr>
<td>Emergency Shelter Total</td>
<td>74</td>
<td>56</td>
</tr>
<tr>
<td>Safe Haven Total</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Transitional Housing Total</td>
<td>111</td>
<td>112</td>
</tr>
<tr>
<td>Total Sheltered Count</td>
<td>193</td>
<td>175</td>
</tr>
<tr>
<td>Total Unsheltered Count</td>
<td>378</td>
<td>369</td>
</tr>
</tbody>
</table>

## Chronically Homeless PIT Counts

<table>
<thead>
<tr>
<th></th>
<th>2016 PIT</th>
<th>2017 PIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sheltered and Unsheltered Count of Chronically Homeless Persons</td>
<td>142</td>
<td>150</td>
</tr>
<tr>
<td>Sheltered Count of Chronically Homeless Persons</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Unsheltered Count of Chronically Homeless Persons</td>
<td>131</td>
<td>140</td>
</tr>
</tbody>
</table>

## Homeless Households with Children PIT Counts

<table>
<thead>
<tr>
<th></th>
<th>2016 PIT</th>
<th>2017 PIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sheltered and Unsheltered Count of the Number of Homeless Households with Children</td>
<td>53</td>
<td>56</td>
</tr>
<tr>
<td>Sheltered Count of Homeless Households with Children</td>
<td>34</td>
<td>30</td>
</tr>
<tr>
<td>Unsheltered Count of Homeless Households with Children</td>
<td>19</td>
<td>26</td>
</tr>
</tbody>
</table>

## Homeless Veteran PIT Counts

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sheltered and Unsheltered Count of the Number of Homeless Veterans</td>
<td>62</td>
<td>63</td>
<td>58</td>
</tr>
<tr>
<td>Sheltered Count of Homeless Veterans</td>
<td>35</td>
<td>47</td>
<td>40</td>
</tr>
<tr>
<td>Unsheltered Count of Homeless Veterans</td>
<td>27</td>
<td>16</td>
<td>18</td>
</tr>
</tbody>
</table>
### HMIS Bed Coverage Rate

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Total Beds in 2017 HIC</th>
<th>Total Beds in 2017 HIC Dedicated for DV</th>
<th>Total Beds in HMIS</th>
<th>HMIS Bed Coverage Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Shelter (ES) Beds</td>
<td>96</td>
<td>24</td>
<td>72</td>
<td>100.00%</td>
</tr>
<tr>
<td>Safe Haven (SH) Beds</td>
<td>10</td>
<td>0</td>
<td>10</td>
<td>100.00%</td>
</tr>
<tr>
<td>Transitional Housing (TH) Beds</td>
<td>142</td>
<td>8</td>
<td>124</td>
<td>92.54%</td>
</tr>
<tr>
<td>Rapid Re-Housing (RRH) Beds</td>
<td>140</td>
<td>0</td>
<td>140</td>
<td>100.00%</td>
</tr>
<tr>
<td>Permanent Supportive Housing (PSH) Beds</td>
<td>475</td>
<td>0</td>
<td>475</td>
<td>100.00%</td>
</tr>
<tr>
<td>Other Permanent Housing (OPH) Beds</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Total Beds</strong></td>
<td><strong>863</strong></td>
<td><strong>32</strong></td>
<td><strong>821</strong></td>
<td><strong>98.80%</strong></td>
</tr>
</tbody>
</table>

### PSH Beds Dedicated to Persons Experiencing Chronic Homelessness

<table>
<thead>
<tr>
<th>Chronically Homeless Bed Counts</th>
<th>2016 HIC</th>
<th>2017 HIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of CoC Program and non-CoC Program funded PSH beds dedicated for use by chronically homeless persons identified on the HIC</td>
<td>163</td>
<td>147</td>
</tr>
</tbody>
</table>

### Rapid Rehousing (RRH) Units Dedicated to Persons in Household with Children

<table>
<thead>
<tr>
<th>Households with Children</th>
<th>2016 HIC</th>
<th>2017 HIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>RRH units available to serve families on the HIC</td>
<td>44</td>
<td>39</td>
</tr>
</tbody>
</table>
Rapid Rehousing Beds Dedicated to All Persons

<table>
<thead>
<tr>
<th>All Household Types</th>
<th>2016 HIC</th>
<th>2017 HIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>RRH beds available to serve all populations on the HIC</td>
<td>185</td>
<td>140</td>
</tr>
</tbody>
</table>
Measure 1: Length of Time Persons Remain Homeless

This measures the number of clients active in the report date range across ES, SH (Metric 1.1) and then ES, SH and TH (Metric 1.2) along with their average and median length of time homeless. This includes time homeless during the report date range as well as prior to the report start date, going back no further than October, 1, 2012.

**Metric 1.1:** Change in the average and median length of time persons are homeless in ES and SH projects.

**Metric 1.2:** Change in the average and median length of time persons are homeless in ES, SH, and TH projects.

a. This measure is of the client’s entry, exit, and bed night dates strictly as entered in the HMIS system.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Universe (Persons)</th>
<th>Average LOT Homeless (bed nights)</th>
<th>Median LOT Homeless (bed nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Previous FY</td>
<td>Current FY</td>
<td>Previous FY</td>
</tr>
<tr>
<td>1.1 Persons in ES and SH</td>
<td>541</td>
<td>570</td>
<td>53</td>
</tr>
<tr>
<td>1.2 Persons in ES, SH, and TH</td>
<td>803</td>
<td>865</td>
<td>110</td>
</tr>
</tbody>
</table>

b. Due to changes in DS Element 3.17, metrics for measure (b) will not be reported in 2016.

This measure includes data from each client’s “Length of Time on Street, in an Emergency Shelter, or Safe Haven” (Data Standards element 3.17) response and prepends this answer to the client’s entry date effectively extending the client’s entry date backward in time. This “adjusted entry date” is then used in the calculations just as if it were the client’s actual entry date.

**NOTE:** Due to the data collection period for this year’s submission, the calculations for this metric are based on the data element 3.17 that was active in HMIS from 10/1/2015 to 9/30/2016. This measure and the calculation in the SPM specifications will be updated to reflect data element 3.917 in time for next year’s submission.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Universe (Persons)</th>
<th>Average LOT Homeless (bed nights)</th>
<th>Median LOT Homeless (bed nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Previous FY</td>
<td>Current FY</td>
<td>Previous FY</td>
</tr>
<tr>
<td>1.1 Persons in ES and SH</td>
<td>-</td>
<td>567</td>
<td>-</td>
</tr>
<tr>
<td>1.2 Persons in ES, SH, and TH</td>
<td>-</td>
<td>861</td>
<td>-</td>
</tr>
</tbody>
</table>
Measure 2: The Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness

This measure clients who exited SO, ES, TH, SH or PH to a permanent housing destination in the date range two years prior to the report date range. Of those clients, the measure reports on how many of them returned to homelessness as indicated in the HMIS for up to two years after their initial exit.

<table>
<thead>
<tr>
<th>Exit was from</th>
<th>Total # of Persons who Exited to a Permanent Housing Destination (2 Years Prior)</th>
<th>Returns to Homelessness in Less than 6 Months (0 - 180 days)</th>
<th>Returns to Homelessness from 6 to 12 Months (181 - 365 days)</th>
<th>Returns to Homelessness from 13 to 24 Months (366 - 730 days)</th>
<th>Number of Returns in 2 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exit was from SO</td>
<td>73</td>
<td>2</td>
<td>3%</td>
<td>2</td>
<td>3%</td>
</tr>
<tr>
<td>Exit was from ES</td>
<td>171</td>
<td>19</td>
<td>11%</td>
<td>9</td>
<td>5%</td>
</tr>
<tr>
<td>Exit was from TH</td>
<td>81</td>
<td>1</td>
<td>1%</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Exit was from SH</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Exit was from PH</td>
<td>329</td>
<td>9</td>
<td>3%</td>
<td>4</td>
<td>1%</td>
</tr>
<tr>
<td>TOTAL Returns to Homelessness</td>
<td>654</td>
<td>31</td>
<td>5%</td>
<td>16</td>
<td>2%</td>
</tr>
</tbody>
</table>
Measure 4: Employment and Income Growth for Homeless Persons in CoC Program-funded Projects

Metric 4.1 – Change in earned income for adult system stayers during the reporting period

Measure 3: Number of Homeless Persons

Metric 3.1 – Change in PIT Counts

This measures the change in PIT counts of sheltered and unsheltered homeless person as reported on the PIT (not from HMIS).

<table>
<thead>
<tr>
<th></th>
<th>2015 PIT Count</th>
<th>Most Recent PIT Count</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Total PIT Count of sheltered and unsheltered persons</td>
<td>591</td>
<td>571</td>
<td>-20</td>
</tr>
<tr>
<td>Emergency Shelter Total</td>
<td>71</td>
<td>74</td>
<td>3</td>
</tr>
<tr>
<td>Safe Haven Total</td>
<td>9</td>
<td>8</td>
<td>-1</td>
</tr>
<tr>
<td>Transitional Housing Total</td>
<td>116</td>
<td>111</td>
<td>-5</td>
</tr>
<tr>
<td>Total Sheltered Count</td>
<td>196</td>
<td>193</td>
<td>-3</td>
</tr>
<tr>
<td>Unsheltered Count</td>
<td>395</td>
<td>378</td>
<td>-17</td>
</tr>
</tbody>
</table>

Metric 3.2 – Change in Annual Counts

This measures the change in annual counts of sheltered homeless persons in HMIS.

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Unduplicated Total sheltered homeless persons</td>
<td>815</td>
<td>870</td>
<td>55</td>
</tr>
<tr>
<td>Emergency Shelter Total</td>
<td>531</td>
<td>557</td>
<td>26</td>
</tr>
<tr>
<td>Safe Haven Total</td>
<td>12</td>
<td>12</td>
<td>0</td>
</tr>
<tr>
<td>Transitional Housing Total</td>
<td>286</td>
<td>305</td>
<td>19</td>
</tr>
</tbody>
</table>
## Metric 4.2 – Change in non-employment cash income for adult system stayers during the reporting period

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Number of adults (system stayers)</td>
<td>184</td>
<td>192</td>
<td>8</td>
</tr>
<tr>
<td>Number of adults with increased non-employment cash income</td>
<td>25</td>
<td>39</td>
<td>14</td>
</tr>
<tr>
<td>Percentage of adults who increased non-employment cash income</td>
<td>14%</td>
<td>20%</td>
<td>7%</td>
</tr>
</tbody>
</table>

## Metric 4.3 – Change in total income for adult system stayers during the reporting period

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Number of adults (system stayers)</td>
<td>184</td>
<td>192</td>
<td>8</td>
</tr>
<tr>
<td>Number of adults with increased total income</td>
<td>27</td>
<td>44</td>
<td>17</td>
</tr>
<tr>
<td>Percentage of adults who increased total income</td>
<td>15%</td>
<td>23%</td>
<td>8%</td>
</tr>
</tbody>
</table>

## Metric 4.4 – Change in earned income for adult system leavers

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Number of adults who exited (system leavers)</td>
<td>104</td>
<td>97</td>
<td>-7</td>
</tr>
<tr>
<td>Number of adults who exited with increased earned income</td>
<td>13</td>
<td>25</td>
<td>12</td>
</tr>
<tr>
<td>Percentage of adults who increased earned income</td>
<td>13%</td>
<td>26%</td>
<td>13%</td>
</tr>
</tbody>
</table>

## Metric 4.5 – Change in non-employment cash income for adult system leavers

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Number of adults who exited (system leavers)</td>
<td>104</td>
<td>97</td>
<td>-7</td>
</tr>
<tr>
<td>Number of adults who exited with increased non-employment cash income</td>
<td>22</td>
<td>31</td>
<td>9</td>
</tr>
<tr>
<td>Percentage of adults who increased non-employment cash income</td>
<td>21%</td>
<td>32%</td>
<td>11%</td>
</tr>
</tbody>
</table>
**2017 HDX Competition Report**

**FY2016 - Performance Measurement Module (Sys PM)**

**Metric 4.6 – Change in total income for adult system leavers**

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Number of adults who exited (system leavers)</td>
<td>104</td>
<td>97</td>
<td>-7</td>
</tr>
<tr>
<td>Number of adults who exited with increased total income</td>
<td>33</td>
<td>51</td>
<td>18</td>
</tr>
<tr>
<td>Percentage of adults who increased total income</td>
<td>32%</td>
<td>53%</td>
<td>21%</td>
</tr>
</tbody>
</table>

**Measure 5: Number of persons who become homeless for the 1st time**

**Metric 5.1 – Change in the number of persons entering ES, SH, and TH projects with no prior enrollments in HMIS**

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Person with entries into ES, SH or TH during the reporting period.</td>
<td>665</td>
<td>701</td>
<td>36</td>
</tr>
<tr>
<td>Of persons above, count those who were in ES, SH, TH or any PH within 24 months prior to their entry during the reporting year.</td>
<td>74</td>
<td>85</td>
<td>11</td>
</tr>
<tr>
<td>Of persons above, count those who did not have entries in ES, SH, TH or PH in the previous 24 months. (i.e. Number of persons experiencing homelessness for the first time)</td>
<td>591</td>
<td>616</td>
<td>25</td>
</tr>
</tbody>
</table>

**Metric 5.2 – Change in the number of persons entering ES, SH, TH, and PH projects with no prior enrollments in HMIS**

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Person with entries into ES, SH, TH or PH during the reporting period.</td>
<td>892</td>
<td>868</td>
<td>-24</td>
</tr>
<tr>
<td>Of persons above, count those who were in ES, SH, TH or any PH within 24 months prior to their entry during the reporting year.</td>
<td>146</td>
<td>153</td>
<td>7</td>
</tr>
<tr>
<td>Of persons above, count those who did not have entries in ES, SH, TH or PH in the previous 24 months. (i.e. Number of persons experiencing homelessness for the first time.)</td>
<td>746</td>
<td>715</td>
<td>-31</td>
</tr>
</tbody>
</table>
Measure 6: Homeless Prevention and Housing Placement of Persons defined by category 3 of HUD’s Homeless Definition in CoC Program-funded Projects

This Measure is not applicable to CoCs in 2016.
Measure 7: Successful Placement from Street Outreach and Successful Placement in or Retention of Permanent Housing

Metric 7a.1 – Change in exits to permanent housing destinations

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Persons who exit Street Outreach</td>
<td>248</td>
<td>289</td>
<td>41</td>
</tr>
<tr>
<td>Of persons above, those who exited to temporary &amp; some institutional destinations</td>
<td>9</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>Of the persons above, those who exited to permanent housing destinations</td>
<td>33</td>
<td>26</td>
<td>-7</td>
</tr>
<tr>
<td>% Successful exits</td>
<td>17%</td>
<td>13%</td>
<td>-4%</td>
</tr>
</tbody>
</table>

Metric 7b.1 – Change in exits to permanent housing destinations

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Persons in ES, SH, TH and PH-RRH who exited</td>
<td>668</td>
<td>753</td>
<td>85</td>
</tr>
<tr>
<td>Of the persons above, those who exited to permanent housing destinations</td>
<td>379</td>
<td>394</td>
<td>15</td>
</tr>
<tr>
<td>% Successful exits</td>
<td>57%</td>
<td>52%</td>
<td>-4%</td>
</tr>
</tbody>
</table>

Metric 7b.2 – Change in exit to or retention of permanent housing

<table>
<thead>
<tr>
<th></th>
<th>Submitted FY 2015</th>
<th>Current FY</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Universe: Persons in all PH projects except PH-RRH</td>
<td>515</td>
<td>539</td>
<td>24</td>
</tr>
<tr>
<td>Of persons above, those who remained in applicable PH projects and those who exited to permanent housing destinations</td>
<td>481</td>
<td>488</td>
<td>7</td>
</tr>
<tr>
<td>% Successful exits/retention</td>
<td>93%</td>
<td>91%</td>
<td>-3%</td>
</tr>
</tbody>
</table>
This is a new tab for FY 2016 submissions only. Submission must be performed manually (data cannot be uploaded). Data coverage and quality will allow HUD to better interpret your Sys PM submissions.

Your bed coverage data has been imported from the HIC module. The remainder of the data quality points should be pulled from data quality reports made available by your vendor according to the specifications provided in the HMIS Standard Reporting Terminology Glossary. You may need to run multiple reports into order to get data for each combination of year and project type.

You may enter a note about any field if you wish to provide an explanation about your data quality results. This is not required.
## 2017 HDX Competition Report
### FY2016 - SysPM Data Quality

<table>
<thead>
<tr>
<th></th>
<th>All ES, SH</th>
<th>All TH</th>
<th>All PSH, OPH</th>
<th>All RRH</th>
<th>All Street Outreach</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Number of non-DV Beds on HIC</td>
<td>82</td>
<td>82</td>
<td>82</td>
<td>82</td>
<td>141</td>
</tr>
<tr>
<td>2. Number of HMIS Beds</td>
<td>82</td>
<td>82</td>
<td>82</td>
<td>82</td>
<td>55</td>
</tr>
<tr>
<td>3. HMIS Participation Rate from HIC (%)</td>
<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>39.01</td>
</tr>
<tr>
<td>4. Unduplicated Persons Served (HMIS)</td>
<td>474</td>
<td>505</td>
<td>543</td>
<td>552</td>
<td>128</td>
</tr>
<tr>
<td>5. Total Leavers (HMIS)</td>
<td>415</td>
<td>429</td>
<td>479</td>
<td>491</td>
<td>64</td>
</tr>
<tr>
<td>6. Destination of Don't Know, Refused, or Missing (HMIS)</td>
<td>64</td>
<td>25</td>
<td>29</td>
<td>78</td>
<td>3</td>
</tr>
<tr>
<td>7. Destination Error Rate (%)</td>
<td>15.42</td>
<td>5.83</td>
<td>6.05</td>
<td>15.89</td>
<td>4.69</td>
</tr>
</tbody>
</table>

<table>
<thead>
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# 2017 HDX Competition Report

## Date of PIT Count

| Date CoC Conducted 2017 PIT Count | 1/25/2017 |

## Report Submission Date in HDX

| 2017 PIT Count Submittal Date | 4/27/2017 | Yes |
| 2017 HIC Count Submittal Date | 4/18/2017 | Yes |
| 2016 System PM Submittal Date | 6/3/2017 | Yes |
CoC GOVERNANCE

Policy No.: 578.5-OR506CoC  Approved By: HSSN (the CoC)
Effective Date: April 24, 2003  Revision Date: October 14, 2016
Prepared By: Washington County Department of Housing Services
503-846-4760  http://www.co.washington.or.us/Housing/EndHomelessness/

Policy Authority:
This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN).

Purpose:
Promote community-wide commitment to the goal of ending homelessness.

Standard:
A structure will be established to govern the HSSN (the CoC) and its responsibilities, the HSSN Workgroup (the CoC Board), the CoC Program and preparing the CoC Collaborative grant application, and coordination of the CoC Program in consultation with the Emergency Solution Grant (ESG) program resources.

Scope:
Homeless Provider Agencies and Community Stakeholders.

Authority For Code:
Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act CoC Program regulatory statutes 24 CFR Part 578.1, 578.5, 578.7, 578.9, and 578.95(b).

Responsibilities:

1. HOUSING AND SUPPORTIVE SERVICES NETWORK (HSSN) – THE COC
The mission of the HSSN is to provide a coordinated and comprehensive community planning process to implement a Continuum of Care (CoC) for individuals and families who are at risk or experiencing homelessness and to prevent a return to homelessness. Authorized by subtitle C of title IV of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 113481-11389). [CoC Program 24 CFR 578.1]

Meetings are held the first Wednesday of each month from 8:30 a.m. to 10:00 a.m. at Beaverton City Hall. Agenda’s are posted on public boards, the county website, and distributed via the HSSN email listserv.

Why are we here?
- To promote communitywide commitment to the goal of preventing and ending homelessness through the development of strategic planning that integrates housing and service systems.
- To implement a collaborative and coordinated system to assist homeless persons and persons with special needs obtain housing, supportive services and mainstream programs necessary to achieve self-sufficiency.
- To secure funding to quickly, efficiently and effectively re-house people experiencing homelessness to optimize self-sufficiency.
- The services we provide are important!
How do we do this?

- Define the special needs of the current at-risk and homeless population.
- Develop a network of organizations that meet regularly to provide a framework that is both dynamic and responsive to changing housing and service needs over time.
- Implement strategic and outcomes-based homeless prevention and housing plans. The CoC’s roadmap of strategies and programs is identified in *A Road Home: 10-Year Plan To End Homelessness in Washington County* (2008 to 2018). [http://www.co.washington.or.us/Housing/EndHomelessness/a-road-home.cfm](http://www.co.washington.or.us/Housing/EndHomelessness/a-road-home.cfm)
- Create and sustain sufficient capacity throughout the CoC system to facilitate movement of homeless persons to permanent housing and independent living.
- Prioritizing resources for people with the greatest need, in accordance with “Defining Homeless” in 24 CFR Parts 91 and 578.3, and demonstrate results in reducing the length of homelessness and recidivism.
- Data on homeless demographics. Reference CoC and HMIS Lead roles and responsibilities in HMIS Governance, policy 578.7-OR506CoC.

2. CoC GOVERNANCE STRUCTURE

HSSN (the CoC)

The HSSN is comprised of community stakeholders representing cross-sector public and private housing and provider organizations, victim service providers, faith-based organizations, advocates, business, school district homeless liaisons, mental health and substance addition providers, law enforcement, US Veterans Affairs outreach and case workers, hospital/health clinic, Pacific University, private citizens, homeless/formerly homeless consumers, and the CoC’s HMIS Administrator. The HSSN is a coordinated, inclusive and outcome-oriented community planning process developed to address the components of a CoC system, and designed to serve all homeless subpopulations in the community. The meeting is open to the public and marketed through media, speaker forums, public billboards, the County’s website on homelessness, and the HSSN email listserv. [CoC Program 24 CFR 578.5](http://www.co.washington.or.us/Housing/EndHomelessness/a-road-home.cfm)

The HSSN is facilitated by an elected Chair and Co-Chair positions. The HSSN membership has authority to make the following decisions on behalf of the CoC:

- Elect the Chair and Co-Chair of the HSSN, and Chair of HSSN Subcommittees.
- Adopt the annual CoC Planning Calendar.
- Adopt the annual Work Plan for implementing *A Road Home: 10-Year Plan to End Homelessness in Washington County*.
- Approve Emergency Food and Shelter Program (EFSP) funding formula (by percentage) for shelter, rent assistance, and food/meals.
- Approve submittal of the Annual Homeless Assessment Report (AHAR) to HUD.

HSSN Chair (Facilitator)

The Chair facilitates the HSSN (the CoC) process to include coordination with the HSSN Workgroup, perform selection of guest speakers, coordination and prepare monthly HSSN Agenda, arrange meeting room and catering, preside over the HSSN meeting, prepare and publish minutes, and provide leadership in strategic planning and policy development. The
Chair and Co-Chair will preside over HSSN Workgroup meetings, with one representative from the public agency sector and the other position representing the non-profit sector.

- Elected by consensus vote at the June HSSN Meeting.
- 2-Year Term (July 1- June 30), elected in even number years; e.g. 2014, 2016.

HSSN Co-Chair (Co-Facilitator)
In the absence of the Chair, the Co-Chair will assume the duties of the Chair for the HSSN. The Co-Chair will be required to attend HSSN Workgroup meetings and provide Workgroup report updates at HSSN meetings.

- Elected by consensus vote at the June HSSN Meeting.
- 2-Year Term (July 1- June 30), elected in odd number years; e.g. 2015, 2017.

HSSN Workgroup (the CoC Board)
The Workgroup is representative of the relevant organizations and projects serving homeless subpopulations who meet bi-monthly to perform CoC strategic planning, systems and capacity development, review HMIS data quality, HUD-funded project and system performance outcomes, and system discharge analysis.

In support of 24 CFR 578.7(a)(3) and 24 CFR 578.95(b), the Board membership will serve four-year renewable terms and be comprised of an uneven number of representatives.

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<th>Non-Voting Board Positions</th>
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<tr>
<td>HSSN Workgroup Facilitator <strong>Tie-breaker vote only</strong></td>
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<td>Community Connect Lead Agency</td>
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<td>HMIS Lead Agency</td>
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<th>Voting Board Positions</th>
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<tr>
<td>1. ESG/CDBG/HOME: County or City Agency</td>
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<td>2. Business</td>
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<td>3. Chronic Homeless</td>
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<td>4. Mental Illness</td>
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<td>5. Substance Addiction</td>
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<td>6. Runaway/Unaccompanied Youth</td>
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<td>7. Veterans</td>
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<td>8. Victims of Domestic Violence</td>
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<td>9. Families With Children</td>
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<td>10. Homeless/Formerly Homeless Consumer</td>
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<td>11. Community Corrections or Jail</td>
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<td>12. Development Disabilities</td>
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<td>13. HIV/AIDS</td>
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<td>14. Outreach or Citizen At-Large</td>
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<td>15. Faith-based Organization</td>
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<td>16. McKinney-Vento Homeless Student Liaison</td>
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<td>17. Housing Authority</td>
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<td>18. Mainstream Resource Provider</td>
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The HSSN Chair and Co-Chair are the governance leadership of the Workgroup elected to two-year terms, with recommendations of the Workgroup presented at regular meetings of the HSSN for discussion and approval. The Workgroup reports to the HSSN (the CoC) and complies with the Code of Conduct and Recusal Process.

The Workgroup has authority to make the following decisions on behalf of the CoC, and outside of a regular HSSN meeting:

- Authorize submittal of the annual Point In Time (PIT) and Housing Inventory Chart (HIC) to HUD. At the next regular scheduled HSSN meeting a report is provided.
- Determine project ranking and rating for the CoC Program Homeless Assistance grant application. Authority to determine ranking is based on HSSN scoring results for new projects, and HUD APR performance outcomes for renewal projects.
- Authorize submittal of CoC Program Homeless Assistance grant application to HUD.
- Authorize guest speakers for the HSSN meeting agenda. The focus of guest speakers is to broaden knowledge of HSSN providers in resources, programs, policy, and other activities to include disaster/emergency preparedness.

HSSN Subcommittees

The Subcommittee Chair is elected by the HSSN (the CoC) during a regular scheduled HSSN meeting. Chair of the Subcommittee do not have term limits, and serve until resignation or a request to elect a new Subcommittee chair has been presented and voted upon at a regular schedule HSSN meeting.

The subcommittees work collaboratively to end homelessness through strategic planning, promote access to mainstream programs, optimize self-sufficiency, propose projects, and make recommendation to address gaps or propose events for consideration by the entire HSSN. Joint Subcommittees may be formed or new Subcommittees added to assist the HSSN in meeting their mission and goals. The Subcommittee’s report to the HSSN membership (the CoC). Subcommittees include:

- Children (Homeless Education Network)
- Youth
- Homelessness
- Permanent Housing
- Veterans
- Development Disability Dialogue
- Mental Health and Special Needs Community Consortium
- Seniors
- Workforce Development Workgroup

3. MEMBERSHIP ROLES AND RESPONSIBILITIES

The HSSN is an open and inclusive network of community stakeholders the work in cooperation and coordination to plan and implement the housing and services necessary to end homelessness. Duties of the membership include:

- The full membership participate regularly in monthly HSSN planning meetings, and provide support to program and system development work of the HSSN Workgroup (the
CoC GOVERNANCE

CoC Board) and HSSN Subcommittees focused on addressing specific subpopulation
and/or capacity building.
- Continuum-wide provider participation, homeless/formerly homeless representation, and
citizen participation in the HSSN, the Workgroup and Subcommittees.
- Participate in evaluating program outcomes and prioritizing of public funds for programs.
- Participate in data collection initiatives, to include the Point-in-Time (PIT) homeless
count.
- All CoC Program and Emergency Solution Grant (ESG) programs will participate in data
collection through use of the local Homeless Management Information System (HMIS).
Non-federal funded projects are encouraged to submit data in HMIS, or submit data for
use in reporting outcomes to federal, state and the local 10-Year Plan.
- Consult with State and local government ESG program recipients within the CoC
geographic area on the plan for allocating ESG program funds and reporting on and
evaluating the performance of ESG projects.
- Perform an annual gaps analysis and propose projects for funding to address the needs of
the homeless population and subpopulations in Washington County.
- Provide housing and services in alignment with the Centralized Assessment System.
- Participate in the Consolidated Plan and Fair Housing Plan process.

4. CODE OF CONDUCT AND RECUSAL PROCESS
The implementation of a Code of Conduct for the HSSN, inclusive of the Chair, Co-Chair,
Workgroup, and associated Subcommittees, is an essential element that supports the
inclusive, collaborative, and objective goals of the HSSN. [CoC Program 24 CFR 578.95]
1. Meetings will be open to the public.
2. Members will provide information that is truthful and accurate.
3. Members will be respectful to others at all times.
4. Decision making process will:
   a. Be made by consensus at scheduled meetings.
   b. For non-funding decisions, all members present will have an option to participate in
      the voting, e.g. – selection of chair, co-chair, or other general membership decisions.
   c. For decisions involving funding, one vote per member organization (required
      attendance of at least 6 meetings in past 12 months) and one vote per community at-
      large member.
   d. Conflict of Interest. Members will withdraw/excuse themselves from participating in
decision-making (voting) process concerning awards of grants or provisions of
financial benefit to which such member or his/her organization could have a future
financial interest or involvement.

5. HSSN PLANNING CALENDAR ACTIVITIES
On an annual basis the following activities will occur:
- Invite monthly guest speakers to present information on new or expanding housing
  and service programs, local/state/federal policy, etc.
- In alignment with HUD announced NOFA, public RFP for new projects and schedule
  presentations at the next HSSN meeting. The presentation will include a project
CoC GOVERNANCE

description, how the project fits HUD funding guidelines, and project budget inclusive of HUD funding request. Project scoring is completed by the HSSN.

- In alignment with HUD announced NOFA, complete the McKinney-Vento CoC Program Homeless Assistance grant application. Approval by the Workgroup to submit to HUD.
- January - Perform the Homeless Point-In-Time (PIT) Street and Shelter Count. Prepare the annual CoC Housing Inventory (HIC) and Unmet Bed Need analysis.
- March - Project sponsor agencies present to the HSSN all HUD-funded project performance outcomes. Information to include Annual Progress Report data; e.g. - budget, # people served, project performance measurements, fiscal management of funds, and agency audit.
- May – Perform gaps analysis that will inform the development of annual Work Plan.
- June – Approve annual Work Plan in support of the local 10-Year Plan to End Homelessness.
- August – Workgroup will develop CoC Planning Calendar, review and update HSSN Governance Charter and CoC Written Standards. Approval by the HSSN at the September HSSN meeting.
- December – HMIS Lead will present the Annual Homeless Assessment Report (AHAR). Approval by HSSN to submit to HUD.

6. BUILDING A NETWORK OF PARTNERS

The HSSN has developed collaborative and integrated partnerships with community leaders and advocacy groups to further the community-wide commitment to end homelessness. These partnerships include:

- **Homeless Plan Advisory Committee (HPAC):** A 17-member executive leadership committee appointed by the Board of County Commissioners to provide oversight to the implementation of the 10-year Plan, and to work with the HSSN in developing policy and funding to accomplish the goals outlined in *A Road Home: 10-Year Plan to End Homelessness.*

- **Interfaith Committee On Homelessness (IFCH):** A faith-based consortium includes public and nonprofit partner members. The IFCH promotes education on homelessness to demystify this socioeconomic issue, and to bring together faith-based, public and private sector to partner to provide a safety net and work toward real system solutions that prevent homelessness.

- **Coalition of Housing Advocates (CHA):** A network of housing developers and community advocates focused on increasing affordable housing opportunities for low-income, homeless and persons with disabilities, connecting affordable housing to jobs and transportation, and develop funding and policy to promote affordable housing.

- **Washington County Thrives:** A collaboration of cross-sector partners committed to a thriving county that will only be possible when all residents have access to appropriate nutrition, health and wellness, stable homes, quality education, and economic security.
7. CONTINUUM OF CARE (COC) GOVERNANCE CHART

Housing and Supportive Services Network (HSSN)
Washington County, Oregon

Our community benefits when basic needs are provided for all citizens. The HSSN's coordinated community planning process and implementation of the county’s homeless response system that works effectively to provide housing and services for vulnerable populations with special needs, to prevent and end homelessness, and to prevent a return to homelessness.

HSSN meetings are the 1st Wednesday each month, 8:30 a.m., Beaverton Building, 3rd Floor, 12725 SW Milikan Way, Beaverton
http://www.co.washington.or.us/Housing/EndHomelessness/a-road-home.cfm

Chair Public/Representative
Co-Chair Nonprofit Representative
(Implementation of 10-Year Plan to End Homelessness)

Children Subcommittee
Youth Subcommittee
Homeless Subcommittee
Permanent Housing Subcommittee
Income Support Subcommittee
DD Dialogue
Mental Health and Special Needs Community Consortium
Veterans Subcommittee
Seniors Subcommittee
Washington County Reentry Council

HPAC
Homless Plan Advisory Committee
(Leadership in areas of policy, funding and oversight to the 10-Year Plan To End Homelessness Implementation)

CHA
Coalition of Housing Advocates

ICH
Interfaith Committee on Homelessness

WCT
Washington County Thrives (Poverly)

HSSN
(Continuum of Care for homelessness and persons with special needs)

HSSN Strategic Planning and Discharge Workgroup – The CoC Board
(Administrative oversight of HSSN to include CoC planning and policy)

HMIS Lead/User Group

Annette M. Evans, Washington County Homeless Program Coordinator
Annette_Evans@co.washington.or.us / 503-846-4750 [10/2016]
Policy Authority: This policy is adopted under the authority of the local Continuum of Care (CoC) in Washington County, commonly referred to as the Housing and Supportive Services Network (HSSN).

Purpose: Grant recipients and subrecipients under the Continuum of Care (CoC) Program and the Emergency Solution Grant (ESG) Program must use the coordinated and centralized assessment system (CCAS) established by the HSSN, in accordance with requirements established by HUD, to ensure the screening, assessment and referral of program participants is consistent with the written standards established.

Standard: The HSSN, in consultation with the CoC Program and ESG Program recipients and subrecipients, is responsible for determining how to allocate the CoC and ESG funds; for developing the performance standards and evaluating the outcomes of the local CCAS system and projects assisted by the CoC and ESG Program funds; and coordination and integration, to the maximum extent practicable, with other mainstream resources and programs targeted to homeless people in the area covered by the Continuum of Care to provide a strategic, community-wide system that will prevent and end homelessness for that area.

Scope: HSSN, recipients and subrecipients of CoC and ESG Program funds, the CoC Collaborative Applicant, and the HMIS Lead.


Responsibilities:

1. DEFINITIONS
   1.1 Assessment Specialist is defined to mean any job description that performs assessment duties, as outlined by this policy. The Assessment Specialist may include housing
specialist, outreach worker, and case management positions with Homeless Provider Agencies identified in this policy.

1.2 **Collaborative Applicant** is defined to mean an instrumentality of state or local government, local government, nonprofit, state, or public housing authority that has been designated by the Continuum of Care to collect the required Continuum governance planning activities, data and information from all projects within the geographic area of the Continuum to prepare and apply for a grant.

1.3 **Community Connect** is the name given to the coordinated and centralized assessment system for the Continuum of Care jurisdiction in Washington County, Oregon.

1.4 **Equal Access Rule** 24 CFR Part 5 ensures access for individuals in accordance with their gender identity in programs and shelter. This rule builds upon HUD’s 2012 rule entitled Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity.

1.5 **Homeless Provider Agency (HPA)** is defined as CoC Program and ESG Program recipients and subrecipients, and other homeless prevention and assistance programs that provide housing and/or services.

1.6 **McKinney-Vento Act Local Education Agency (LEA)** is defined as a public board of education or other public authority legally constituted within a State for either administrative control or direction of, or to perform a service function for, public elementary schools or secondary schools in a city, county, township, school district, or other political subdivision of a State, or for a combination of school districts or counties that is recognized in a State as an administrative agency for its public elementary schools or secondary schools.

1.7 **Mobile Assessment** is defined to mean an agency that performs screening and assessment of at imminent risk or homeless individuals using the written standards and tools adopted in this policy. Washington County has identified two mobile assessment agencies that target specific populations:
   a) Boys And Girls Aid “Safe Place Youth Shelter” – runaway and homeless youth.
   b) Luke-Dorf, Inc. “PATH Outreach” – literally homeless adult individuals experiencing a severe mental health crisis; e.g. hospitalized, referred by the Mental Health Crisis Team, etc.

1.8 **Recipient** is defined to mean an applicant that signs a grant agreement with the U.S. Department of Housing and Urban Development (HUD), as defined in Section 424 of the McKinney-Vento Act.

1.9 **Subrecipient** is defined to mean a private nonprofit organization, State or local government, or instrumentality of a State or local government that receives a subgrant
from the recipient to operate a project. The definition of “subrecipient” is consistent with the definition of “project sponsor” found in Section 401 of the McKinney-Vento Act.

2. **COMMUNITY CONNECT**

A coordinated and centralized assessment system, hereafter called **Community Connect**, is a system designed to provide people at imminent risk of homelessness (within 14 days) or experiencing homelessness with a centralized access point and a coordinated intake, assessment and process for referral to housing and services. **Community Connect** operating standards are established in this policy, to include evaluation of the **Community Connect** performance by the HSSN. The same assessment is performed at all access points and utilizes a standardized decision-making process.

**Community Connect** will:

2.1 Cover the geographic area of Washington County, Oregon.

2.2 Be easy to access by individuals and families through Community Action Organization, a nonprofit agency selected by the HSSN to operate as the communitywide access point to the coordinated and centralized assessment system.

2.3 Mobile Assessment is an alternate screening and assessment point that will operate in compliance with the written standards identified in this policy to ensure equity for people receiving screening, assessment and referral to community resources whether people enter the centralized assessment system through **Community Connect** or one of the two authorized mobile assessment agencies.
   a) Luke-Dorf, Inc. – Upon completion of the screening and assessment, the Specialist will contact the **Community Connect** Assessment Specialist to review the assessment score and determine housing referral/placement.
   b) Boys And Girls Aid – Upon completion of the screening and assessment, the agency will make the appropriate housing referral/placement for the unaccompanied homeless youth, to include programs for family reunification, shelter, Transitional Living Program, or referral to **Community Connect** Assessment Specialist if the individual is 18 years or older.

2.4 Use comprehensive and standard assessment tools with written standards to evaluate the eligibility of individuals and families for assistance, and make appropriate housing placement referrals.

2.5 Be well advertised to the public.

2.6 Be data driven using HMIS, and as available, other data sources to compliment planning and evaluation activities of the HSSN.

2.7 At a minimum will include CoC Program and ESG funded projects and activities, and coordinate with mainstream resources and other programs serving homeless.
2.8 Provide placement and accommodation of individuals in a manner that supports the individual’s gender identity, to include Lesbian, Gay, Bisexual, and Transgender (LGBT).

2.9 Be culturally sensitive and provide bi-lingual services, to the extent possible.

3. ALIGNMENT WITH HOUSING AND SERVICES

Community Connect will align with prevention and homeless assistance programs targeted to serve the homeless, to include:

3.1 All CoC Program projects funded under 24 CFR Part 578.23(c)(9).

3.2 All Emergency Solution Grant projects and activities funded under 24 CFR Part 576.400(a).

3.3 Coordination, and to the extent possible system alignment, with other targeted homeless services:
   a) HUD-VASH or Veteran Affairs Supportive Housing
   b) Education for Homeless Children and Youth (EHCY) Grants under title VII-B of the McKinney-Vento Act;
   c) Grants for the Benefit of Homeless Individuals (Section 506 of the Public Health Services Act);
   d) Healthcare for the Homeless (42 CFR Part 51c)
   e) Programs for Runaway and Homeless Youth (Runaway and Homeless Youth Act);
   f) Projects for Assistance in Transition from Homelessness (Part C of title V of the Public Health Service Act)
   g) Services in Supportive Housing Grants (Section 520A of the Public Health Service Act);
   h) Emergency Food and Shelter Program (title III of the McKinney-Vento Act);
   i) Transitional Housing Assistance Grants for Victims of Sexual Assault, DV, Dating Violence, and Stalking Program (Section 40299 of the Violent Crime Control and Law Enforcement Act);
   j) Homeless Veterans Reintegration Program (section 5a1 of the Homeless Veterans Comprehensive Assistance Act);
   k) Domiciliary Care for Homeless Veterans Program (38 U.S.C. 2043)
   l) Veteran Affairs Homeless Providers Grant and Per Diem Program (38 CFR Part 61);
   m) Health Care for Homeless Veterans program (38 U.S.C. 2031);
   n) Homeless Veterans Dental program (38 U.S.C. 2062);
   o) SSVF or Supportive Services for Veteran Families Program (38 DFR Part 62); and

3.4 Coordination and integration with other program resources:
   a) Public housing programs (Section 9)
   b) Housing programs receiving tenant-based or project-based assistance (Section 8).
c) Supportive Housing for Persons with Disabilities (Section 811);
d) HOME Investment Partnerships Program;
e) Temporary Assistance to Needy Families;
f) Health Center programs;
g) State Children’s Health Insurance program;
h) Head Start;
i) Mental Health and Substance Abuse Block Grants;
j) Serviced funded under the Workforce Investment Act; and
k) McKinney-Vento School District Liaisons in Washington County.

4. HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS)
4.1 The Continuum’s HMIS will operate as a semi-open system and comply with data privacy and security standards (24 CFR 580.35) to support the screening, assessment and referral activities of the system.
   a) Compliance with the HSSN Governance Charter adopted by the HSSN; and
   b) HMIS Data Sharing Addendum to the Agency Participation Agreement (see Appendix 10.1).

4.2 To protect the privacy of the homeless participant, the homeless provider agency (HPA) may apply confidentiality filters to the client record in the HMIS system upon intake and enrollment into the HPA’s program.

4.3 Community Action Organization is the lead agency to develop and maintain the screening and assessment tools, as approved by the HSSN and in consultation with the HMIS Lead Agency. Community Action Organization will ensure fidelity to the system standards through:
   a) Training provided to positions performing Screening and Assessment (e.g. homeless outreach workers and site-based Assessment Specialist) on use of policy and procedures as outlined in Section 10; and
   b) Training provided to HMIS Users who will perform Screening and Assessment in HMIS.

4.4 Washington County Department of Housing Services is the HMIS Lead Agency, and will ensure fidelity to the system standards through:
   a) Technical assistance provided to Community Action Organization, as necessary;
   b) Implementation and monitoring of HMIS CoC Participation Agreements;
   c) Prepare and provide daily housing inventory availability report to Community Connect and housing providers aligned with Community Connect;
   d) Implementation of reporting in support of the system performance measurements, and training to Community Action and the CoC Collaborative Applicant on use of the HMIS reporting tools; and
   e) Monitoring of HMIS data quality.
5. OUTREACH AND MARKETING PROCESS

Community Connect is a public marketed system that aligns with the communitywide outreach activities targeted to serve unaccompanied youth, adults and families with children experiencing homelessness and those at imminent risk of homelessness.

5.1 Outreach activities and marketing aligned with the system include:
   a) Family Shelter Network Intake Line administered by Community Action.
   b) ESG-funded (Emergency Solution Grant) outreach staff and outreach activities administered by Luke-Dorf, Inc., HomePlate Youth Services, Just Compassion of East Washington County, and Open Door Counseling Center.
   c) McKinney-Vento Local Education Agencies.
   d) HSSN listserv (the CoC email distribution that includes community stakeholders to include homeless/formerly homeless consumers, private citizens, and providers of housing, supportive services, mainstream resources, faith-based meal sites, health, education, and employment programs).
   e) Washington County website http://www.co.washington.or.us/Housing/EndHomelessness/index.cfm
   f) 211info, a statewide resource and information referral agency.
   g) Severe Weather Shelters/Warming Centers.
   h) Public safety officials; e.g. law enforcement, fire/EMS.

5.2 A flowchart visualizes the flow of homeless individuals through the outreach, screening, assessment, and referral/housing placement process. (Appendix 10.2)

6. SCREENING PROCESS

The screening process will determine at imminent risk of homelessness or homeless status of the individual or families seeking assistance, also referred to as a “household”. Households will be required to meet the federal homeless definition defined in 24 CFR Part 91.5 to be eligible for McKinney-Vento homeless programs aligned with the Community Connect. Eligibility of homelessness for people with developmental disability will be in compliance with 24 CFR Part 582.5 and Part 583.5. Households meeting the State definition (doubled-up or shared-housing) are eligible for non-HUD funded program resources, as available.

To access the Community Connect system:

6.1 Call: 503-640-3263
   a) Phone access available 24 hours daily, staffed by Community Action Organization.
   b) Community Action Organization will complete a screening over the phone to determine homeless eligibility using the written standards identified in the Screening Tool (see Appendix 10.3).
   c) Households actively fleeing domestic violence, dating violence, sexual assault, and stalking will receive information on domestic violence resources to include:
      1. Domestic Violence Crisis Line: 503-469-8620 or 1-866-469-8600 toll free
      2. Portland Women’s Crisis Line: 503-235-5333
OR-506CoC Hillsboro/Beaverton/Washington County, Oregon

“Community Connect”
Coordinated and Centralized Assessment System

d) Households identifying as HIV/AIDS positive will receive information for the central intake at Cascade AIDS Project: 503-278-3834.
e) Veteran individuals and families will receive information for veteran services with:
Washington County Disability, Aging and Veteran Services
Phone contact: 503-846-3060
Veteran Community Resource and Referral Center (CRRC)
308 SW 1st Avenue, Portland, OR 97204.
Phone contact: 503-808-1256 or 1-800-949-1004, Ext. 51256.

6.2 Determination – Eligible for Homeless Assistance
a) A household that meets the homeless definition will receive information and referral to emergency assistance resources, to include prevention, diversion and emergency shelter serving youth or families, to the extent these resources are available; and
b) Households not going into shelter will be scheduled to meet with a Community Connect Assessment Specialist. The meeting will be scheduled within 5 business days from the initial screening defined in this section, with the household receiving information on the date, time and location of the Assessment Specialist meeting.
c) Veterans meeting the HUD homeless definition will be offered an assessment with Community Connect Assessment Specialist for eligibility for veteran and other assistance, as well as contact referral to DAVS and CRRC.
d) Data collected during the screening interview is entered into HMIS, and will be used for assessment purposes and system performance evaluation.

6.3 Determination - Not Eligible for Homeless Assistance
a) A household that does not meet the homeless definition will receive information and referral to available community resources, to include 211info, mainstream resources serving people in poverty, and systems of care as defined in the Building Sustainable Partnerships for Housing matrix (see Appendix 10.4).
b) Data collected during the screening interview is entered into HMIS, and will be used for tracking demographics on populations contacting the Community Connect.

7. ASSESSMENT PROCESS
A meeting with the Assessment Specialist and the household will determine the needs of people seeking homeless assistance, and effectively match each household with the most appropriate resources available to address that household’s particular needs.

7.1 Sheltered Households – Assessment Process
Households in one of five (5) emergency shelters in Washington County, to include three family shelters: Community Action, Family Promise and Good Neighbor Center, Monika’s House for victims fleeing domestic violence, and Safe Place Youth Shelter will be assessed by shelter staff, to include:
a) Shelter staff will complete assessment of housing and service needs using the HMIS Assessment Tool (see Appendix 10.5);
b) With the exception of Monika’s House, the shelter staff will enter household data in HMIS, and upload supporting documentation for Verification of Homelessness and identification (include all that are applicable):
1. Homeless Verification and Self-Declaration of Housing form (see Appendix 10.6)
2. Resource Eligibility and Housing Options form (see Appendix 10.7)
3. Staff Affidavit form (see Appendix 10.8)
4. Photocopy of Identification; e.g. Driver License, Social

c) The Assessment Specialist at Monika’s House will maintain data in the HMIS comparable database for victim of domestic violence data. The Assessment specialist will compile hardcopies of the following documents that will be made available upon referral/housing placement with the Community Connect Assessment Specialist:
1. Homeless Verification and Self-Declaration of Housing form (see Appendix 10.6)
2. Resource Eligibility and Housing Options form (see Appendix 10.7)
3. Staff Affidavit form (see Appendix 10.8)
4. Photocopy of Identification; e.g. Driver License, Social
5. Informed Consent Form

d) The Assessment Specialists from the five (5) shelter facilities will schedule a meeting with Community Connect Assessment Specialist to complete the Scoring Criteria in preparation for the referral/housing placement process outlined in Section 7.3.

7.2 Non-sheltered Households – Assessment Process
a) The household will meet with the Community Connect Assessment Specialist for assessment of need, or a mobile assessment performed by trained outreach workers using the same screening and assessment criteria.

b) With the homeless household, the Assessment Specialist will complete the housing and service needs using the HMIS Assessment Tool (Appendix 10.5) or the Mobile Assessment Specialist duties performed by PATH and other trained outreach workers using the paper Assessment Tool that is later entered into HMIS (Appendix 10.5.a).

c) In HMIS, upload homeless eligibility documentation:
1. Homeless Verification and Self-Declaration of Housing form (see Appendix 10.6)
2. Resource Eligibility and Housing Options form (see Appendix 10.7)
3. Staff Affidavit for Reasonable Accommodation; if applicable (see Appendix 10.8)
4. Photocopy of Identification; e.g. Driver License, Social Security Card, etc.

7.3 The Assessment Tools and Scoring Process For All Households
The Assessment Specialist will determine the appropriate housing and service program using the HMIS Assessment Tool to identify the household needs and strengths.

a) Six categories of the Assessment Tool align with a Assessment Scoring Guide that applies points based on low, medium and high housing barriers and household service needs, and prioritizes which eligible households will receive transitional, rapid rehousing and permanent supportive housing assistance (see Appendix 10.9).

b) The HMIS Assessment tool will apply points in each category of the assessment based on the client response, up to a total of 138 points.
1) Monthly Income and Benefits – 10 points
8. REFERRAL AND HOUSING PLACEMENT PROCESS
The Assessment and Scoring process determines the household referral by Program Type to the appropriate housing project. Referrals are made to open beds and/or programs with capacity to serve in low and moderate housing needs. For homeless households scoring 75 points or higher, the household is referred to housing programs that have open beds and projects that maintain a wait list. When no housing resources are available, the household is advised of other community resources to address basic needs.

Appendix 10.9 includes a matrix used by determination of housing referral based on the assessment score that aligns with the most appropriate program types and referral to housing projects.

Appendix 10.9.a is a report published daily from HMIS that includes all program types and housing projects aligned with Community Connect, and serves as a supporting document to Appendix 10.9. This report mirrors the continuums Housing Inventory Chart (HIC) and provides real-time data on programs with empty beds or capacity to serve additional homeless households.

8.1 Prioritizing Populations for Permanent Housing Placement
The local continuum prioritizes housing and resources in alignment with *A Road Home: 10-Year Plan to End Homelessness in Washington County* and *Opening Doors: Federal Strategic Plan*. The local priority will be delivered in the following order through new resources and turn-over of housing units not dedicated and/or not prioritized for occupancy.

a) **First Priority – Homeless Individuals and Families with a Disability with Long Periods of Episodic Homelessness and Severe Service Needs.** The CoC prioritized new and turn-over non-chronic designated units for persons experiencing chronic homelessness and other vulnerable homeless populations in permanent supportive housing and will comply with recordkeeping requirements for documenting chronic homeless status, in alignment with HUD CPD-16-11\(^1\) (supersedes CPD-14-012). Eligible persons who have experienced fewer than 4 occasions where they have been living or residing in a place not meant for human habitation, a safe haven, or in shelter but where the cumulative time homeless is at least 12 months and has been identified as having severe service needs.

b) Second Priority – Homeless Individuals and Families with a Disability with Severe Service Needs and Length of Time (LOT) Homeless. The CoC will prioritize eligible persons residing in a place not meant for human habitation, a safe haven, or in shelter and has been identified as having severe service needs. The CoC will prioritize people with the longest length of homelessness.

c) Third Priority – Homeless Individuals and Families with a Disability Coming from Places Not Meant for Human Habitation, Safe Haven, or Emergency Shelter without Severe Service Needs and Length of Time (LOT) Homeless. The CoC will prioritize eligible persons residing in a place not meant for human habitation, a safe haven, or in shelter where the person has not been identified as having severe service needs. The CoC will prioritize people with the longest length of homelessness, but there is not a minimum length of time required.

d) Fourth Priority – Homeless Individuals and Families with a Disability Coming from Transitional Housing. The CoC will prioritize eligible persons residing in transitional housing, where prior to residing in the transitional housing had lived in a place not meant for human habitation, shelter or safe haven. This priority includes persons fleeing domestic violence or attempting to flee domestic violence, dating violence, human trafficking, sexual assault, or stalking and prior to residing in that transitional housing they did not live in a place not meant for human habitation, shelter or safe haven.

e) Prioritized Single Wait List. The CoC has a single wait list for permanent supportive housing “tenant-based” programs serving individual and families managed by Washington County Department of Housing Services, with wait lists for permanent supportive housing in “facility-based” programs managed by the project sponsor agency in alignment with this policy and the CoC system operations.

8.2 Determining Housing Placement

a) The Assessment Specialist will enter the household Assessment Score, Housing Status and Household Type into the Program Eligibility Tool (see Appendix 10.10). The Program Eligibility Tool will identify the appropriate Project and Homeless Provider Agency (HPA) that align with the household need and eligibility.

b) Using the HPA Project(s) identified in the Program Eligibility Tool, the Assessment Specialist will view available bed/unit data for the specific project(s) in HMIS. The bed/unit availability data as maintained in HMIS by each Project agency, and published daily by the HMIS Lead Agency.

c) For bed/unit data not maintained in HMIS, the Assessment Specialist will contact the HPA for available bed/unit information.

d) The Assessment Specialist will advise the homeless household of the available program options.

e) The Assessment Specialist will contact the HPA via phone to advise a referral is in process, and confirm the availability of the bed/unit in HMIS. A confirmation email will be sent referencing the unique client I.D. number in HMIS where the results of the screening, assessment and the uploaded Verification of Homelessness and I.D. documentation is stored.
f) The household will be responsible for scheduling an intake briefing with the HPA once the referral has been made by *Community Connect*.

g) The Assessment Specialist will complete entry/exit data in HMIS, and ensure all documentation is scanned and uploaded in HMIS within 24 hours of the Assessment.

### 8.3 Intake and Disposition of Referral/Housing Placement

a) HPA will schedule an Intake Briefing with the household referred by *Community Connect*.

b) HPA will meet with the household and have access to the screening, assessment and related documentation uploaded into HMIS, to include the Verification Of Homelessness and Personal Identification.

c) HPA enrolls the new program participant into the program; OR
d) HPA determines the household is not eligible for the program as a result of an inappropriate referral.

#### 1. HPA will contact the Assessment Specialist who made the initial referral and follow-up with an email documenting the reasons for not accepting the household referral; e.g. sending a non-chronic homeless individual to a program that can only serve persons who meet the federal definition of chronically homeless.

#### 2. The household is referred back to the *Community Connect* Assessment Specialist.

### 8.4 Rapid Rehousing Rent Subsidy Determination

Rapid Rehousing (RRH) is a community-based permanent housing model funded by the CoC Program and the ESG Program. The following outlines the standards adopted for the ESG-RRH program in consultation with the HSSN (see Appendix 10.11), and the standards for the CoC-RRH program.

|-------------------------------------|---------------------------------------------|-----------------------------------|
| U.S. HUD Homeless Definition Populations | Category 1, and 4  
- Literally Homeless  
- Fleeing Domestic Violence | Category 1 and 4  
- Literally Homeless  
- Fleeing Domestic Violence |
| Housing Standard | Units must meet HUD Housing Quality Standards (HQS) | Units must pass HUD Habitability Standards |
| Percentage (%) of rent to be paid by program participant, with utility allowance | The greater of:  
30% of the adjusted gross income, OR  
10 percent of the monthly income | The greater of:  
30% of the adjusted gross income, OR  
10 percent of the monthly income |
| Fair Market Rent Standard | Rent reasonableness | Up to the FMR for a unit |
| Rent Reasonableness Standard | Units in a structure must comply with HUD Rent Reasonableness Standard | Units must comply with HUD Rent Reasonableness Standard |

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2 Refer to eligible populations defined in the HUD NOFA. Addition resource, HUD Guidance released 3/12/2013 regarding Imminent Risk for CoC-RRH [https://www.onecpd.info/resource/2889/rapid-rehousing-esg-vs-coc/](https://www.onecpd.info/resource/2889/rapid-rehousing-esg-vs-coc/)
Move-in Standards | Security deposit not to exceed two (2) months rent | • Rent in Arrears  
| | | • Security deposit |

| Number (#) of months | 0 to 24 Months | 0 to 9 months; Extensions may be granted, but not to exceed 24 months |
| Number (#) of times participant can enroll in RRH | Two (2) episodes of homelessness in five years, but total amount of assistance cannot exceed 24 months | No limit, but total amount of assistance cannot exceed 24 months |
| Supportive Service Limitation | No longer than 6 months after rent assistance stops | No limit, but total amount of assistance cannot exceed 24 months |
| Re-evaluate participant self-sufficiency | At least annually, | At least every 3 months |
| Participant and Case Manager meet to review progress | At least monthly | At least monthly |

9. FAIR HOUSING AND EQUAL ACCESS

9.1 Affirmative Outreach

All individuals and their families, including transgender individuals and other individuals who do not identify with the sex they were assigned at birth, will receive equal access to program, benefits, services and accommodations in accordance with their gender identity without being subjected to intrusive questioning or being asked to provide documentation, in accordance with the HUD final rule entitled “Equal Access in Accordance with an Individual’s Gender Identity in Community Planning and Development Programs.”

Housing and service providers aligned with Community Connect will implement affirmative outreach written procedures in compliance with 24 CFR Part 578.93(c) to include marketing information, information provided to participants, and access to grievance process that informs persons with regard to rights and anti-discrimination based on race, color, ethnicity, religion, sex, gender, sexual orientation, age, national origin, familial status, or disability, and how to obtain access to facilities and services. Shelters and temporary facilities will not separate family members with the exception of facilities that require shared sleeping quarters or bathing facilities and that do not qualify as a dwelling under the Fair Housing Act may operate single-sex shelters unless doing so would violate some other Federal, State or local law. Reasonable accommodations for persons with disabilities must be available in order to ensure disabled participants have an equal opportunity to utilize housing, including shelters, and receive essential services. Greater levels of accessibility may be required for some shelters in compliance with the Americans with Disabilities Act.

Shelter and housing providers shall document and maintain records of compliance with this requirement.
9.2 Nondiscrimination
Housing and service providers will comply with all state and federal statutes relating to nondiscrimination, including the Fair Housing Act, Section 504 of the Rehabilitation Act, Title VI of the Civil Rights Act, Title II of the Americans with Disabilities Act, and Title III of the American with Disabilities Act. Providers may not take any of the following actions based on race, color, national origin, religion, gender, familial status, disability, marital status, source of income, sexual orientation, including gender identity, honorably discharged veterans/military status, and survivors of domestic violence:
• Refuse to rent housing or provide services.
• Make housing or services unavailable.
• Deny a dwelling or service.
• Set different terms, conditions or privileges for rental of a dwelling or obtaining services.
• Provide different housing services or facilities or different services.
• Falsely deny that housing is available for inspection or rental or services are not available.
• Deny anyone access to a facility or service.

At the time of assessment with mobile outreach workers or site-based Assessment Specialist, persons will be advised of their right to file a non-discrimination complaint with the HSSN Workgroup.
• If less than 15 days to the next HSSN Workgroup meeting, the complaint will be added to the next regular business meeting agenda for review and act upon the complaint.
• If more than 15 days to the next HSSN Workgroup meeting, the Chair will call a special meeting to review and act upon the complaint.

10. SCREENER AND ASSESSOR TRAINING
Mobile Assessment Specialists (outreach workers) and site-based Assessment Specialists performing Community Connect screening and assessment are required to complete training to ensure fidelity to the centralized assessment policies and procedures.

10.1 New Hire Training and Orientation: Prior to performing activities that include screening and assessment, training will be provided on the policy and process to perform screening and assessment, with additional training completed as follows:
a) Overview of the housing programs and resources aligned with Community Connect.
b) Training in how to perform and assessment using client-centered approach.
c) Confidentiality/privacy training that includes safety for persons fleeing domestic violence and how to determine program eligibility for appropriate referrals for persons with disabilities.
d) Training on nondiscrimination and how to perform an assessment using a client-centered approach that is culturally and linguistically sensitive.
e) Safety planning and training.
f) ServicePoint HMIS training.
g) Training on how to conduct a trauma-informed assessment. Enroll and complete within 6 months of hire Trauma Informed Care course.
h) Enroll and complete within 6 months of hire the Rent Well course, as this training provides the Assessment Specialist with information that is beneficial to serving people who are at risk of homelessness or have housing barriers.

10.2 Annual Training: In the month of May, conduct annual training for Assessment Specialists. This will include:
   a) Overview of the most recent CoC Housing Inventory Chart (HIC) submitted to HUD, with emphasis on new/future housing resources.
   b) Review of the assessment and referral process to ensure fidelity to the Community Connect policies and procedures.
   c) Confidentiality/privacy training that includes safety for persons fleeing domestic violence and how to determine program eligibility for appropriate referrals for persons with disabilities.
   d) Mental Health First Aid training.
   e) Safety planning and training.

11. PERFORMANCE MEASUREMENTS AND SYSTEM EVALUATION
The HSSN will provide oversight to the Community Connect process to provide transparency for people working in the system and ensure consistency with how people access resources communitywide.

11.1 The HSSN will measure project and system performance outcomes based on seven criteria:
   a) Reduction in the Average Length of Time Persons remain Homeless
   b) Reduction in Recidivism
   c) Reduction in First-time Homelessness
   d) Reduction in Unsheltered Homelessness
   e) Increase in Earned Income
   f) Increase in Mainstream Benefits
   g) Increase in Placement to Permanent Housing from Outreach, and Placement in or Retention of Permanent Housing

11.2 Measurement period will be on a federal fiscal year, to align with Annual Homeless Assessment Report submitted to HUD.

11.3 Semi-annually, the HSSN will review the outcomes of the system performance measurement.

11.4 Target goals for system performance will be measured annually beginning October 1 to September 30, with CoC goals:
   a) Average length of homelessness ≤30 days, or a reduction by at least 10 percent from the preceding federal fiscal year.
   b) Less than 5 percent recidivism within two year period, or homeless again within two years decreased by at least 20 percent from the preceding year.
   c) HMIS bed coverage rate is greater than 80 percent.
d) Outreach plan is comprehensive in identifying and referring homeless individuals and families to *Community Connect*.

12.0 APPENDICES
Note: Appendix documents will retain their 10.x designation as CoC members have integrated into their daily language referring to these documents by their Appendix number; e.g. 10.10 is commonly known as the form that defines program eligibility and referral contact information.

10.1 HMIS Data Sharing Addendum to the Agency Participation Agreement
10.2 Community Connect Screening and Intake Flow Chart
10.3 Screening Tool
10.4 Building Sustainable Partnerships for Housing Matrix
10.5 Assessment Tool (ServicePoint HMIS)
10.5.a Assessment Tool (Paper Form used by Outreach Staff)
10.6 Homeless Verification and Self-Declaration of Housing form
10.7 Resource Eligibility and Housing Options form
10.8 Staff Affidavit Form
10.9 Assessment Scoring Guide
10.9.a HMIS Occupied Beds Summary
10.10 Program Eligibility Tool
10.11 Emergency Solution Grant Operating Manual
Effective __________________ (mm/dd/YYYY), this Agreement is added as an amendment to the Agency Participation Agreement between the Washington County, Oregon Department of Housing Services (WCDHS), as part of NW Social Service Connections CMIS/HMIS, and _________________ (Organization Name), herein referred to as “Participant”.

In order to ensure adequate access to program data and to facilitate communication and collaboration between all programs participating in Community Connect, and a coordinated and centralized assessment system, certain data entered into the Homeless Management Information System (HMIS) will be shared with all Community Connect participating agencies. Community Connect agencies included under this agreement are:

**Community Connect Participating Agencies**
The following agencies participate in Community Connect by accepting referrals:

- Boys and Girls Aid
- Bridges to Change
- Cascade AIDS Project
- Community Action Organization
- Family Promise
- Good Neighbor Center
- Jubilee Transition Homes
- LifeWorks NW
- Lutheran Community Services NW
- Sequoia Mental Health Services
- The Salvation Army Veterans and Family Center
- Washington County Department of Housing Services

**Community Connect Intake Agencies**
The following agencies will conduct intake activities for Community Connect:

- Community Action Organization
- Luke-Dorf
- Boys And Girls Aid

Participant agrees that certain data elements collected at intake, and the outcome of any referral(s) made through Community Connect, will be shared with participating agencies. These are listed in Attachment 1 to this Agreement.

Participant agrees that data added to HMIS, or updated, by participating Community Connect agencies will not be shared (with the exception of agencies already sharing data under other data sharing agreements).

Participant’s are required to inform clients that their information will be entered into HMIS and that some of the information is shared with other agencies that do similar work. Client consent is required prior to sharing data.
Furthermore, Participant:

☐ Acknowledges that in transmitting, receiving, storing, processing or otherwise dealing with any consumer protected information, they are fully bound by state and federal statute or regulations governing confidentiality of patient records, including the Federal Law of Confidentiality for Alcohol and Drug Abuse Patients, (42 CFR, Part 2) and the Health Insurance Portability and Accountability Act of 1996 ('HIPAA', 45 CFR, Parts 160 & 164), and cannot use or disclose the information except as permitted or required by this agreement or by law.

☐ Acknowledges that they are prohibited from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by state and federal regulations governing confidentiality of patient records, including the Federal Law of Confidentiality for Alcohol and Drug Abuse Patients, (42 CFR, Part 2) and the Health Insurance Portability and Accountability Act of 1996 ('HIPAA', 45 CFR Parts 160 & 164), A general authorization for the release of information is NOT sufficient for this purpose.

☐ Agrees to use appropriate safeguards to prevent the unauthorized use or disclosure of the protected information.

☐ Agrees to endeavor to notify each of the other participating agencies, within one business day, of any breach, use, or disclosure of the protected information not provided for by this agreement.

☐ Agrees to adhere to the standards outlined within the Health Insurance Portability and Accountability Act of 1996 ('HIPAA', 45 CFR, Parts 160 & 164) and pertinent federal regulations which provide consumers access to their protected information, (164.524), the right to amend protected information (164.526), and receive an accounting of disclosures of protected information (164.528).

☐ Agrees to notify each of the other participating agencies of their intent to terminate their participation in this agreement.

☐ Agrees to resist, through judicial proceedings, any judicial or quasi-judicial effort to obtain access to protected information pertaining to consumers, unless expressly provided for in state and/or federal regulations. The Parties agree to give notice of such action as with any other security breach or unplanned disclosure.

☐ Agrees to continue to adhere to all requirements under the Agency Participation Agreement, including the NW Social Services Connections CMIS/HMIS Policies and Procedures, including Section 22. Client Consent, which has been amended below to read as follows:

22. Client Consent

• Participant agrees that the Notice to Clients of Uses & Disclosures shall be posted and/or given to each client so that he/she is aware of the potential use of his/her information and where it is stored. No consent is required for the functions articulated in the notice.
“COMMUNITY CONNECT”
Washington County, Oregon Continuum of Care (OR-506)
as part of NW Social Service Connections
Data Sharing Addendum to the Agency Participation Agreement

- Consent of the individual for data collection is inferred for the circumstances of the collection.
  - “We collect personal information directly from you (the client) for reasons that are discussed in our privacy statement. We may be required to collect some personal information by law or by organizations that give us money to operate this program. Other personal information that we collect is important to run our programs, to improve services for homeless persons, and to better understand the needs of homeless persons. We only collect information that we consider to be appropriate.”
- Participant agrees that a client has a right to request entrance into the database as an anonymous client or a restricted client. Contact PHB for more information.
- Participant agrees that a completed Release of Information Form, or documented verbal consent, is required prior to any electronic information sharing. The ServicePoint ROI procedure must be transacted to document the client’s agreement to the Release of Information.
  - Clients who choose not to authorize sharing of information cannot be denied services for which they would otherwise be eligible.
  - All Client Authorization for ROI forms related to the CMIS/HMIS data sharing will be placed in a file to be located on premises.
  - CMIS/HMIS-related Authorization for ROI forms will be retained for a period of 7 years, after which time the forms will be discarded in a manner that ensures client confidentiality is not compromised.
The parties have caused this Addendum to be executed by their respective, duly authorized representatives.

ADOPTED AND AGREED:

PARTICIPANT

Washington County, Oregon
Department of Housing Services
111 NE Lincoln, Suite 200-L
Hillsboro, Oregon 97124

______________________________
Signature

______________________________
Printed Name

______________________________
Title

______________________________
Date (mm/dd/YYYY)

______________________________
Signature

______________________________
Printed Name

______________________________
Title

______________________________
Date (mm/dd/YYYY)
Attachment 1. Shared Data Elements

Part I. Shared Intake Data
The following data elements are collected at Community Connect intake and then shared with agencies participating in Community Connect:

A. Client Name: First, Middle, Last and Nickname (if applicable)
B. Client Social Security Number and Social Security Number Data Quality (i.e. full SSN, partial SSN, client does not know/have SSN, or client refused to provide SSN)
C. Client demographics: date of birth, date of birth type (i.e. actual date of birth, approximate date of birth, client does not know, or client refused to provide), race, ethnicity
D. Preferred language
E. Domestic violence victim status
F. Disability status and disability type
G. Veteran status
H. Homeless status (is client homeless, is client chronically homeless, housing status)
I. Residence prior to program entry and length of stay in that situation
J. Income and non-cash benefits
K. Household income percent of Federal Poverty Level (HHS) and Median Family Income (HUD)
L. Education level of adults
M. Health insurance status (yes/no)
N. Farmworker status
O. Entry/Exit history (date of enrollment and date of exit from Community Connect‐participating programs)
P. Attachments to client records
Q. Financial status, including employment, garnishment, debt
R. Criminal history (self‐reported by client)
S. Health summary, including pregnancy, chronic health conditions, hospitalizations, substance abuse
T. Household issues, including child services involvement, foster care
U. Assessment of Outcomes and Referrals, including assessment scores, determined level of need, referrals

Updates made to the client record by Community Connect participating agencies, other than the outcome of a referral and entry/exit history, are not shared by default (with the exception of HMIS participating agencies who have already established other data sharing agreements).
Community Connect Screening and Intake Flow Chart

SCREENING:

All callers all household types
First portion of assessment
Determine immediate need and eligibility

Street Outreach, 211, Winter shelters, etc
Street outreach workers have elected to assist clients in calling the screening line and support them through the documentation and placement process.

Meet one of the 4 HUD Homeless Categories

Does not meet HUD eligibility Criteria
Refer to other community resource: 211info, emergency rent, energy assistance, etc.

Immediate Need: Outside or Unsafe
Immediate Placement available

No Immediate Need: Schedule assessment with Housing Specialist Inform them what they will need to bring to document eligibility

No Immediate Placement Available

Family Shelter Network Safe Place Monika’s House/Women’s Crisis Line Winter Shelters
Complete Assessment within 48 hours of shelter entry

Determine placement
Document Homeless Status

Meet with Housing Specialist Complete Assessment
For Households in shelter who have completed an assessment with shelter, appropriate staff will work with Housing Specialist to determine housing placement and support household through the process of collecting documentation.

Placement Available: Receiving agency reviews assessment, completes intake

No Placement Available: Household informed that there is no placement available

Alternate Housing Plan? Refer to Case Management Program or other community resources as appropriate

Establish Oversight team to review returned referrals and “churning” households.

Homeless individuals who are in the midst of a mental health crisis (hospitalized, referred by crisis team, etc) will be screened for mental health services and assessed for housing services by the PATH outreach workers. Upon completion of the housing assessment in HMIS, the outreach worker will inform the Housing Specialist and placement determination will be made collaboratively.

Youth at Safe Place will be screened and assessed by Boys and Girls Aid staff for available youth specific programs including family reunification, foster care and adoption, as well as all other available services for which they might be eligible. Upon completion of the housing assessment in HMIS, the outreach worker will inform the Housing Specialist and placement determination will be made collaboratively.

Revised: 12/6/2013
Community Connect Initial Screening Form

Family Shelter Eligibility
☐ GNC ☐ CAO ☐ FP

Head of Household HMIS ID

HH Contact Info: Phone: - - / - - How did you hear about CC? Select

Email:

Where Did You Stay Last Night?

<table>
<thead>
<tr>
<th>Literally Homeless</th>
<th>Imminent Risk of Homelessness</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ In shelter: Exit Date: Select</td>
<td>☐ With a friend (14 days or less = eligible)</td>
</tr>
<tr>
<td>☐ In transitional housing: Exit Date: Select</td>
<td>How long can you stay: Select</td>
</tr>
<tr>
<td>☐ Camp, in a car or on the street **Immediate Placement</td>
<td>☐ With a family member</td>
</tr>
<tr>
<td>☐ Hotel/Motel paid by voucher or 3rd party **Immediate Placement</td>
<td>How long can you stay: Select (14 days or less = eligible)</td>
</tr>
<tr>
<td>☐ In a domestic violence situation **Immediate Placement</td>
<td>☐ In a hospital Select</td>
</tr>
<tr>
<td>If household is fleeing Domestic Violence refer to DV Crisis Line: (503)469-8620, 1(866)469-8600 Call to Safety (Previously known as Portland Women’s Crisis Line): 503-235-5333</td>
<td>☐ Jail/Prison/Juvenile Detention Select</td>
</tr>
<tr>
<td>Notes:</td>
<td>☐ Hotel/Motel paid by HH Select</td>
</tr>
<tr>
<td></td>
<td>☐ Foster Care or Group Home Select</td>
</tr>
<tr>
<td></td>
<td>☐ Substance Abuse Treatment Facility Select</td>
</tr>
<tr>
<td></td>
<td>☐ Detox Facility Select</td>
</tr>
<tr>
<td></td>
<td>☐ In my own housing: Select</td>
</tr>
<tr>
<td></td>
<td>Select</td>
</tr>
</tbody>
</table>

1. Is anybody in the Household a Veteran? NO
2. If YES, Do they have a VASH voucher or are they in the Grant and Per Diem Program? NO If yes, CLIENT IS ELIGIBLE
3. How long have you been staying there? Select
4. Was your situation caused by domestic violence? ☐ Yes ☐ No
If YES, household is eligible for Immediate Placement and a Housing Assessment.
5. What is your estimated total monthly income (before taxes or garnishments)?
AMI Level: ☐ 30% or below ☐ 31%-50% ☐ 51%-80% ☐ above 80% If at Imminent Risk, must be below 30% AMI to qualify for services

STOP! Does the household qualify for Community Connect? Their situation must fit into either the Literally Homeless or Imminent Risk Category; or be unsafe. If yes, continue with the form. Otherwise let them know they don’t qualify at this time and offer alternative resources if appropriate. Let the household know if their situation changes they can call back to be re-screened.

6. What was the City and zip code of your last permanent address(For HoH): City Zip Code:
7. Do you want to live in Washington County? ☐ Yes ☐ No

**If no and the household is not literally homeless, refer to 211 for resources in their community

<table>
<thead>
<tr>
<th>Family Members (Last, First, M.I.)</th>
<th>Relation ship</th>
<th>Sex</th>
<th>D.O.B.</th>
<th>S.S. #</th>
<th>Race* &amp; Ethnicity**</th>
<th>Primary Language</th>
<th>Disability Documented</th>
<th>Disability Type</th>
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</tbody>
</table>

*Race Key: N = American Indian/Alaska Native  P = Native Hawaiian/Pacific Islander  W = White  A = Asian  B = Black/African American

**Ethnicity Key: H = Hispanic / Latino  NON = Non Hispanic / Latino

Entered in to HMIS by: _________________ on: _________________ (date)

Doc rev. 8/03/2015
Community Connect Initial Screening Form

8. Are children enrolled in school, Head Start or Early Intervention? □ YES □ NO School District
   Your child(ren) may be eligible for supports from their school including help with transportation to their current school no matter where you are staying. ** Be sure to give them the name & # of their school advocate.

9. Is anyone in the household pregnant? □ Yes □ No If yes: Estimate Due Date: Select (+7 months pregnant eligible for family shelter)
   If household identifies HIV/AIDS refer to Cascade AIDS: (503)278-3834
   If any household member is a veteran refer to CRRC (503)808-1256 or 1-800-949-1004 Ext 51256 and DAVS (503)846-3060

In order to determine what programs and services you and your family may be eligible for, the information you have just provided will be entered into the County’s Homeless Management Information System. Your record will be updated as you receive services. All records are confidential and system is secure. Your information is only used to determine eligibility and for data tracking and statistical purposes. Do you agree to allow us to enter the information you have just provided into this system? □ Yes □ No

Schedule with Community Resource Advocate

Your household may be eligible for housing assistance through Washington County Programs. If you are interested in living in Washington County I can schedule a full assessment with a Community Resource Advocate to see if there are programs that you and your family might be eligible for and it will take about an hour. Please be aware that this appointment does not guarantee that you will receive assistance.

Would you like to meet with a Community Resource Advocate? □ Yes □ No
Please be on time. If you are late 15 minutes or more, you won’t be seen and will have to reschedule.

<table>
<thead>
<tr>
<th>Date of Scheduled Assessment: Select</th>
<th>Time:</th>
<th>Location: Select</th>
<th>Assessor: Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beaverton</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>5050 SW Griffith Dr., Suite 100 Beaverton, OR 97005</td>
<td></td>
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</tr>
<tr>
<td>Bus 54. Runs every 30 min. 1/3 mile from office.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Hillsboro</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1001 SW Baseline, Hillsboro, OR 97123</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Bus 57</td>
<td></td>
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</tr>
</tbody>
</table>

Needs Interpreter: No
Language: 

When you meet with the Community Resource Advocate, please bring the following items with you or have them available for your phone appointment:

- Identification for all adults in the household
- Social security cards for everyone in the household, including children
- Documentation of your income such as paystubs, DHS or unemployment benefits statements, etc.
- Documentation of your Disability
- Documentation of your living situation if available – See chart below to determine what is needed.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelter or Transitional Housing</td>
<td>Letter from provider verifying stay and expected exit date or contact info for provider</td>
</tr>
<tr>
<td>Camp, in a car or on the street</td>
<td>Will be gathered at assessment</td>
</tr>
<tr>
<td>Hotel/Motel paid by voucher or 3rd party</td>
<td>Letter from 3rd party or contact info of 3rd party</td>
</tr>
<tr>
<td>Hotel/Motel Paid by HH</td>
<td>Will be gathered at assessment</td>
</tr>
<tr>
<td>In a domestic violence situation</td>
<td>Will be gathered at assessment</td>
</tr>
<tr>
<td>Staying with Friend or family</td>
<td>Letter from friend or family member stating why you can’t stay and when you must be out or contact info for friend or family member</td>
</tr>
<tr>
<td>In a hospital</td>
<td>Contact information for hospital staff</td>
</tr>
<tr>
<td>Jail/Prison/Juvenile Detention facility</td>
<td>Discharge paperwork or Contact information for facility official</td>
</tr>
<tr>
<td>Foster Care or Group Home</td>
<td>Contact information for Case Worker</td>
</tr>
<tr>
<td>Substance Abuse Treatment Facility</td>
<td>Discharge paperwork or contact information for facility official</td>
</tr>
<tr>
<td>Detox Facility</td>
<td>Discharge paperwork or contact information for facility official</td>
</tr>
<tr>
<td>In my own housing</td>
<td>Eviction notice or letter from landlord or contact info for landlord</td>
</tr>
</tbody>
</table>

Family Shelter Network Wait List

Does your family want to be on the waiting list for the family shelters network? □ Yes □ No

10. Is everyone able to walk up and down stairs? □ Yes □ No
11. Anyone in HH restricted from having contact with Minors? □ Yes □ No
12. Convicted of a crime against another person? □ Yes □ No
   Name: Charge: Name: Charge:
13. Do you have a companion or service animal? □ Yes □ No

Immediate Placement Options:

Unaccompanied youth under 19 – refer to Safe Place (503) 542-2717
Families with Children – shelter network intake or winter shelters
Single Adults – Winter Shelters only

Entered in to HMIS by: _________________ on: _________________ (date)
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Check-in Dates: If on waitlist for family shelters, please check in every Monday

<table>
<thead>
<tr>
<th>Select</th>
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Referral Notes

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</table>

Applicant Signature_________________________               Date__________________________

Applicant Signature_________________________               Date__________________________

Staff Signature_________________________               Date__________________________

<table>
<thead>
<tr>
<th>Date</th>
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## WASHINGTON COUNTY SYSTEM ACCESS MATRIX

This Matrix was developed as a component of the Building Sustainable Partnerships for Housing project. A full report is available online at [http://www.co.washington.or.us/Housing/EndHomelessness/upload/BSPH-Grant_Washington-County-Report-on-Outcomes-and-Recommendations.pdf](http://www.co.washington.or.us/Housing/EndHomelessness/upload/BSPH-Grant_Washington-County-Report-on-Outcomes-and-Recommendations.pdf)

<table>
<thead>
<tr>
<th>SYSTEM</th>
<th>ACCESS POINT</th>
<th>SCREENING/ELIGIBILITY</th>
<th>REFERRAL/HOUSING PLACEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HIV/AIDS</strong></td>
<td><strong>Cascade AIDS Project</strong>&lt;br&gt;208 SW 5 Avenue, #800&lt;br&gt;Portland, OR, 97204&lt;br&gt;503-223-5907&lt;br&gt;<a href="http://cascadeaids.org/">http://cascadeaids.org/</a></td>
<td><strong>Walk-in to Office or Call Intake Staff to schedule appointment at 503-278-3834</strong>&lt;br&gt;<strong>Monday-Friday, 9am - 5pm</strong>&lt;br&gt;<strong>Group Intake at Service Center</strong></td>
<td><strong>If not HIV+, the assessment ends and client is referred to other community resources.</strong>&lt;br&gt;<strong>Must have HIV verification before housing and services provided.</strong></td>
</tr>
<tr>
<td><strong>Food Stamps (SNAP), TANF, and other State Mainstream Resources</strong></td>
<td><strong>Oregon Department of Human Services</strong>&lt;br&gt;155 N First Avenue&lt;br&gt;Hillsboro, OR, 97123&lt;br&gt;503-846-3150&lt;br&gt;<a href="http://www.oregon.gov/DHS/pages/index.aspx">http://www.oregon.gov/DHS/pages/index.aspx</a></td>
<td><strong>SNAP and TANF benefits based on income eligibility.</strong>&lt;br&gt;<strong>Other mainstream resources for people with disabilities include in-home services, community-based care, Medicaid/Medicare.</strong></td>
<td><strong>No established “Back Door” aligned with housing opportunities.</strong>&lt;br&gt;<strong>Refer to community housing, as necessary.</strong></td>
</tr>
<tr>
<td><strong>Developmental Disabilities</strong></td>
<td><strong>Washington County Department of Health and Human Services</strong>&lt;br&gt;155 N First Avenue&lt;br&gt;Hillsboro, OR, 97123&lt;br&gt;503-846-3150&lt;br&gt;<a href="http://www.co.washington.or.us/HHS/DevelopmentalDisabilities/">http://www.co.washington.or.us/HHS/DevelopmentalDisabilities/</a></td>
<td><strong>Call Washington County Developmental Disabilities Intake Line at 503-846-4737</strong>&lt;br&gt;<strong>After Hours Crisis Line 503-291-9111</strong></td>
<td><strong>Must meet eligibility criteria and reside in Washington County to access Developmental Disability Services.</strong></td>
</tr>
<tr>
<td><strong>Mental Health</strong></td>
<td><strong>Washington County Department of Health and Human Services</strong>&lt;br&gt;155 N First Avenue&lt;br&gt;Hillsboro, OR, 97123&lt;br&gt;503-846-4402&lt;br&gt;<a href="http://www.co.washington.or.us/HHS/MentalHealth/">http://www.co.washington.or.us/HHS/MentalHealth/</a></td>
<td><strong>Call Washington County Mental Health Access Line at 503-291-1155</strong>&lt;br&gt;<strong>Call FamilyCare Health Plans at 503-222-2880</strong></td>
<td><strong>Outpatient and Residential Treatment Services:</strong>&lt;br&gt;<strong>Outpatient: MH Provider Agency. Client needs OHP/Medicaid.</strong>&lt;br&gt;<strong>Residential: MH Provider Agency. Provider/hospital help client access SSI or OHP.</strong></td>
</tr>
<tr>
<td><strong>Substance and Gambling Addiction Treatment for Adults</strong></td>
<td><strong>Washington County Department of Health and Human Services</strong>&lt;br&gt;155 N First Avenue&lt;br&gt;Hillsboro, OR, 97123&lt;br&gt;503-846-4402&lt;br&gt;<a href="http://www.co.washington.or.us/HHS/Addiction/">www.co.washington.or.us/HHS/Addiction/</a></td>
<td><strong>Call Washington County at 503-846-2120</strong>&lt;br&gt;A list of Alcohol, Drug and Gambling Treatment Services Providers is available upon request</td>
<td><strong>Evaluation performed by a provider agency.</strong>&lt;br&gt;<strong>Cost based on sliding fee scale. Affordable Care Act may change cost 1/2014.</strong></td>
</tr>
<tr>
<td><strong>Aging and Disability Resource Connection of Oregon</strong></td>
<td><strong>Washington County Disability, Aging, and Veteran Services (DAYS)</strong>&lt;br&gt;180 E Main Street&lt;br&gt;Hillsboro, OR, 97123&lt;br&gt;503-846-3060&lt;br&gt;TTY: 711&lt;br&gt;<a href="mailto:davsinfo@co.washington.or.us">davsinfo@co.washington.or.us</a>&lt;br&gt;<a href="http://www.co.washington.or.us/HHS/DAYS/">www.co.washington.or.us/HHS/DAYS/</a></td>
<td><strong>Contact Aging and Disability Resource Connection (ADRC) at 1-855-673-2372</strong>&lt;br&gt;<a href="http://www.ADRCofOregon.org">www.ADRCofOregon.org</a></td>
<td>**Serving persons: <em>60+ years of age; <em>persons with physical disabilities ages 19 to 59 years</em></em></td>
</tr>
</tbody>
</table>

Prepared by Annette M. Evans, Homeless Program Coordinator<br>503-846-4760  [Annette_Evans@co.washington.or.us](mailto:Annette_Evans@co.washington.or.us)
### Client Information

#### Client - (1) Test, Justine A

<table>
<thead>
<tr>
<th>Summary</th>
<th>Client Profile</th>
<th>Households</th>
<th>ROI</th>
<th>Entry / Exit</th>
<th>Case Managers</th>
<th>Case Plans</th>
<th>Measurements</th>
<th>Assessments</th>
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<td>WashCo CCAS Screener name</td>
<td>Initial Screening Date</td>
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</table>

#### Assessment Tracking

1st Scheduled Assessment | Scheduled In-Person Assessment Complete
2nd Scheduled Assessment
3rd Scheduled Assessment
If more than 3 no-shows, how many?

Confirm no HH members are Attempting to Flee DV. If no DV safety issue then proceed.

Review Informed Consent policy with household

Review Entry/Exit History. Has HofH exited a Washington County homeless program in the last 2 years?

Yes

Has HofH ever been homeless before?

Yes

If yes, at what age?

Recidivism Screen Total | 10

Is this Client the Head-of-Household (tip: Veterans should always be HoH)?

Yes

If adult, does client have photo ID?

Yes

### HUD Universal Data Elements

| Relationship to Head of Household | Self (head of household) |
| Date of Birth | 01/02/1990 |
| Date of Birth Type | Full DOB Reported (HUD) |
| Gender | Other |
| If Other Gender, specify | |
| Race | American Indian or Alaska Native (HUD) |
| Race-Additional | White (HUD) |
| Ethnicity (Hispanic/Latino) | Non-Hispanic/Non-Latino (HUD) |
### Language
English

### Domestic violence victim/survivor
If yes for Domestic violence victim/survivor, when experience occurred

If yes for Domestic Violence Victim/Survivor, are you currently fleeing? No (HUD)

#### DV Screen Total

Does the client have a disabling condition?

<table>
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<th>Disabilities</th>
<th>HUD Verification</th>
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<td><strong>Disability Type</strong></td>
<td><strong>Start Date</strong></td>
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<tr>
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<td>Chronic Health Condition (HUD)</td>
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<tr>
<td>HIV/AIDS (HUD)</td>
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<tr>
<td>Physical (HUD)</td>
<td>01/07/2016</td>
</tr>
<tr>
<td>Developmental (HUD)</td>
<td>01/07/2016</td>
</tr>
</tbody>
</table>

### Developmental disability?
No

### HH connected to Mentor Oregon or FAB?
No

### U.S. Military Veteran? (Moved to Profile)
Yes (HUD)

If veteran- does client have copy of DD214?
Yes

### ONLY select other if NONE of the listed residence types apply

#### Residence Prior to Project Entry
Hotel or motel paid for without emergency shelter voucher (HUD)

#### If Other Type of Residence, specify

#### Is it safe for HH to stay there?
No

#### If no, is HH fleeing DV?
No

#### Length of Stay in Previous Place
One to three months (HUD)

### Client entering from the streets, ES or SH

If Yes for "Client entering from streets, ES or SH" Approximate date started: [Date Field]

Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today

Total number of months homeless on the street, in ES or SH in the past three years

Length of Time Homeless - Status Documented?
No

**Chronically Homeless = adult or unaccompanied youth w/ 1+ LT disability(s) and 1 yr of homelessness or 4 episodes of homelessness in past 3 yrs.**

### Is Client Chronically Homeless?
Yes

#### Housing Status Screen Total *
10

### Zip Code of Last Permanent Address
97404

### Income from Any Source
Data not collected (HUD)

#### Monthly Income

<table>
<thead>
<tr>
<th><strong>Start Date</strong></th>
<th><strong>Source of Income</strong></th>
<th><strong>Receiving Income Source?</strong></th>
<th><strong>Monthly Amount</strong></th>
<th><strong>End Date</strong></th>
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<td>10/01/2016</td>
<td>Earned Income (HUD)</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/12/2015</td>
<td>VA Service Connected Disability Compensation (HUD)</td>
<td>Yes</td>
<td>US$700.00</td>
<td></td>
</tr>
<tr>
<td>11/12/2015</td>
<td>VA Service Connected Disability Compensation (HUD)</td>
<td>No</td>
<td>US$0.01</td>
<td></td>
</tr>
</tbody>
</table>

**Non-Cash Benefits**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Source of Non-Cash Benefit</th>
<th>Receiving Benefit?</th>
<th>Amount of Non-Cash Benefit</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/19/2015</td>
<td>Temporary rental assistance (HUD)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/19/2015</td>
<td>Other TANF-Funded Services (HUD)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/19/2015</td>
<td>Other Source (HUD)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/19/2015</td>
<td>Section 8, Public Housing, or other ongoing rental assistance (HUD)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/19/2015</td>
<td>Special Supplemental Nutrition Program for WIC (HUD)</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Household Size**: 4

**Percent of Median Family Income**: 0-30% MFI

**Level of Family Income (% HHS Guidelines)**: Up to 50%

**Income Screen Total**: 8

**Highest Level of Education Attained**: Less Than High School

**All school age children enrolled in school?**: No

**Family requests contact from School Liaison**: No

**Housing Information**

- **Has moved 2 or more times in 60 days**: Yes
- **Has client ever been evicted?**: Yes
- **Has client ever been evicted from subsidized housing?**: No (HUD)
- **Number of Evictions in last 5 years**: 0
- **Does client owe money to any housing programs or previous landlords for back rent or damages?**: Yes (HUD)
- **Total $ amount of housing arrearage**: 1500
- **Total $ amount owed to LOCAL utility companies**: 500
- **Do you have or have you ever had a housing voucher?**: No

**If Yes, please describe**
Restrictions on where any HH member can live?
No

Housing Barriers score:

EMPLOYMENT & DEBT SUMMARY

WashCo 2Yr Employment History

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>HH Member</th>
<th>Position/Title/Business Type</th>
<th>Employer/Business Name</th>
<th>Hourly Wage</th>
<th>Primary Reason For Leaving Employment</th>
<th>Good Employment Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Employment-related services currently receiving: none
Services needed to maintain/secure employment: transportation

Employment Screen Total 15

Debt Amount 3000
Has client made payment plan(s) with creditors? No
Describe: medical debt

Financial Status Screen Total 3

Complete this section for all Household Members 18 years of age or older:

Does client have a criminal history? Yes (HUD)

Convicted Sex Offender?

Does the client owe court fees/fines? Yes (HUD)
If yes, how much? $3,000

Is client restricted from having social contact with minors? No

Convicted of arson, assault, drug distribution/manufacture or possession, property destruction or other person-to-person crime within past 7 years? Yes (HUD)

Criminal History - Past 7 Years

<table>
<thead>
<tr>
<th>HH member</th>
<th>Date of Conviction</th>
<th>* Felony?</th>
<th>Misdemeaner Charge</th>
<th>Time Served?</th>
<th>End of Sentence</th>
</tr>
</thead>
<tbody>
<tr>
<td>just</td>
<td>12/12/2013</td>
<td>No</td>
<td>Yes</td>
<td>discharge of fire arm</td>
<td>No</td>
</tr>
<tr>
<td>just</td>
<td>07/04/2012</td>
<td>Yes</td>
<td>possession</td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

Showing 1-2 of 2

Current legal system involvement:

On parole/probation? No
County (if applicable): Washington County
If not an Oregon county, list:
Open Cases/Outstanding Warrants No
Describe:
Do you have a recovery mentor through Community Corrections? Yes
May we talk with your mentor about your housing plan? Yes
If yes, Mentor Name: Mentor Phone 123-456-8888

Complete and upload release of information

Criminal History Screen Total 20

HEALTH SUMMARY
### Covered by Health Insurance

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Health Insurance Type</th>
<th>Covered?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/03/2015</td>
<td>State Health Insurance for Adults</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>Private Pay Health Insurance</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>Veteran's Administration (VA) Medical Services</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>State Children's Health Insurance Program</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>Health Insurance obtained through COBRA</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**HUD Verification**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Health Insurance Type</th>
<th>Covered?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/03/2015</td>
<td>State Health Insurance for Adults</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>Private Pay Health Insurance</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>Veteran's Administration (VA) Medical Services</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>State Children's Health Insurance Program</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12/03/2015</td>
<td>Health Insurance obtained through COBRA</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

*Showing 1-5 of 41*

**Pregnant?**

No

**Due date, if pregnant**


**Receiving Prenatal Medical Care?**

Yes

**Do you have any of the listed chronic health issues?**

Yes

**If HIV/AIDS, refer to CAP**

Hospitalized in the last 12 months for any of the above conditions?

Yes (HUD)

Serious or traumatic brain injury?

No (HUD)

# times in ER in the past 3 months:

2

# times admitted to hospital in past 12 months:

1

Treatment for mental health issues currently or in the past?

Yes (HUD)

Hospitalization for mental health reasons?

No (HUD)

Residential/In-patient treatment for substance abuse in last 2 years

Yes

### Substance Abuse

<table>
<thead>
<tr>
<th>HH Member</th>
<th>Sub Abuse Treatment or Recovery Plan</th>
<th>Substance Abuse Provider</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>just</td>
<td>Yes</td>
<td>just say no</td>
<td>10/15/2012</td>
<td></td>
</tr>
</tbody>
</table>

*Showing 1-1 of 1*

### Undocumented Diagnoses or Health Conditions

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Start Date</th>
<th>ConditionType</th>
<th>Condition</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Just</td>
<td>04/04/2014</td>
<td>Mental Health Diagnosis</td>
<td>depression</td>
<td></td>
</tr>
</tbody>
</table>

*Showing 1-1 of 1*

**Are you currently working with a counselor or case manager?**

No

### Current Health Treatment/Service Providers

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Agency/Provider/Hospital name</th>
<th>Physical Health/Mental Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/19/2013</td>
<td></td>
<td>Virginia Garcia</td>
<td>Physical Health</td>
</tr>
<tr>
<td>08/05/2011</td>
<td></td>
<td>White Bird</td>
<td>Physical Health</td>
</tr>
</tbody>
</table>

*Showing 1-2 of 2*
**Health Screen Total**  
14

**FOSTER CARE & CHILD WELFARE SUMMARY**

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is/has been in foster care system?</td>
<td>Yes</td>
</tr>
<tr>
<td>If yes, age at exit from foster care:</td>
<td>18</td>
</tr>
<tr>
<td>If was/is in foster care, select state</td>
<td>OR</td>
</tr>
<tr>
<td>Current Child Services involvement?</td>
<td>No</td>
</tr>
<tr>
<td>Child Protective Services worker name &amp; contact information:</td>
<td></td>
</tr>
<tr>
<td>Emergency Contact/Next-of-kin Information</td>
<td>Brother 750-111-2222</td>
</tr>
</tbody>
</table>

**VULNERABILITY INDEX (VI) SCORE**

<table>
<thead>
<tr>
<th>Comprehensive Screen Total</th>
<th>94</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need Level</td>
<td>High</td>
</tr>
<tr>
<td>Reasonable Accommodation signed</td>
<td>No</td>
</tr>
<tr>
<td>Homeless Verification on File</td>
<td>Verification from outreach worker (for on the street)</td>
</tr>
</tbody>
</table>

**WashCo Program Placement:**

<table>
<thead>
<tr>
<th>Referral accepted?</th>
<th>Pending</th>
</tr>
</thead>
</table>

**Receiving Agency Notes Re Assessment/Acceptance or Denial**

**Housing Placement**

**Date Client Secured Housing**

**Agency contact for follow-up**

**Assessor notes on referral to CWL(s)**

**Legal Clinic Eligibility**

- Have you been denied disability benefits for which you are eligible?
- Are you unable to work due to physical or emotional health issues?
- If yes, would you like assistance in filling out an application for disability?
- Have you been denied housing because of an arrest or conviction?
- Have you been denied employment or discouraged from seeking employment because of arrest/conviction?
- Do you have a low-level criminal record or misdemeanors?
- If you have debt that prevents you from obtaining housing, is it related to medical expenses?
- If you receive Social Security Disability or Income, do you have debt related to child support?
- Do you have debt that could be resolved through bankruptcy?
- Have you been denied food stamps or discouraged from applying for food stamps?
- Have you been denied medical services or government services due to lack of fixed address?
**Community Connect Comprehensive Assessment**

### Community Connect Assessor Contact Information

Name: ___________________________________________________________________________________________________

Agency: ___________________________________________________________________________________________________

Phone: _____________________________________________ Email: _________________________________________________

**HH Contact Info:** Phone: _____________________________ Email: _________________________________________________

Prior to completing assessment, please confirm that household is interested in remaining in Washington County

### Community Connect Assessment Date:

**Where Did You Stay Last Night?**

<table>
<thead>
<tr>
<th>Literally Homeless</th>
<th>Imminent Risk of Homelessness</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ In shelter: Exit Date:</td>
<td>☐ With a friend</td>
</tr>
<tr>
<td>☐ In transitional housing: Exit Date:</td>
<td>How long can you stay: ________ (14 days or less = eligible)</td>
</tr>
<tr>
<td>☐ Camp, in a car or on the street <strong>Immediate Placement</strong></td>
<td>☐ With a family member</td>
</tr>
<tr>
<td>☐ Hotel/Motel paid by voucher or 3rd party <strong>Immediate Placement</strong></td>
<td>How long can you stay: ________ (14 days or less = eligible)</td>
</tr>
</tbody>
</table>

If household is fleeing Domestic Violence refer to DV Crisis Line: (503)469-8620, 1(800)469-8600
Portland Women’s Crisis Line: 503-235-5333

☐ In a hospital
☐ Jail/Prison/Juvenile Detention
☐ Hotel/Motel paid by HH
☐ Foster Care or Group Home
☐ Substance Abuse Treatment Facility
☐ Detox Facility
☐ In my own housing – Rental Eviction notice? Yes No

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

**Housing Status Screen Total:**

<table>
<thead>
<tr>
<th>Family Members (Last, First, M.I.)</th>
<th>Relationship</th>
<th>Sex</th>
<th>D.O.B.</th>
<th>S.S. #</th>
<th>Race* &amp; Ethnicity**</th>
<th>Primary Language</th>
<th>Disability Documented</th>
<th>Disability Type</th>
<th>Armed Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>H.O.H.</td>
<td>M F</td>
<td></td>
<td></td>
<td></td>
<td>Y N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H.O.H.</td>
<td>M F</td>
<td></td>
<td></td>
<td></td>
<td>Y N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H.O.H.</td>
<td>M F</td>
<td></td>
<td></td>
<td></td>
<td>Y N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H.O.H.</td>
<td>M F</td>
<td></td>
<td></td>
<td></td>
<td>Y N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H.O.H.</td>
<td>M F</td>
<td></td>
<td></td>
<td></td>
<td>Y N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H.O.H.</td>
<td>M F</td>
<td></td>
<td></td>
<td></td>
<td>Y N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Community Connect Comprehensive Assessment

Community Connect Comprehensive Assessment

B = Black/African American

NON = Non Hispanic / Latino

9. If Developmental disability is YES. Is HH connected to Mentor Oregon or FAB (Full Access Brokerage)?

10. Review Entry/Exit History. Has any household member been enrolled in a Washington County homeless assistance program in the last 2 years?

11. Has any household member been homeless before?

12. If Yes, at what age?

Recidivism Screen Total:

13. Is this client the Head of Household? (Tip: Veterans should always be HoH)

14. If adult, does client have photo ID?

15. Is Head of Household a Domestic Violence victim/Survivor?

16. If yes, when did the last experience of domestic violence occurred?

17. If yes for Domestic Violence victim/survivor, are you currently fleeing?

DV Screen Total:

Income Sources

<table>
<thead>
<tr>
<th>Cash Benefits</th>
<th>$ Amount</th>
<th>Who?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplemental Security Income (SSI)</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Social Security Disability Income (SSDI)</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Social Security</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>General Public Assistance</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Temporary Aid to Needy Families (TANF)</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Veterans Benefits</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Employment Income</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Child Support</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Farm work (Nursery, etc.)</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>Unemployment Benefits</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
<tr>
<td>No Financial Resources- 0 income</td>
<td>□ Yes □ No</td>
<td>$</td>
</tr>
</tbody>
</table>

Non Cash Benefits

<table>
<thead>
<tr>
<th>Non Cash Benefits</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Children’s Health Insurance Program (SCHIP)</td>
<td>$</td>
</tr>
<tr>
<td>Veterans Health Care</td>
<td>$</td>
</tr>
<tr>
<td>Medicaid</td>
<td>$</td>
</tr>
<tr>
<td>Food Stamps</td>
<td>$</td>
</tr>
<tr>
<td>WIC</td>
<td>$</td>
</tr>
<tr>
<td>ERCD/ TANF Child Care</td>
<td>$</td>
</tr>
</tbody>
</table>

18. Total Household monthly Income

19. Garnishments

20. If YES, Type of Garnishment: Amount $  

21. Percent of Median Family Income (Refer to AMI chart)

22. Federal Poverty Level

Income Screen Total:
### Community Connect Comprehensive Assessment

**Highest level of Education attained by Adults:**

<table>
<thead>
<tr>
<th>Name</th>
<th>Grade Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 All school age children enrolled in school?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25 If YES, What is the name of the School/s?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26 Family Requests contact from School Liaison:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27 Has household moved 2 or more times in the past 60 days?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28 Has client ever been evicted?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29 Has client ever been evicted from subsidized housing?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 Number of Evictions in the last 5 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31 Does client owe money to any housing programs or previous landlords for back rent or damages?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32 Total amount of housing arrearage:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33 Total amount owed to Local utility companies:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34 Do you have or have you ever had a housing voucher?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35 If yes, Please describe:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36 Restrictions on where any HH member can live?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Housing Barriers Score:**

#### Employment & Debt History

**Employment History** – 2 YR Employment History

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>HH Member</th>
<th>Position/Title</th>
<th>Employer</th>
<th>Hourly Wage</th>
<th>Primary reason for leaving job</th>
<th>Good reference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

37 Employment-related services currently receiving:

38 Service needed to maintain/secure employment:

39 Are you unable to work due to physical or emotional health issues?     | Yes | No |
40 Have you been denied disability benefits for which you are eligible?   | Yes | No |
41 Would you like assistance in filling out an application for disability benefits? | Yes | No |

*If YES to questions 40 or 41, please refer client to ASSIST*

42 Referred to ASSIST | Yes | No |

**Employment Screen Total:**

<table>
<thead>
<tr>
<th>Question</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>43 Debt Amount</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>Describe:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>44 Has client made payment plans with creditors?</td>
<td>Describe:</td>
<td></td>
</tr>
</tbody>
</table>

**Financial Status Screen Total:**

---

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Community Connect Comprehensive Assessment

**Criminal History** – please complete this section for all HH members over 18

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>45. Does client have criminal history?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>46. Convicted sex offender?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>47. Does the client owe court fees/fines?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>48. If Yes, how much?</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>49. Is client restricted from having social contact with minors?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50. Convicted of arson, assault, drug distribution/manufacture or possession, property destruction or other person-to-person crime within past 7 years?</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

**Criminal History – Past 7 years**

<table>
<thead>
<tr>
<th>HH member</th>
<th>Date of conviction</th>
<th>Felony</th>
<th>Misdemeanor</th>
<th>Charge</th>
<th>Time served</th>
<th>End of Sentence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**Current Legal System Involvement**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>51. On parole/probation?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>52. County, State:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>53. Open Cases/Outstanding Warrants:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>54. Describe:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55. Do you have a recovery mentor through Washington County Community Corrections?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>56. May we talk with your mentor about your housing plan?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>57. If YES, Mentor Name:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Health Summary**

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>58. Health Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>59. Health Insurance Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>60. Pregnant?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>61. Do you have any of the listed chronic health issues:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kidney disease/End Stage Renal Disease or Dialysis; History of frostbite hypothermia or immersion foot; Liver disease, Cirrhosis, or End-stage Liver Disease; Heart disease, Arrhythmia or irregular heartbeat; HIV/AIDS; Emphysema; Diabetes; Asthma; Cancer; Hepatitis C; Tuberculosis; High blood pressure or hypertension, mental health issue <strong>If HIV/AIDS, Refer to CAP</strong></td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>62. Hospitalized in the last 12 months for any of the above conditions?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>63. Serious or traumatic brain injury?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>64. # of times in ER in past 3 months:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>65. # of times admitted to the hospital in the past 12 months:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Community Connect Comprehensive Assessment

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>66 Treatment for mental health issues currently or in the past?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>67 Hospitalization for mental health reasons?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>68 Residential in-patient treatment for substance abuse in last 2 years?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>69 Have you had outpatient treatment for substance abuse in the last 2 years?</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

#### Substance Abuse

<table>
<thead>
<tr>
<th>HH member</th>
<th>Sobriety Date</th>
<th>Treatment or Rec. Plan</th>
<th>Provider</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Undocumented Diagnoses or Health Conditions

<table>
<thead>
<tr>
<th>HH member</th>
<th>Start Date</th>
<th>Condition Type</th>
<th>Condition</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Behavior</td>
<td>Mental Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Physical</td>
<td>Medical</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HH member</th>
<th>Start Date</th>
<th>Condition Type</th>
<th>Condition</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Behavior</td>
<td>Mental Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Physical</td>
<td>Medical</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HH member</th>
<th>Start Date</th>
<th>Condition Type</th>
<th>Condition</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Behavior</td>
<td>Mental Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Physical</td>
<td>Medical</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HH member</th>
<th>Start Date</th>
<th>Condition Type</th>
<th>Condition</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Behavior</td>
<td>Mental Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Physical</td>
<td>Medical</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Are you currently working with a counselor or case manager to address your housing situation? | ☐ Yes ☐ No

**Organization:**

**Counselor/Case Manager Name:**

**Phone:**

### Current Health Treatment/Service Providers

<table>
<thead>
<tr>
<th>HH member</th>
<th>Start Date</th>
<th>Agency/Provider/Hospital Name</th>
<th>Physical or Mental Health</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Foster Care and Child Welfare Summary

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>71 Is/has been in foster care system?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>If Yes, age at exit from foster care: State:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>72 Current Child Welfare involvement?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>73 Child Protective Services worker name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Emergency Contact or next-of-kin information:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>74</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Comprehensive Screen Total:

<table>
<thead>
<tr>
<th>Eligibility for Legal Clinic Services</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>75 Have you been denied housing because of an arrest or conviction?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>76 Have you been denied employment or discouraged from seeking employment because of an arrest or conviction?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>77 Do you have a low-level criminal record that includes sidewalk obstruction, camping/trespass, park exclusion, or a misdemeanor conviction?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>78 If you have debt that prevents you from obtaining housing, is it related to medical expenses?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>79 If you receive Social Security Disability or Social Security Income, do you have debt that is related to child support?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>80 Do you have debt that could be resolved through bankruptcy?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>81 Have you been denied food stamps or discouraged from applying for food stamps?</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
Have you been denied medical services or been unable to receive government services because of the lack of a fixed address?

- Yes
- No

Referred to Legal Clinic

- Yes
- No

Community Connect Documents Check list

Required Forms (Community Connect Packet)

- 1. Homeless Verification and Self-Declaration of Housing Status form (Appendix 10.7)
- 2. Resource Eligibility and Housing Option form (Appendix 10.6)
- 3. Self-Declaration of Income form

Documents required from client:

- 4. ID’s for all adults in the household
- 5. Social Security Cards for all members in the household
- 6. Birth Certificates for all children under 18
HOMELESS VERIFICATION AND SELF-DECLARATION OF HOUSING STATUS (1 of 3)

Applicant Name: ________________________________

HMIS Client I.D. #: __________________________ (To be completed by Community Connect staff)

☐ Household without dependent children (complete one form for each adult in the household)
☐ Household with dependent children (complete one form for household)

Number of persons in the household: __________

This is to certify that the above named individual or household is currently homeless or at-risk of homelessness, based on the following information and the signed declaration by the applicant.

Check only one:

☐ I [and my children] am/are currently homeless and living in shelter, transitional housing, or places not meant for human habitation (e.g. street, car, abandoned building), and no subsequent residence has been identified, and the household lacks the resources or support networks needed to obtain other permanent housing. [HUD Category 1]

1) Last night the applicant slept at/in ____________________________ and tonight will sleep at/in ____________________________

2) How long has the applicant been living in the situation indicated in question 1? ___ Days ___ Months ___ Years

3) Does the applicant have a disabling condition documented by a physician OR by the Social Security Administration? ................................................................. ☐ Yes ☐ No ☐ Don’t Know

4) Has the applicant been continually homeless (on the streets, residing in a place not meant for habitation, or residing in an emergency shelter) for 12+ months? ......................... ☐ Yes ☐ No ☐ Don’t Know

Homeless period of 12+ consecutive months is: Month/Day/Year ___/___/____ TO Month/Day/Year ___/___/____

5) Has the applicant experienced four (4) or more episodes of homelessness in the past three years that equal 12 months or more, and each break separating the occasions is at least 7 consecutive nights not living homeless? ☐ Yes ☐ No ☐ Don’t Know

#1: M/D/Year ___/___/____ TO M/D/Year ___/___/____ #5: M/D/Year ___/___/____ TO M/D/Year ___/___/____
#2: M/D/Year ___/___/____ TO M/D/Year ___/___/____ #6: M/D/Year ___/___/____ TO M/D/Year ___/___/____
#3: M/D/Year ___/___/____ TO M/D/Year ___/___/____ #7: M/D/Year ___/___/____ TO M/D/Year ___/___/____
#4: M/D/Year ___/___/____ TO M/D/Year ___/___/____ #8: M/D/Year ___/___/____ TO M/D/Year ___/___/____

6) Is the applicant a U. S. Military Veteran? ................................................................. ☐ Yes ☐ No ☐ Don’t Know

7) What is the zip code of the applicant’s most recent permanent address? ......................... ____________________________ ☐ Don’t Know

☐ I [and my children] am/are at imminent risk of being evicted from the housing we are presently staying in and must leave this housing within the next ___ days, and no subsequent residence has been identified, and the household lacks the resources or support networks needed to obtain other permanent housing. [HUD Category 2]

☐ I [and my children] am/are the victim(s) of domestic violence and am/are fleeing from abuse. [HUD Category 4]

I certify that the information above and any other information I have provided in applying for assistance is true, accurate and complete. The homeless verification comes in the form of third-party documentation, in most cases, and to the best of my ability I will provide the name and/or agency that can provide third party verification on my behalf.

Applicant Signature: ________________________________ Date: ________________________________

Staff Certification

I understand that third-party verification is the preferred method of certifying homelessness or risk for homelessness for an individual who is applying for assistance. I understand self-declaration is only permitted when I have attempted to but cannot obtain third party verification.

Documentation of attempt made for third-party verification: ________________________________

Community Connect Staff Signature: ________________________________ Date: ________________________________

Phone: ________________________________ Email: ________________________________

Homeless Verification and Self Declaration is valid for 90 days from the Staff Certification date listed above.
Checklist to certify Homeless Verification and Housing Status includes:

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>Required verification (Order of Priority):</th>
</tr>
</thead>
</table>
| CATEGORY 1 | 1) Written third party documentation providing verification of homelessness by the outreach worker and/or documentation of records contained in an HMIS, or comparable database used by victim service providers, with auditable history of all entries; OR  
2) Written referral by another shelter, safe haven or service provider; OR  
3) Self-Declaration of Housing Status certified by the individual or head of household seeking assistance stating that (s)he is living on the streets.  
Chronic Homeless requires additional evidence of disability:  
4) Written verification of the disability from a professional licensed by the state; OR  
5) Written verification from the Social Security Administration; OR  
6) Receipt of a disability check; OR  
7) Intake staff-recorded observation of disability that, no later than 45 days from the application for assistance, is confirmed and accompanied by evidence in (4), (5), or (6). |
|  | 1) Letter from institution stating the person's length of stay, AND  
2) Letter from service provider stating that prior to admission to the institution the person was living in the streets or at an emergency shelter and the specific institution setting in which the applicant resided. |
|  | Letter from the shelter organization/transitional housing facility/hotel stating that the person is:  
1) Currently residing in temporary housing, AND  
2) (If in transitional housing) was living in the streets or emergency shelter when they were admitted to the transitional/supportive housing. |
| CATEGORY 2 | Required verification: |
|  | 1) A court order resulting from an eviction action notifying the individual or family that they must leave; OR  
2) For individual and families leaving a hotel or motel-evidence they lack the financial resources to stay; OR  
3) A documented and verified oral statement; AND  
Certification that no subsequent residence has been identified; AND  
Self-certification or other written documentation that the individual lack the financial resources and support necessary to obtain permanent housing. |
| CATEGORY 4 | Required verification: |
|  | For non-victim service providers:  
Oral statement by the individual or head of household seeking assistance that they are fleeing. This statement is documented by a Self-Declaration certified by the applicant or a certification by the caseworker.  
1) Where the safety of the individual or family is not jeopardized, the oral statement must be verified; AND  
2) Certification by the individual or head of household that no subsequent residence has been identified; AND  
3) Self-Declaration of Housing Status that the individual or family lacks the financial resources to obtain other permanent housing. |

| CATEGORY 4 | Required verification: |
|  | For non-victim service providers:  
Oral statement by the individual or head of household seeking assistance that they are fleeing. This statement is documented by a Self-Declaration certified by the applicant or a certification by the caseworker.  
1) Where the safety of the individual or family is not jeopardized, the oral statement must be verified; AND  
2) Certification by the individual or head of household that no subsequent residence has been identified; AND  
3) Self-Declaration of Housing Status that the individual or family lacks the financial resources to obtain other permanent housing. |
RESOURCE ELIGIBILITY AND HOUSING OPTIONS (2 of 3)

Applicant Name: ____________________________________________
HMIS Client I.D. #: __________________ (To be completed by Community Connect staff)

Please assess with the applicant what appropriate subsequent options might be available to the household:

Subsequent Housing Options:
1. Are there any appropriate subsequent housing options for this household? □ Yes □ No
   If yes, please note below:

2. Have you verified that no other appropriate subsequent housing options are available? □ Yes □ No

Financial Resources and Support Networks:
3. Are there any financial resources or support networks available to this household that can be
   used to help them remain in their current housing or to obtain appropriate subsequent housing? □ Yes □ No
   If yes, please note below:

4. Does anyone in the household have a checking or savings account? □ Yes □ No
   If yes, please note account balances below:
   Checking $ ___________________ Savings $ ___________________

5. Have you verified that the household lacks the financial resources and support networks to
   maintain housing or obtain new housing? □ Yes □ No

Please document below (check all that apply):

☐ Applicant’s income is insufficient to obtain and/or maintain housing (see attached income verification).
   Applicant is at _____% AMI.
☐ Applicant has no friends or family in the area.
☐ Applicant has no friends or family with housing that can support them space wise.
☐ Applicant has no friends or family that is allowed to house them due to lease restrictions.
☐ Friends and family lack the financial resources to support the applicant.
☐ Friends and family refuse to provide assistance.
☐ The applicant does not qualify for housing assistance through other agencies at this time.

☐ Community Connect Staff Signature: ____________________________ Date: ________________

By signing this form, I declare that all of the Subsequent Housing, Financial Resource and Support Networks
information provided in this document is true and correct to the best of my knowledge.
I understand that by providing fraudulent information, I could be prosecuted to the fullest extent of the law.

☐ Applicant Signature ____________________________ Date ____________________

Resource Eligibility and Housing Options Documentation is valid for 60 days from the Staff Certification date listed above.

Community Connect of Washington County, Oregon  www.co.washington.or.us/homeless
[3/30/2015]
SELF-DECLARATION OF INCOME (3 of 3)

Applicant Name: ________________________________
HMIS Client I.D. #: ____________________ (To be completed by Community Connect staff)

This is to certify the income status for the above named individual. Income includes but is not limited to:
• The full amount of gross income earned before taxes and deductions.
• The net income earned from the operation of a business, i.e., total revenue minus business operating expenses. This also includes any withdrawals of cash from the business or profession for your personal use.
• Monthly interest and dividend income credited to an applicant's bank account and available for use.
• The monthly payment amount received from Social Security, annuities, retirement funds, pensions, disability and other similar types of periodic payments.
• Any monthly payments in lieu of earnings, such as unemployment, disability compensation, SSI, SSDI, and worker's compensation.
• Monthly income from government agencies excluding amounts designated for shelter, and utilities, WIC, food stamps, and childcare.
• Alimony, child support and foster care payments received from organizations or from persons not residing in the dwelling.
• All basic pay, special day and allowances of a member of the Armed Forces excluding special pay for exposure to hostile fire.

Check only one box and complete only that section

Income:
☐ I certify, under penalty of perjury, that I currently receive the following income:

Source: ___________________________________________ Amount: ___________ Frequency: ___________
Source: ___________________________________________ Amount: ___________ Frequency: ___________
Source: ___________________________________________ Amount: ___________ Frequency: ___________

☐ Applicant Signature: ________________________________ Date: ______________________

No Income:
☐ I certify, under penalty of perjury, that I do not have any income from any source at this time.

☐ Applicant Signature: ________________________________ Date: ______________________

Staff Verification
I understand that third-party verification is the preferred method of certifying income for assistance. I understand self declaration is only permitted when I have attempted to but cannot obtain third party verification.

Documentation of attempt made for third-party verification:
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

☐ Community Connect Staff Signature: ________________________________ Date: ________________
STAFF AFFIDAVIT FOR ACCOMMODATION

Applicant Name: ________________________________

The homeless applicant named below has been assessed for housing placement by Community Connect. The applicant assessment score and the recommended scoring range for program referrals based on specific housing/service needs are not in the best interest of the applicant for the reason stated below. After consultation with the following program agency, it has been agreed to grant a reasonable accommodation to this applicant for placement in the following program based on:

a) The applicant is eligible for the program; and
b) The program is more appropriate to meet the applicant needs; and

c) The assessment score does not accurately capture the housing and/or service needs of the applicant based on:

Applicant Assessment Score: ______ points

Proposed Program Eligibility Score: ______ points

Reason for accommodation: _____________________________________________________________

Refer to: ___________________________________________ _______________________________

Program Contact Agency

Phone/Email Contact Information

This Affidavit certifies that true and complete information was used to determine eligibility, and certifies that no conflict of interest exists related to the provision of assistance, and that it is in the best interest of the applicant to be referred to the above referenced program.

Each person signing below certifies that the applicant named above meets all requirements to receive assistance and that all of the information provided above is true and complete, to the best of my knowledge. This Affidavit certifies that the provision of assistance to the applicant named above has not resulted, nor will result, in a personal or financial interest or benefit, either for myself or for anyone with whom I have family or business ties.

Community Connect Staff Signature: _______________________________ Date: _____________

______________________________
Print Name

Phone: ___________________ Email: ________________________________

Community Connect Supervisor Signature: __________________________ Date: _____________

______________________________
Print Name
Community Connect Assessment Scoring Guide

**Recidivism – Max= 10**

<table>
<thead>
<tr>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of Washington County CoC or other Washington County homeless program entry in last 2 years</td>
<td>5 pts</td>
</tr>
<tr>
<td>Previously Homeless</td>
<td>5 pts</td>
</tr>
</tbody>
</table>

**Domestic Violence History – Max 10**

<table>
<thead>
<tr>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last incident within last 6 months</td>
<td>10 pts</td>
</tr>
<tr>
<td>Last incident 6-12 months</td>
<td>5 pts</td>
</tr>
</tbody>
</table>

**Housing Status – Max= 10**

<table>
<thead>
<tr>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literally homeless</td>
<td>5 pts</td>
</tr>
<tr>
<td>Chronically homeless</td>
<td>10 pts</td>
</tr>
</tbody>
</table>

**Income – Max= 10**

<table>
<thead>
<tr>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 income</td>
<td>10 pts</td>
</tr>
<tr>
<td>Below 30% AMI</td>
<td>8 pts</td>
</tr>
<tr>
<td>Above 30%</td>
<td>0 pts</td>
</tr>
</tbody>
</table>

**Housing History – Max= 12+ (base points on Worst History)**

<table>
<thead>
<tr>
<th>Description</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moved 2 or more times in last 60 days</td>
<td>5 pts</td>
</tr>
<tr>
<td>Evictions in the last 3 years</td>
<td>1 pt.</td>
</tr>
<tr>
<td>Owe $ to previous Landlord/arrears</td>
<td></td>
</tr>
<tr>
<td>0-$1,000</td>
<td>0 Pts</td>
</tr>
<tr>
<td>More than $1,000</td>
<td>5 pts</td>
</tr>
<tr>
<td>Owe Utility</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>2 pts</td>
</tr>
<tr>
<td>No</td>
<td>0 Pts</td>
</tr>
<tr>
<td>Evicted from federally funded/public housing</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>5 pts</td>
</tr>
<tr>
<td>No</td>
<td>0 Pts</td>
</tr>
</tbody>
</table>
## Community Connect Assessment Scoring Guide

### Employment – Max=15 (base points on best history)

<table>
<thead>
<tr>
<th>Employment</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployed</td>
<td>5 pts</td>
</tr>
<tr>
<td>No employment &amp; not in school</td>
<td></td>
</tr>
<tr>
<td>In past <strong>2 years</strong></td>
<td>10 pts</td>
</tr>
<tr>
<td>In the last <strong>year</strong></td>
<td>5 pts</td>
</tr>
<tr>
<td>In the last <strong>6 months</strong></td>
<td>2 pts</td>
</tr>
<tr>
<td>Unsteady employment/multiple jobs in last year</td>
<td>2 pts</td>
</tr>
<tr>
<td>Regular/Steady employment over past <strong>2 years</strong></td>
<td>0 pts</td>
</tr>
</tbody>
</table>

### Financial Status – Max=10 (base points on worst history)

<table>
<thead>
<tr>
<th>Financial Status</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debt</td>
<td></td>
</tr>
<tr>
<td>More than $10,000</td>
<td>10 pts</td>
</tr>
<tr>
<td>5-10K</td>
<td>7 pts</td>
</tr>
<tr>
<td>1-5k</td>
<td>3 pts</td>
</tr>
<tr>
<td>Less than 1K</td>
<td>0 pts</td>
</tr>
<tr>
<td>Currently making payments/Payment plan in place</td>
<td><strong>-3 pts</strong></td>
</tr>
</tbody>
</table>

### Criminal History – Max=36 (base points on worst history)

<table>
<thead>
<tr>
<th>Criminal History</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convicted Sex Offender</td>
<td>10 pts</td>
</tr>
<tr>
<td>Restricted from having contact with minors</td>
<td>5 pts</td>
</tr>
<tr>
<td>Conviction on list in 7 years</td>
<td>5 pts</td>
</tr>
<tr>
<td>Felony/Misdemeanor</td>
<td></td>
</tr>
<tr>
<td>Felony conviction in the last <strong>2 years</strong></td>
<td><strong>OR</strong> 10 pts</td>
</tr>
<tr>
<td>Misdemeanor conviction in the last <strong>2 years</strong></td>
<td><strong>OR</strong> 5 pts</td>
</tr>
<tr>
<td>Felony over 2 years</td>
<td><strong>OR</strong> 5 pts</td>
</tr>
<tr>
<td>Misdemeanor over 2 years</td>
<td><strong>OR</strong> 3 pts</td>
</tr>
<tr>
<td>Currently on Parole/probation</td>
<td>Yes</td>
</tr>
<tr>
<td>Current open case or warrant</td>
<td>Yes</td>
</tr>
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</table>
**Community Connect Assessment Scoring Guide**

### Health Summary = 40+

<table>
<thead>
<tr>
<th>Health Insurance</th>
<th>Yes</th>
<th>0 pts</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td></td>
<td>5 pts</td>
</tr>
</tbody>
</table>

**Number of Chronic Health Issues:** How many of the following chronic Health Issues has the client been diagnosed and/or been treated for any of the following: Kidney disease/End Stage Renal Disease or Dialysis; History of frostbite, hypothermia or immersion foot; Liver disease, Cirrhosis, or End-stage Liver Disease; Heart disease, Arrhythmia or irregular heartbeat; HIV/AIDS; Emphysema; Diabetes; Asthma; Cancer; Hepatitis C; Tuberculosis; High blood pressure or hypertension, mental health issue

| Yes | 5 pts |

**Serious or traumatic brain injury**

| Yes | 5 pts |

**Hospitalized in the last 12 months for any of the above conditions**

| Yes | 5 pts |

**# of times in ER in past 3 months**

| 1 pt each |

**# of times admitted to the hospital in past 12 months**

| 2 pts each |

**Hospitalization for mental health reasons in last year**

| Yes | 10 pts |

**Inpatient treatment for substance Abuse/Detox**

| Less than 1 year | 10 pts |
| 1-2 years | 5 pts |
| Longer than 2 yrs ago | 0 pts |

**Max total** | 143
Immediate Placement Regardless of Points: Literally Homeless
DVRC/Monica’s House
Family Shelter Network
Safe Place Youth – Boys And Girls Aid
Severe Weather Shelters

Housing Placement Options based on Score
Below 35 pts = low barrier

Transitional Housing:
Transitional Living Program – Boys And Girls Aid

Rapid Rehousing/Prevention:
Emergency Solution Grant (ESG)
Community Action Rent Assistance
Support Services for Veteran Families (SSVF)
Prevention Assistance – Cascade AIDS Project

Permanent Housing:
Affordable Housing Project-based Section 8 Wait List

35-75= moderate

Transitional Housing:
Fresh Start Recovery
Jubilee Transition Homes
Fredrick House
Salvation Army Veterans & Family Center
Homeless to Work
Washington County Transitional Housing Program

Rapid Rehousing/Prevention with Case Management:
Emergency Solutions Grant (ESG)
CoC Rapid Re-Housing for Families
Housing Stabilization Program – Good Neighbor Center
Support Services for Veteran Families (SSVF)
Rent Assistance – Cascade AIDS Project
CAO Support Services

Permanent Housing:
Affordable Housing Project-based Section 8 Wait List

75+=high

Permanent Supportive Housing:
Legacy Shelter Plus Care – Service Providers include: Cascade AIDS Project; Community Action;
Housing Independence; LifeWorks NW; Luke-Dorf, Inc.; Open Door Counseling Center; and Sequoia Mental Health Services, Inc.

The Knoll (Veterans)
HUD –VASH
Tom Brewer
Safe Haven
Hillsboro GILP /Hartner House
TriHaven
## Community Connect - Occupied Beds Summary

**11/17/15**

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### Emergency Shelter

<table>
<thead>
<tr>
<th>Entry Exit Provider Id</th>
<th>Max HH (worksheet)</th>
<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
</tr>
</thead>
<tbody>
<tr>
<td>BGA - Safe Place Youth Shelter (ESG)(2533)</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>CAO - Family Shelter - ESG(2385)</td>
<td>5</td>
<td>5</td>
<td>20</td>
<td>14</td>
</tr>
<tr>
<td>Family Promise - SP - ESG(2280)</td>
<td>3</td>
<td>3</td>
<td>14</td>
<td>10</td>
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<tr>
<td>Good Neighbor Center (GNC) (OHCS ESG)(2285)</td>
<td>9</td>
<td>9</td>
<td>36</td>
<td>39</td>
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### Homelessness Prevention (HUD)

<table>
<thead>
<tr>
<th>Entry Exit Provider Id</th>
<th>Max HH (worksheet)</th>
<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
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<tbody>
<tr>
<td>CAO - OCD-ESG Prevention(3950)</td>
<td>10</td>
<td>19</td>
<td>25</td>
<td>47</td>
</tr>
<tr>
<td>CAO - OHCS-ESGP Prevention(3948)</td>
<td>2</td>
<td>2</td>
<td>3</td>
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</table>

### PH - Housing only (HUD)

<table>
<thead>
<tr>
<th>Entry Exit Provider Id</th>
<th>Max HH (worksheet)</th>
<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
</tr>
</thead>
<tbody>
<tr>
<td>WashCo - The Knoll(3210)</td>
<td>12</td>
<td>12</td>
<td>12</td>
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<tr>
<td>WashCo - VASH - SP(3035)</td>
<td>87</td>
<td>70</td>
<td>108</td>
<td>104</td>
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</table>

### Permanent Supportive Housing

<table>
<thead>
<tr>
<th>Entry Exit Provider Id</th>
<th>Max HH (worksheet)</th>
<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
</tr>
</thead>
<tbody>
<tr>
<td>LifeWorks NW - Tom Brewer Recovery House(2816)</td>
<td>18</td>
<td>15</td>
<td>18</td>
<td>16</td>
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<tr>
<td>Luke-Dorf Graduated Independent Living (HILP) (2651)</td>
<td>14</td>
<td>8</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>Sequoia MH - Tri-Haven(2513)</td>
<td>12</td>
<td>15</td>
<td>12</td>
<td>15</td>
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<tr>
<td>WashCo-SPC-CH0140C(3324)</td>
<td>3</td>
<td>4</td>
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<tr>
<td>WashCo-SPC-ch0152c(3988)</td>
<td>3</td>
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<tr>
<td>WashCo-SPC-OR0095L(2928)</td>
<td>160</td>
<td>155</td>
<td>230</td>
<td>224</td>
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<td>WashCo-SPC-OR0155L (CH706001)(2802)</td>
<td>22</td>
<td>28</td>
<td>22</td>
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### Rapid Re-Housing

<table>
<thead>
<tr>
<th>Entry Exit Provider Id</th>
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<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
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<tbody>
<tr>
<td>CAO - CoC RRH Families(4726)</td>
<td>30</td>
<td>28</td>
<td>75</td>
<td>84</td>
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<tr>
<td>CAO - OCD-ESG Rehousing(3949)</td>
<td>1</td>
<td>11</td>
<td>6</td>
<td>34</td>
</tr>
<tr>
<td>CAO - OHCS-ESGP Rehousing(3942)</td>
<td>9</td>
<td>3</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>CAO - Rent Assistance Program(2384)</td>
<td>18</td>
<td>79</td>
<td>50</td>
<td>183</td>
</tr>
<tr>
<td>CAO - SSVF Rehousing(3928)</td>
<td>20</td>
<td>29</td>
<td>36</td>
<td>49</td>
</tr>
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</table>
## Community Connect - Occupied Beds Summary

### 11/17/15

<table>
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<th>Entry Exit Provider Id</th>
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<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
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<tbody>
<tr>
<td>GNC - Housing Stabilization Program(2402)</td>
<td>12</td>
<td>8</td>
<td>24</td>
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<tr>
<td>Lutheran Community Services NW - HopeSpring Program (OHCS ESG 2012)(2294)</td>
<td>15</td>
<td>3</td>
<td>36</td>
<td>9</td>
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### Safe Haven

<table>
<thead>
<tr>
<th>Entry Exit Provider Id</th>
<th>Max HH (worksheet)</th>
<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
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<tbody>
<tr>
<td>Luke-Dorf - Safe Haven(2530)</td>
<td>10</td>
<td>6</td>
<td>10</td>
<td>6</td>
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### Transitional Housing

<table>
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<tr>
<th>Entry Exit Provider Id</th>
<th>Max HH (worksheet)</th>
<th>Households</th>
<th>Max Persons (worksheet)</th>
<th>Persons</th>
</tr>
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<tbody>
<tr>
<td>BGA - Transitional Living Program(2534)</td>
<td>11</td>
<td>9</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>Homeless to Work (HtW) (Wash Co)(2837)</td>
<td>13</td>
<td>11</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>Salvation Army Veterans and Family Center - SP (4101)</td>
<td>59</td>
<td>51</td>
<td>70</td>
<td>76</td>
</tr>
<tr>
<td>Washington County Transitional Corrections Housing Program(2401)</td>
<td>3</td>
<td>3</td>
<td>9</td>
<td>16</td>
</tr>
</tbody>
</table>

### Prompt Information

<table>
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<tr>
<th>Report:</th>
<th>WashCo - Community Connect - Occupied Beds Summary v04</th>
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<tbody>
<tr>
<td>Report effective:</td>
<td>Nov 17, 2015 3:11:28 AM</td>
</tr>
<tr>
<td>Provider Group:</td>
<td>WashCo Community Connect(733)</td>
</tr>
</tbody>
</table>
# Community Connect

## PROGRAM INFORMATION FOR CLIENTS

Click on the PDF icon to review information on the program. This information is available for printing and sharing with the participant being referred to the Provider Agency below.

---

Not for Release – All Information Below is Internal to Community Connect

## PROGRAM REFERRAL CONTACT INFORMATION

<table>
<thead>
<tr>
<th>PROJECT NAME:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AGENCY NAME:</td>
<td></td>
</tr>
<tr>
<td>AGENCY STREET ADDRESS:</td>
<td></td>
</tr>
<tr>
<td>AGENCY CITY, STATE ZIP</td>
<td></td>
</tr>
</tbody>
</table>

| CONTACT NAME: |  |
| PHONE & EMAIL INFORMATION: |  |
| OFFICE HOURS/DAYS: |  |

| ALTERNATE CONTACT: |  |
| PHONE & EMAIL INFORMATION: |  |
| OFFICE HOURS/DAYS: |  |

| PROGRAM DESCRIPTION: |  |
| Examples of items to include: |  |
| Type of housing, target population (chronic, family, youth, etc.), target subpopulation (men only, women only, veteran, fleeing domestic violence), target age (youth ages, seniors 55+) |  |

| SPECIAL ELIGIBILITY REQUIREMENTS: |  |
| Examples of items to include: |  |
| Required of diagnosed disabling condition, diagnosis of mental health, must meet SPMI, required clean and sober 6+ months, etc. |  |

| HOMELESS REQUIREMENTS: |  |
| HUD homeless definition: |  |
| Category 1 “Literally Homeless” on the street or in shelter. |  |
| Category 2. “Imminent Risk of Homelessness” within 14 days. |  |
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I. Program Summary

The Emergency Solutions Grant (ESG) provides federal funds to assist individuals and families to quickly regain stability in permanent housing after experiencing a housing crisis or homelessness. ESG funds are available for five program components: street outreach, emergency shelter, homelessness prevention, rapid re-housing assistance, and data collection through the Homeless Management Information System; as well as administrative activities. The ESG program is authorized by subtitle B of title IV of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11371 – 11378).

In PY 2017, Washington County received $164,525 in Emergency Solutions Grant (ESG) funds. In coordination with the activities of the County’s Continuum of Care – The Housing and Supportive Services Network (HSSN), OCD administers the ESG program. After consulting with the HSSN, it was decided that $25,000 would be used for street outreach, $50,000 for shelter operations, $30,874 for homeless prevention assistance, $46,312 for rapid re-housing assistance, and the total for administration would be $12,339, representing 7.5 percent of the total FY 2107 ESG allocation.

A. Program Standards

Subgrantees are required to comply with the following minimum program standards as outlined in 24 CFR Part 576.

1. Evaluating Eligibility for Assistance/Coordinated Entry

The Washington County Emergency Solutions Grant (ESG) Program participates in and complies with the Housing and Supportive Services Network (HSSN) coordinated entry process, commonly known as Community Connect. Community Connect utilizes standard assessment tools and protocols approved by the HSSN. Specific protocols to address the specific health and safety concerns for youth, those fleeing domestic violence or those who are in the midst of a mental health crisis have been established.

The eligibility process includes an initial phone or in person screening to determine whether or not the applicant meets one of HUD’s categorical definitions of homeless or at risk of homelessness. If yes, then a more comprehensive assessment is completed in person either by Community Connect staff or approved outreach staff to verify applicants’ homeless status and determine which ESG service components they qualify for and that will address their housing need. Eligibility determinations must be documented in client files and preferably through third-party documentation. Intake worker observation or participant self-certification can be used when due diligence by staff and client is documented in the file indicating third-party verification is unavailable.

Re-evaluations of eligibility for continued receipt of homelessness prevention and rapid re-housing assistance are required—every three (3) months for prevention and annually for rapid re-housing. Minimally, each re-evaluation of eligibility must verify that the client household
does not have an annual income that exceeds thirty (30) percent of HUD determined median family income for the service area and the household continues to lack sufficient resources and support networks needed to retain housing without ESG assistance. If a program participant informs the subgrantee of a change in income there is no immediate effect on the program participant’s eligibility and assistance can continue at the discretion of the subgrantee until the next required re-evaluation. There is no HUD or OCD requirement that the client notify the subgrantee of changes to income prior to the required re-evaluations, as specified above.

2. **Assessment and Prioritization**

Subgrantees are required to have a written standard assessment process and tool(s) that are applied to all eligible recipients of shelter essential services. Prioritization for services must align with service area homeless and/or community needs assessment plans. When developed, subgrantees are required to comply with their services area(s) Continuum of Care assessment and prioritization requirements (576.400(d)), including verifying and documenting eligibility.

The CoC shall organize training opportunities for new hires and at least once annually to organizations and or staff persons at organizations that serve as access points or administer assessments as part of the Community Connect coordinated entry system. The purpose of the training is to provide all staff administering assessments with access to materials that clearly describe the methods by which assessments are to be conducted with fidelity to the CoCs coordinated entry written policies and procedures.

New hire training and orientation for Assessment Specialists performing Community Connect Screening shall include the following:

- Overview of the housing programs and resources aligned with Community Connect.
- Training in how to perform and assessment using client-centered approach.
- Confidentiality/privacy training that includes safety for persons fleeing domestic violence and how to determine program eligibility for appropriate referrals for persons with disabilities.
- Training on nondiscrimination and how to perform an assessment using a client centered approach that is culturally and linguistically sensitive.
- Safety planning and training.
- ServicePoint HMIS training.
- Training on how to conduct a trauma-informed assessment. Enroll and complete within 6 months of hire Trauma Informed Care course.
- Enroll and complete within 6 months of hire the Rent Well course, as this training provides the Assessment Specialist with information that is beneficial to serving people who are at risk of homelessness or have housing barriers.

Annual training for Assessment Specialists performing Community Connect Screening shall include the following:
• Overview of the most recent CoC Housing Inventory Chart (HIC) submitted to HUD, with emphasis on new/future housing resources
• Review of the assessment and referral process to ensure fidelity to the Community Connect policies and procedures
• Confidentiality/privacy training that includes safety for persons fleeing domestic violence and how to determine program eligibility for appropriate referrals for persons with disabilities
• Mental Health First Aid training
• Safety planning and training

Shelter essential services include: case management; child care; education services; employment assistance and job training; outpatient health services; legal services; life skills training; mental health services; substance abuse treatment services; transportation; and services for special populations. Provision of services should be determined based on client need and in alignment with subgrantee’s targeted populations.

Provision of essential services and shelter must be available to shelter residents for at least the time period during which the ESG funds are provided. Services do not need to be limited to a particular site as long as the site serves the same categories and types of homeless originally provided with essential services or serves homeless persons in the same service area where the subgrantee originally provided the services.

3. **Integration/Coordination with Mainstream Services**

Subgrantees are required to be active members of the COC and contribute to the identification, development and coordination of resources that will promote and increase the efficiency and effectiveness of the community’s homeless system. Subgrantees must coordinate and integrate, to the extent possible, their ESG-funded assistance with other programs serving homeless and at-risk of homelessness people within the service area, including referral process (refer to 24 CFR 576.400).

4. **Street Outreach**

Subgrantees are required to target unsheltered homeless individuals and/or families whose primary nighttime residence is a public or private place not meant for human habitation. It is recommended that preference be given to those special populations who are most vulnerable to being harmed by living in unsafe and unprotected places, i.e. victims of domestic and other forms of violence, youth, families with children, disabled, elderly, etc.

Engagement activities must include an initial assessment of needs and eligibility in order to prioritize the type and source of assistance required with safety and urgent health needs being the highest priority. Emergency health services, including mental health, can be funded with ESG only to the documented extent that other non-ESG funded appropriate health services are inaccessible or unavailable within the service area. Based on need and assessment, qualifying
individuals and/or families will be offered essential services beyond emergency health and other crisis intervention assistance that include case management, transportation, and housing stabilization. Whenever feasible, rapid re-housing will be a priority over the provision or referral to emergency shelter or transitional housing.

The three agencies in Washington County that currently provide street outreach services to the homeless include Open Door Counseling Center, Luke Dorf, and HomePlate Youth Services, which perform this work under subcontract through Community Action Organization. They are required to target unsheltered homeless individuals and/or families whose primary nighttime residence is a public or private place not meant for human habitation. It is recommended that preference be given to those special populations who are most vulnerable to being harmed by living in unsafe and unprotected places, i.e. victims of domestic and other forms of violence, youth, families with children, disabled, elderly, etc.

Street outreach providers may have multiple contacts with an individual or family prior to engagement in services. Engagement is defined as those activities intended to locate, identify and build relationships with unsheltered homeless people for the purpose of providing immediate support, intervention and connections with the homeless services and/or mainstream social services and housing programs. An individual or family is considered to have achieved “engagement” when an interactive client relationship results in a deliberate client assessment or beginning of a case plan and, therefore, requires an initial assessment of needs and eligibility in order to prioritize the type and source of assistance required. Safety and urgent health needs should be the highest priority. Based on need and assessment, qualifying individuals and/or families will be offered essential services that include case management, transportation, and housing stabilization. Whenever feasible, rapid re-housing will be a priority over the provision or referral to emergency shelter or transitional housing.

5. **Emergency Shelter Operations**

The Washington County Shelter Network is made up of five shelters; three in a system coordinated by Community Action and two others that operate in concert with the system but with procedures that are slightly different due to the special needs populations they serve. The three shelters coordinated by Community Action include the Community Action Shelter located in downtown Hillsboro, Family Promise of Washington County located in downtown Hillsboro, and the Good Neighbor Center located in Tigard. The two additional shelters that operate in concert with the system include Boys and Girls Aid Safe Place for Youth and the Domestic Violence Resource Center (Monica’s House). The Shelter Network works collaboratively to find other housing options, or if none, shelter opportunities, within the network of shelters so as to prevent households from living on the street.

**Procedure for the Shelters Coordinated by Community Action:**

**Admission:** To be admitted onto the Shelter Waitlist, the household must be a household with children and qualify as “homeless” based on HUD’s definitions under the HEARTH Act. Documentation of homelessness occurs either at the Community Connect Assessment, or at the
point of entry into the shelter. The Network will refer the household at the top of the list to re-housing opportunities (if applicable) or the next available shelter with open beds. The list for shelter is administered on a first come, first served basis with priority given to literally homeless families and families with an immediate safety need. Each shelter must adhere to the standardized method for documenting homeless status approved by the HSSN in order to be eligible for ESG assistance.

Individual Shelter admission criteria must be in compliance with Fair Housing Law and cannot force involuntary family separation by denying family admission based on the age of a child less than 18 years. All individuals, including transgender individuals and other individuals who do not identify with the sex they were assigned at birth, will receive equal access to program, benefits, services and accommodations in accordance with their gender identity without being subjected to intrusive questioning or being asked to provide documentation, in accordance with the HUD final rule entitled “Equal Access in Accordance with an Individual’s Gender Identity in Community Planning and Development Programs.”

**Diversion from Shelter:** Based on the results of the standardized assessment, individuals and families should be diverted when appropriate to the most stable housing available including supportive or subsidized permanent housing using the Housing First or Rapid Re-housing service models.

**Essential Services and Referral:** Emergency shelter participants must have access to essential services either through direct service delivery by the subgrantee and/or provision of information and referral to other service providers. Essential services include: case management; child care; education services, employment assistance and job training; outpatient health services; legal services; life skills training; mental health services; substance abuse treatment services; transportation; services for special populations and mainstream income and health benefits where appropriate.

**Length of Stay and Discharge:** Shelters will discharge families when they have reached the end of the stay (as dictated by Shelter policy). The Shelters will coordinate with the Shelter Network Coordinator to determine whether there are other options for housing available before the household is moved to the next shelter (to prevent discharging onto the street). To the maximum extent possible given resources in this jurisdiction, shelters will work to prevent release of households into homelessness. Limitations on individual and family shelter stays must be identified in writing in the subgrantees’ policies and procedures governing shelter operations and provided to all shelter residents at intake. The subgrantee must also have written denial, termination and grievance policies and procedures, in accordance with the requirements identified in this manual.

**Safety and Accommodations for Special Populations:** Any shelter facility that receives ESG assistance operations is required to meet all federal, state and local government safety, sanitation and accessibility standards including compliance with the safety, sanitation and privacy requirements contained in 24 CFR 576.403. Subgrantees are required to develop and
implement written procedures and communication tools/materials that ensure persons of any particular race, color, ethnicity, religion, sex, age, national origin, familial status, or disability who may qualify for shelter and essential services are aware of and have access to such facilities and assistance. Reasonable accommodations for persons with disabilities must be available in order to ensure disabled participants have an equal opportunity to utilize the shelter and receive essential services. Greater levels of accessibility may be required for some shelters in compliance with The Americans with Disabilities Act.

Subgrantees are also required to have written procedures in place that ensure access to shelter facilities, assistance and services for limited English proficiency (LEP) persons. It is highly recommended that subgrantees develop and implement an agency Language Access Plan following guidelines provided in the Fair Housing Guide for Shelter and Transitional Housing Providers which can be accessed at www.fhco.org or HUD guidelines located at: http://portal.hud.gov/hudportal/HUD?src=/program_offices/fair_housing_equal_opp/promotingfh/lep-faq.

Domestic violence victims and other persons in need of victim services must have access to a safe setting and have their identity protected. Subgrantees are required to implement procedures to ensure confidentiality of records pertaining to any individual who is provided family violence prevention, treatment or other services. Subgrantees must also certify that the address of a family/individual violence shelter will not be made public without permission of the shelter agency.

Subgrantee emergency shelter policies and procedures must:

- Prohibit disclosing personally identifying victim information to any third party without consent of the victim;
- Ensure victim consent is reasonably time-limited, written and specific as to whom information will be shared;
- Identify and utilize an alternative HMIS to collect program data that will prevent the disclosure of personally identifying victim information; and
- Include confidentiality policies and procedures that require staff to refrain from discussing client information in public and ensure client records are secure and only accessible to authorized staff.

Procedure for Boys and Girls Aid Safe Place for Youth:

Admission: Youth self-refer or are referred by outside source (Community Connect, police, schools, HomePlate, counseling services). Shelter accepts youth age 12 – 19. Clients must be sober (can work with clients seeking help with sobriety), have the ability to keep themselves safe in the community during daily unsupervised community time and non-aggressive. Agency does manage a waitlist and there are criteria (risk factors) for pulling off the list (not by first come first serve). Youth will not be placed on the list unless he or she has talked directly to staff, either by phone or in person.
All individuals, included transgender individuals and other individuals who do not identify with the sex they were assigned at birth, will receive equal access to program, benefits, services and accommodations in accordance with their gender identity without being subjected to intrusive questioning or being asked to provide documentation, in accordance with the HUD final rule entitled “Equal Access in Accordance with an Individual’s Gender Identity in Community Planning and Development Programs.”

**Diversion:** If the youth has just run away, Agency will try to divert from shelter by trying to get him or her back with family or family member before placing in the shelter.

**Referral:** While in care, Agency places a priority on a return to home or another family member if possible. Getting the youth to a stable resource is priority. Refer to Boys & Girls Aid’s Transitional Living Program (TLP) or other housing programs if available (Portland youth housing programs or Job Corps).

**Discharge:** Discharge after up to 30 days of stay at shelter (extensions possible). Discharge is ideally dictated by plan in place. Discharge into homelessness ONLY occurs when youth discharge themselves. Discharge into homelessness may occur for adults when they have exhausted their eligibility for shelter and no other housing resource/shelter is available. All efforts are made to prevent this type of discharge. If youth is making progress and space is available, youth may enter Extended Support Services at Safe Place and receive up to 90 additional days of shelter. The subgrantee must also have written denial, termination and grievance policies and procedures, in accordance with the requirements identified in this manual.

**Procedure for Domestic Violence Resource Center (Monica’s House):**

**Admission:** Clients will typically call in (drop-ins are not welcomed due to the confidential nature of the shelter). Stay at the shelter (Monica’s House) is intended to be only for those in imminent danger. Referrals are taken for all ages and clients are accepted regardless of gender. Single adults with their children are accepted, but not dual parents. Client must be sober, and exhibit appropriate behavior for communal living; a drug test is required and used as a method to assess needs of the individual, not to deny services. No wait list, clients are accepted into the shelter on a first come, first serve, based upon availability and that the victim is in “imminent danger”.

All individuals, included transgender individuals and other individuals who do not identify with the sex they were assigned at birth, will receive equal access to program, benefits, services and accommodations in accordance with their gender identity without being subjected to intrusive questioning or being asked to provide documentation, in accordance with the HUD final rule entitled “Equal Access in Accordance with an Individual’s Gender Identity in Community Planning and Development Programs.”
**Diversion:** DVRC evaluates the safety of a household to determine first whether there are options for diversion away from shelter prior to placing the household in shelter. If under imminent danger, then they are accepted. DVRC coordinates other services as needed to ensure that clients do not have to go into shelter if there are other options that do not compromise safety. Most are not “homeless”, or are only temporarily without housing, or have other housing options. Those who are literally “homeless” are referred to Community Action.

**Referral:** Referrals come from hospitals, other agencies, and even other jurisdictions across the country. The common thread of clients served by DVRC is not socioeconomic; DVRC primarily serves low-income clients, but that is not a criterion for services. 120 adult clients and 150 children (270 total) stay at Monica’s House annually. Some are referred to Survivor House (similar to Oxford House) or Oxford Recovery Living. Some are referred to Community Connect to access other homeless assistance programs, or will access the DV emergency grant to obtain financial assistance to secure housing (1st and last month’s rent, fees, etc.).

**Discharge:** DVRC will discharge clients when they are no longer in imminent danger and have identified a permanent housing option, typically 4 weeks, though there is no specified time limit. DVRC’s Case Manager coordinates with the clients weekly to discuss options for available housing before the household is moved to another shelter or to another housing option (to prevent discharging onto the street). To the maximum extent possible given resources in this jurisdiction, DVRC works to prevent release of households into homelessness, unless the client poses a threat to other clients staying at the shelter. Examples of unacceptable behavior include bringing alcohol or drugs into the shelter, bringing a perpetrator to the shelter, or bringing weapons on site. Additionally, aggressive or inappropriate behavior that is not conducive to communal living is also grounds for immediate dismissal from the shelter (clients with children are given more time to identify another housing option to prevent discharging to the street). The subgrantee must also have written denial, termination and grievance policies and procedures, in accordance with the requirements identified in this manual.

**Safety and Accommodations for Special Populations:** Any shelter facility that receives ESG assistance operations is required to meet all federal, state and local government safety, sanitation and accessibility standards including compliance with the safety, sanitation and privacy requirements contained in 24 CFR 576.403.

Subgrantees are required to develop and implement written procedures and communication tools/materials that ensure persons of any particular race, color, ethnicity, religion, sex, age, national origin, familial status, or disability who may qualify for shelter and essential services are aware of and have access to such facilities and assistance. Reasonable accommodations for persons with disabilities must be available in order to ensure disabled participants have an equal opportunity to utilize the shelter and receive essential services. Greater levels of accessibility may be required for some shelters in compliance with The Americans with Disabilities Act.
Subgrantees are also required to have written procedures in place that ensure access to shelter facilities, assistance and services for limited English proficiency (LEP) persons. It is highly recommended that subgrantees develop and implement an agency Language Access Plan following guidelines provided in the Fair Housing Guide for Shelter and Transitional Housing Providers which can be accessed at www.fhco.org or HUD guidelines located at: http://portal.hud.gov/hudportal/HUD?src=/program_offices/fair_housing_equal_opp/promotingfh/lep-faq.

Domestic violence victims and other persons in need of victim services must have access to a safe setting and have their identity protected. Subgrantees are required to implement procedures to ensure confidentiality of records pertaining to any individual who is provided family violence prevention, treatment or other services. Subgrantees must also certify that the address of a family/individual violence shelter will not be made public without permission of the shelter agency.

Subgrantee emergency shelter policies and procedures must:

- Prohibit disclosing personally identifying victim information to any third party without consent of the victim;
- Ensure victim consent is reasonably time-limited, written and specific as to whom information will be shared;
- Identify and utilize an alternative HMIS to collect program data that will prevent the disclosure of personally identifying victim information; and
- Include confidentiality policies and procedures that require staff to refrain from discussing client information in public and ensure client records are secure and only accessible to authorized staff.

6. **Homeless Prevention Assistance**

An agency awarded ESG assistance under homelessness prevention will be required to utilize OCD-approved documentation standards for income, HUD standards for at risk of homelessness, risk factors (if applicable), and assessment tools. Prioritization for homeless prevention assistance must comply with Continuum of Care standards. Minimally, prioritization should align with vulnerable homeless and at-risk of homelessness populations identified in subgrantee’s service area homeless plan(s) and/or community assessment(s).

ESG regulations require that subrecipients use the Part 5 definition of income for all activities under the ESG program, define at 24 CFR 5.609. OCD staff will conduct training to provide agencies technical assistance on how to count income and calculate rent assistance payments under this definition. Households assisted with prevention assistance will be required to pay 30% of their income towards rent and utilities. This calculation shall be included in the income documentation so that both household income and household’s share of rent will be clearly documented. ESG Program Participants will be eligible to receive up to 24 months of assistance for prevention, but not to exceed a maximum of 24 months of
assistance per 24 CFR 576.105(a)(3) and 576.106(a)(2). There will be no adjustment of the portion of rent paid by tenant over the assistance period, which will remain at 30% of adjusted gross income as determined under the Part 5 definition of income. The subrecipient must re-evaluate the program participant’s eligibility and amount of assistance needs every 3 months for prevention assistance. A participant may come back to the program at any point within the program year to receive homeless prevention and rapid re-housing rent and financial assistance, but the total amount of assistance received must be within the above limits.

Housing Relocation and Stabilization Services (HRSS) may include housing search and placement, housing stability case management, and mediation. Credit repair and legal services are allowed and may be included but would only be eligible if provided by a third party that had gone through OCD-approved procurement process. The minimum amount of HRSS shall be a once per month in-person meeting with the client, though the goal would be for more. The duration of HRSS will be tied at a minimum to the length of rent assistance provided, but can continue for a longer period depending on the needs of the household. A participant may come back to the program at any point to receive HRSS but the total amount of assistance received must be within the above limits.

Other general program requirements for either rent-assistance activity under the ESG program include provisions that:

- The unit must be suitable for household size. The unit rents must not exceed Section 8 Fair Market Rents. The unit must have a rent that is documented by staff as being reasonable as compared to other units of similar size and with similar amenities. The unit and shelter must conform with Lead Based Paint remediation and disclosure.
- The unit must be Habitable (as documented by the Habitability Checklist, completed by ESG Subrecipient). The shelter must be habitable to receive ESG assistance (documented by OCD staff).

7. **Rapid Re-Housing Assistance**

An agency awarded ESG assistance under rapid re-housing will be required to utilize HUD standards for homelessness, risk factors (if applicable), and assessment tools. Prioritization for rapid re-housing must comply with Continuum of Care standards and be supported by subgrantee service area homeless plans and/or community assessment data. Local prioritization should also align with HUD’s homeless strategic plan goals for ending chronic homelessness, homelessness among Veterans, and families with children and youth homelessness.

ESG Program Participants will be eligible to receive up to 24 months of assistance for rapid re-housing, but not to exceed a maximum of 24 months of assistance per 24 CFR 576.105(a)(3) and 576.106(a)(2). There will be no adjustment of the portion of rent paid by a tenant over the assistance period, which will remain at 30% of adjusted gross income as determined under the
Part 5 definition of income. The subrecipient must re-evaluate the program participant’s eligibility and amount of assistance needs annually for re-housing assistance. A participant may come back to the program at any point within the program year to receive rapid re-housing rent and financial assistance, but the total amount of assistance received must be within the above limits.

Housing Relocation and Stabilization Services (HRSS) will include housing search and placement, housing stability case management, and mediation. Credit repair and legal services are allowed and may be included but would only be eligible if provided by a third party that had gone through OCD-approved procurement process.

The minimum amount of HRSS shall be a once per month in-person meeting with the client, though the goal would be for more. The duration of HRSS will be tied at a minimum to the length of rent assistance provided, but can continue for longer period depending on the needs of the household. A participant may come back to the program at any point to receive HRSS but the total amount of assistance received must be within the above limits. Other general program requirements for either rent-assistance activity under the ESG program include provisions that:

- The unit must be suitable for household size.
- The unit rents must not exceed Section 8 Fair Market Rents.
- The unit must have a rent that is documented by staff as being reasonable as compared to other units of similar size and with similar amenities.
- The unit and shelter must conform with Lead Based Paint remediation and disclosure.
- The unit must be Habitable (as documented by the Habitability Checklist, completed by ESG Subrecipient).

B. HMIS Data Collection
All data on persons served and all activities funded with ESG must be entered into HMIS in accordance with current data standards. The purpose of the HMIS is to record and store client-level information about the numbers, characteristics, and needs of homeless and at risk homelessness persons who receive program assistance.

HMIS (Homeless Management Information System) is a single platform database providing an unduplicated count of homeless people in Washington County. To date there are 15 service providers entering data into HMIS representing 48 service agencies. The programs include Emergency Shelters, Transitional Housing Programs, Permanent Supportive Housing Programs, Services only programs, Homelessness Prevention and Rapid Rehousing (HPRP) and other local funding programs. That data is used to inform both local and statewide public policy about the extent and nature of homelessness, captures client level data and assists agencies with tracking outcome measures for each homeless client entered into the system, allows agencies to pull aggregate data to assist with writing grants and applying for needed funds, plan for the reduction/ending of homelessness with uniform, longitudinal data by which to make effective
programming decisions, to educate citizens about homeless families and youth in Washington County.

All ESG recipients must ensure that data on all persons served and all activities assisted under ESG are entered into the applicable community-wide HMIS in the area in which those persons and activities are located, or a comparable database, in accordance with HUD’s standards on participation, data collection, and reporting under a local HMIS.

If the subrecipient is a victim service provider or a legal services provider, it may use a comparable database that collects client-level data over time (i.e., longitudinal data) and generates unduplicated aggregate reports based on the data. Information entered into a comparable database must not be entered directly into or provided to an HMIS. All ESG-funded agencies must either currently be an HMIS user or will be required in their contract for ESG funding to obtain HMIS licensing as a condition of funding. This will be a requirement of any ESG funded contract. Washington County HMIS policies and procedures are in compliance with generally accepted standards adopted by regional partner agencies that form the Northwest Social Services Consortium (coordinated by the City of Portland). Washington County’s victim service provider will use an accepted HMIS-like system approved by the County’s HMIS Administrator. (Note: this is already in place in Washington County).

C. Continuum of Care Coordination

Washington County Office of Community Development (OCD) consulted with members of the Housing and Supportive Services Network (HSSN), the Continuum of Care (CoC) body for the area to discuss the activities to be funded under new regulatory guidelines of ESG. The HSSN Strategic Planning Workgroup members were asked to attend a meeting held on February 10, 2017 to assist in the consultation process. Participants of this meeting included current recipients under the Emergency Shelter Grant program and other service providers in the area representing all segments of the CoC; including domestic violence providers, permanent supportive housing providers, emergency shelter providers, and emergency service providers.

The general consensus of the HSSN Strategic Planning Workgroup was for the continued funding of all activities allowable under the new ESG (with the exception of HMIS activities), with an emphasis on Homelessness Prevention and Rapid Re-Housing activities due to the importance that the U.S. Department of Housing and Urban Development has placed on looking predominantly toward Prevention and Rapid Re-Housing as an effective way for communities to combat homelessness. In addition, it was agreed that funding for operations of shelters and street outreach activities serves a crucial element in the road to transitioning individuals and families from homelessness and into permanent housing. After the HSSN Strategic Planning Workgroup determined funding priorities, final consultation with the entire HSSN occurred on March 1, 2017.
Washington County’s Continuum of Care (Housing and Supportive Services Network) provides the main coordination function to ensure knowledge of the services available in the Continuum from shelter providers, essential services providers, homelessness prevention and rapid re-housing providers, other homeless assistance providers, and mainstream, employment service and housing providers. The Coordination Policy is carried out by the following:

HSSN:
- Regular attendance at HSSN monthly meetings.
- Homeless subcommittee monthly meetings
- Annual updates from ESG Recipient to HSSN on status of ESG activities including consultation opportunities.
- Ensuring the mainstream and employment service providers attend HSSN meetings regularly.
- Encourage homeless consumer input in developing programs and the homeless response system.

Other:
- Coordination of the Shelter Network
- Requirement of ESG-funded agencies to coordinate and integrate to the maximum extent practicable with mainstream and employment service providers.

D. Discharge Planning
The McKinney Vento Act requires that State and local governments have policies and protocols in place to ensure that persons being discharged from publicly-funded institutions or systems of care are not discharged immediately into homelessness. To comply with the requirement at 24 CFR 91.220(i)(1)(iv)(A), Washington County Continuum of Care (CoC) has developed planning policies and protocols for assisting low-income persons being discharged from publicly-funded institutions or systems of care.

Washington County certifies yearly that there are policies regarding discharge planning to minimize homelessness following discharge from publicly funded institutions. Through the County's application under the Continuum of Care, protocols are outlined that deal with youth exiting foster care, persons leaving the health care system, persons leaving the Oregon State Hospital and inmates being released from correctional facilities. In summary, Oregon's Department of Human Services' Child Welfare Division prepares individual discharge plans for youth leaving the foster care system. The transition plan is carried out through three different Independent Living Programs. The Oregon State Hospital defines the discharge process for clients leaving the hospital through a comprehensive treatment care plan. Discharge assessment and planning for discharge begins upon admission and continues through hospitalization. Washington County's Mental Health and the Oregon State Hospital have entered into an agreement concerning policies and procedures to be followed by the local program and the
hospital when a patient is admitted and discharged. The Oregon Department of Corrections prepares a discharge plan for inmates as they near release from incarceration. The Department of Corrections forwards to Washington County's Community Corrections a copy of the individualized Transition Plan. Prison release counselors, Corrections Center residential counselors and probation/parole officers take an active role in developing transitional release plans that may include provisions for, but are not limited to, housing, employment, continuing education, supportive services, conditions and level of supervision. Local hospitals perform discharge in accordance with Standards of Practice governing health care operations. Both non-profit hospitals have internal social service departments that manage the discharge of patients through job descriptions and electronic discharge forms completed by hospital case managers. Hospitals work in partnership with community social service providers to refer homeless to appropriate programs. The following describes Washington County CoC’s efforts to coordinate with and/or assist in State or local discharge planning efforts to ensure that discharged persons are not released directly to the streets, emergency homeless shelters, or other McKinney-Vento homeless assistance programs.

1. **Discharge Planning: Foster Care**

The discharge plan was not developed by the State or the CoC. Providence St. Vincent Medical Center and Tuality Healthcare hospitals are local, independent health care providers, and discharge in accordance with Standards of Practice governing health care operations. Providence St. Vincent Medical Center and Tuality Healthcare participate in CoC planning and hospital administration is represented on the Homeless Plan Advisory Committee, a high-level leadership committee. Both hospitals have internal Social Service departments that manage the discharge of patients through job descriptions and electronic discharge forms completed by hospital case managers.

The CoC reviews the hospital discharge process annually. Hospital case managers work in partnership with CoC outreach workers and community social service agencies to refer homeless to appropriate community-based service programs and address special needs of the homeless beyond healthcare. Hospitals partner with Central City Concern to discharge homeless needing acute medical care into the Recuperative Care Program, or provided motel accommodations for homeless with less severe health care issues.

The CoC and hospital case managers work collaboratively to support the needs of homeless people, as many homeless experiencing a major health crisis will decide to engage in services to end their homelessness.

The Homeless Plan Advisory Committee is a high-level leadership committee including hospital administration, elected officials, directors of housing and service programs, formerly homeless, and other representatives. These stakeholders support research to prepare a Homeless Cost Study that will provide the CoC and community leaders with data on the cost of homelessness on health care and other institutions. The report will demonstrate costs of chronic homelessness in the community, and support reallocation and creation of funding to provide
housing programs demonstrating outcomes in ending chronic homelessness, and reducing occurrences of homelessness.

A holistic assessment is performed by the hospital to determine the individual’s needs for ongoing health care, services and housing prior to discharge from the health care system. Where possible, the hospital case worker will contact family and friends of the homeless client to support reunification that leads to housing outcomes.

Homeless with acute health care conditions are referred to the Recuperative Care Program, a locally funded program. Homeless with less severe health care are provided assistance through motel vouchers, and assistance in connecting with community service providers and mainstream resources. This may include locally-funded resident recovery and transitional housing programs, group homes, and low-income affordable housing.

2. Discharge Planning: Health Care
The State mandated discharge policy for the Oregon State Hospital is managed by the Oregon Health Authority (OHA), Addiction and Mental Health Division, as outlined in OAR 309-091, Division 91 State Hospital Admission and Discharge. The Washington County Mental Health Division is an active participant in the CoC planning process, and provides revised statute updates on Discharge Planning, in addition to the State’s work to develop coordinated care organizations (CCO) that are responsible for delivering integrated physical health, mental health and addictions care to people served by the Oregon Health Plan, and to ensure that the new model of care includes a clear understanding of the essential role peer-delivered services play in behavioral health.

Mental Health Services are delivered through a network of non-profit mental health providers that are actively involved in the CoC planning, to include LifeWorks NW, Luke-Dorf, Inc., and Sequoia Mental Health Services, Inc.

The Oregon State Hospital (OSH) begins discharge assessment and planning for discharge upon admission to the hospital, and continues this process throughout hospitalization resulting in a comprehensive treatment plan. OSH and the Washington County Mental Health Division have entered into an agreement outlining the policies and procedures to be followed by the local Community Mental Health program when an individual is admitted to OSH, and upon determination of discharge to support the transition with housing, treatment, and other services assessed as needed to support the continuity of care necessary to maintain the individual’s stability in the community. The CoC’s Mental Health and Special Needs Community Consortium (MHSNCC) include the Oregon Health Authority (OHA), National Alliance for the Mentally Ill (NAMI), County and non-profit mental health and substance providers, health care, homeless consumer, and housing providers. The State and local MHSNCC collaborate to ensure persons are not discharged into homelessness.
The Washington County Mental Health Division provides care coordination with the hospital social workers for persons discharging from the Oregon State Hospital to ensure that individuals are connected to mental health treatment, social services and housing appropriate to the client’s needs and desires. Housing opportunities include licensed residential services, group homes, State and locally-funded transitional housing, and market rate apartments. The Oregon Addictions and Mental Health Division together with consumers, Oregon’s Mental Health Organizations (MHO) and Community Mental Health Programs, implemented a new innovative program, Adult Mental Health Initiative (AMHI) that transfers responsibility for managing residential services to Oregon’s Mental Health Organizations in local communities. This partnership improves coordination for adult mental health services at all levels of care in the system. The CoC was briefed on this program at the time of implementation.

3. **Discharge Planning: Mental Health**

For persons preparing to leave the Oregon State Prison, the State-mandated discharge policy is administered by the Oregon Department of Corrections (OR-DOC) under OAR 255-060-0008, Division 60 Release to Post-Prison Supervision or Parole and Exit Interviews and statutory authority ORS 144.096, ORS 144.125 and ORS 144.185. For offenders who originated in Washington County, thirty days before discharge the OR-DOC forwards a copy of the offenders Release Plan (Form PBM208B) to Washington County Department of Corrections (WCCC), the Local Supervisory Authority.

The WCCC and local law enforcement are active members in the CoC planning process, and work collaboratively with CoC partner agencies to support the offenders individualized Release Plan, to include housing, employment, education, support services and treatment programs. HMIS is used to track homeless people who reported recent discharge from the Prison system. The Washington County Department of Community Corrections (WCCC), the Local Supervisory Authority, in partnership with the Oregon State Prison and Oregon Department of Corrections (OR-DOC) work collectively to develop the Release Plan approved by the Oregon Board of Parole and Post-Prison Supervision prior to offender’s discharge. The Board works in partnership with the OR-DOC and the WCCC to set conditions of supervision for all offenders being released from Oregon prisons, and determines whether discharge from supervision is compatible with public safety.

The Oregon State Prison nurse sends referrals to Cascade AIDS Project (CAP) for persons being discharged that are HIV+. CAP has a HOPWA SPNS grant for housing assistance and services for people involved with the corrections system and assists with discharge planning.

WCCC and Washington County Jail are represented on the Homeless Plan Advisory Committee that provides policy leadership to address State-mandated discharge.

Washington County Department of Community Corrections (WCCC) has established partnerships with housing providers offering private, State and locally-funded beds within 38 separate clean and sober housing facilities, 20 regular group housing facilities that are used by people under supervision, and the 12 bed Community Corrections Center’s transitional program. WCCC
maintains close relationships with each of these housing facilities, with Probation Officer (PO) visits to each home on a regular basis (when supervised offenders reside in the home). These strong collaborative ties have enhanced the County’s ability to quickly access beds. The majority of people transitioning from prison facilities eventually reside in private housing either with family, friends or by themselves. Each person releasing from prison must have a residence approved by their PO.

E.  Performance Standards

The 2015-2020 Consolidated Plan for Washington County and the Cities of Beaverton and Hillsboro describes community needs and determines local priorities for using public resources to assist low and moderate-income residents. The Consolidated Plan includes performance objectives and outcomes for all of its programs, including the Emergency Solutions Grant (ESG) funds. The performance objectives and standards by activity shows how the eligible activities of street outreach, emergency shelter operations, homeless prevention assistance and rapid re-housing assistance fit into HUD performance objectives, performance standards, federal and local plans to end homelessness, and Consolidated Plan Objectives.
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<th>Eligible Activities*</th>
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<th>Emergency Shelter</th>
<th>Homeless Prevention</th>
<th>Rapid Re-Housing</th>
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<td><strong>Performance Objectives (HUD standards)</strong></td>
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<table>
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<tr>
<th>Performance Objectives</th>
<th>Entry and exit measures Destination at exit</th>
<th>Reducing the time spent homeless</th>
<th>Reduce the time spent homeless</th>
<th>Reduce the time spent homeless</th>
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<tbody>
<tr>
<td>Objective: Transform homeless services to crisis response systems that prevent homelessness and rapidly return people who experience homelessness to stable housing.</td>
<td>Measurement: Number of individuals who participate in Community Connect, Washington County's Coordinated and Centralized Assessment System</td>
<td>Measurement: Average shelter stay for families exiting to permanent housing</td>
<td>Measurement: Length of time families spent on the shelter wait list last year</td>
<td>Measurement: Reduction in new incidences of homelessness and a reduced recidivism rate.</td>
</tr>
</tbody>
</table>

| Opening Doors: Federal Strategic Plan to Prevent and End Homelessness Objectives (U.S. Interagency Council on Homelessness) | | | | |
| Objective 10: Transform homeless services to crisis response systems that prevent homelessness and rapidly return people who experience homelessness to stable housing. | While funding to support Emergency Shelter activities cannot be directly linked to a goal identified in the federal strategic plan, the need for shelters is still recognized as a crucial component of the County's homelessness crisis response system. | Objective 6: Improve access to mainstream programs and services to reduce people's financial vulnerability to homelessness. | Objective 3: Provide affordable housing to people experiencing or most at risk of homelessness |

| Washington County's 10-Year Plan to End Homelessness Goals | Goal 3: Link people to appropriate services and remove barriers | While funding to support Emergency Shelter activities cannot be directly linked to a goal identified in Washington County's 10-Year Plan to End Homelessness, the need for shelters is still recognized as a crucial component of the County's homelessness crisis response system. | Goal 1: Prevent people from becoming homeless | Goal 2: Move people into housing |

| Consolidated Plan Objective | C.8.v Provide outreach services to homeless persons and families. C.8.n Provide services through “Community Connect”, Washington County's Coordinated and Centralized Assessment System (CCAS), to provide a central point of referral for homeless and at-risk households to prevent and end episodes of homelessness. | C.8.b Provide supportive services and case management to vulnerable populations including homeless, mentally ill, persons with HIV/AIDS. | C.8.e Provide one-time or short-term rental support for low-income persons at risk of becoming homeless. | C.8.w Provide case management services to homeless families or those at risk of becoming homeless including those fleeing from domestic violence. C.8.a Provide supportive services to homeless individuals and families (and those at risk of homelessness) that would include, but not be limited to, child care, housing education (e.g. Rent Well), mental health and addiction counseling, employment training, information and referral, parenting skills, accessing housing, and homeless prevention services. |

*Note: Objective and outcomes reporting is not applicable for Administration and HMIS activities.*
II. Client Eligibility

A. Assessment
All applicants must be assessed to determine eligibility for receipt of ESG funded services. Homeless or at-risk of homelessness households who meet one or more of HUD determined categorical homeless definitions or criteria are eligible to receive program assistance. Household composition includes an individual living alone, family with or without children, or a group of individuals who are living together as one economic unit. In all cases a household must lack sufficient resources and support networks necessary to obtain or retain housing without the provision of ESG assistance in order to be program eligible. The type of ESG assistance for which an eligible household qualifies is determined by the stability of their current housing or their homeless status.

B. Categorical Homeless Definitions and Criteria
Eligible applicants for program services must meet one of the following categorical definitions of homeless or criteria for being at-risk of homelessness:

Category 1: Literally homeless
A household that lacks a fixed, regular, and adequate nighttime residence, meaning:
- Living in a primary nighttime residence that is a public or private place not designed for or ordinarily used for as a regular sleeping accommodation for human beings, including a car, park, abandoned building, bus or train station, airport, or camping ground); or
- Living in a supervised 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, or local government programs for low-income individuals); or
- Exiting an institution where he or she resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering the institution.

Category 2: Imminent risk of homelessness
A household that will imminently lose their primary nighttime residence, provided that:
- The residence will be lost within 14 days of the date of application for homeless assistance; and
- No subsequent residence has been identified; and
- The household lacks the resources or support networks needed to obtain other permanent housing.
Category 3: Imminent risk of homelessness

Unaccompanied youth under 25 years of age, or family who do not otherwise qualify as literally homeless or imminent risk of homelessness, but who:


- Have not had a lease, ownership interest, or occupancy agreement in permanent housing at any time during the 60 days immediately preceding the date of application for homeless assistance; and

- Have experienced persistent instability as measured by two moves or more during the 60-day period immediately preceding the date of applying for homeless assistance; and

- Can be expected to continue in such status for an extended period of time because of chronic disabilities, chronic physical health or mental health conditions, substance addiction, histories of domestic violence or childhood abuse (including neglect), the presence of a child or youth with a disability, or two or more barriers to employment, which include the lack of a high school degree or General Education Development (GED), illiteracy, low English proficiency, a history of incarceration or detention for criminal activity, and a history of unstable employment.

Category 4: Fleeing, or attempting to flee, domestic violence

A household who:

- Is fleeing, or is attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or a family member, including a child, that has either taken place within the individual’s or family’s primary nighttime residence or has made the individual or family afraid to return to their primary nighttime residence; and

- Has no other residence; and

- Lacks the resources or support networks to obtain other permanent housing.

C. Criteria for At Risk of Homelessness Qualification

Applicants for program services for at-risk individuals or households must meet the following definition of At Risk of Homelessness:

- Have an annual income at or below 30% of median household income for the area; and

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• Do not have sufficient resources or support networks immediately available to prevent them from moving to an emergency shelter or another place defined in Category 1 of the “homeless” definition; and meet one of the following conditions:

• Has moved because of economic reasons two or more times during the 60 days immediately preceding the application for assistance; or

• Is living in the home of another because of economic hardship; or

• Has been notified in writing that their right to occupy their current housing or living situation will be terminated within 21 days after the date of application for assistance; or

• Lives in a hotel or motel and the cost is not paid for by charitable organizations or by Federal, State, or local government programs for low-income individuals; or

• Lives in an SRO or efficiency apartment unit in which there reside more than two persons or lives in a larger housing unit in which there reside more than one and a half persons per room; or

• Is exiting a publicly funded institution or system of care (such as a health-care facility, a mental health facility, foster care or other youth facility, or correction program or institution);

D. Criteria for Chronically Homeless Qualification

Chronically homeless means:

(1) A “homeless individual with a disability,” as defined in section 401(9) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11360(9)), who:

(i) Lives in a place not meant for human habitation, a safe haven, or in an emergency shelter; and

(ii) Has been homeless and living as described in paragraph (1)(i) of this definition continuously for at least 12 months or on at least 4 separate occasions in the last 3 years, as long as the combined occasions equal at least 12 months and each break in homelessness separating the occasions included at least 7 consecutive nights of not living as described in paragraph (1)(i). Stays in institutional care facilities for fewer than 90 days will not constitute as a break in homelessness, but rather such stays are included in the 12-month total, as long as the individual was living or residing in a place not meant for human habitation, a safe haven, or an emergency shelter immediately before entering the institutional care facility;

(2) An individual who has been residing in an institutional care facility, including a jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and met all of the criteria in paragraph (1) of this definition, before entering that facility; or
(3) A family with an adult head of household (or if there is no adult in the family, a minor head of household) who meets all of the criteria in paragraph (1) or (2) of this definition, including a family whose composition has fluctuated while the head of household has been homeless.

Evidence of chronically homeless individuals must be kept in the program participant file in order to demonstrate that an individual or family met the definition of “chronically homeless” at the point of entry into a program.

E. Income Determination and Requirements

1. Income Eligibility

Homeless prevention assistance requires applicants to be at or below 30% AMI at time of intake. Rapid re-housing does not have income eligibility requirements at the time of intake; however, to qualify for continuation of rapid re-housing assistance, an applicant must have an annual income at or below 30% AMI at the time of re-evaluation. There are no other initial income eligibility requirements to receive program services.

2. Calculating Gross Annual Income Eligibility

Annual Income is the gross amount of income anticipated to be received by a household during the coming year based on the household’s circumstances at the time of program intake and assessment. Annual Income determination is consistent with the “Part 5” definition of annual Income found at 24 CFR 5.609.

When determining the annual income of a household to establish eligibility for ESG assistance, subgrantee must count the income of all adults in the household, including nonrelated individuals, within the limitations imposed by 24 CFR 5.609. Not everyone living in the unit is considered a member of the household for the purposes of determining a household’s income. Excluded persons include: foster children, foster adults, live-in aides, children of live-in aides and an unborn child. A child subject to a shared-custody agreement should be counted as a household member if the child resides with the household at least 50 percent of the time.

Income generated by an asset, such as the interest on a savings or checking account is considered household income even if the household elects not to receive it. For example, though an applicant may elect to reinvest the interest or dividends from an asset, the interest or dividends are still counted as income anticipated to be received during the coming 12 months. Asset income is discussed in 24 CFR 5.609. Income producing assets include: bank accounts; life insurance policies; lump sum additions (legal settlement, refund, etc.); personal property held as investments; retirement/pension funds; trusts; assets disposed of for less than fair market value; and stocks, bonds or mutual funds. Additional guidance on determining income eligibility is available in Appendix 2.
F. Eligibility Documentation and Recordkeeping

Subgrantees must establish written intake procedures that include requirement of written documentation verifying eligibility for program services in accordance with the following preferred order of documentation:

1. **Third-party Verification**

   Third party documentation is the preferable form of verification and includes but is not exclusive to written statement or document from employer, landlord, public benefit worker, or agency service provider. Written verification sent directly to program staff or via the applicant is preferred.

2. **Intake/Case Manager Worker Observation**

   Staff documentation may include oral statements made by a social worker, case manager, or other appropriate official at an institution, shelter, or other facility and documented by the program intake worker/case manager. Use of oral statements is allowable when third-party documentation is not available.

3. **Participant Self-certification**

   Self-certification requires a written and signed document by the individual or head of household seeking assistance attesting to the eligibility facts for which they are certifying. A third party may be designated by a participant to sign documents on their behalf when they are unable to do so. If needed, subgrantee must provide access to language interpretation services and assistive devices necessary for participants to understand the documents they are certifying.

   Self-certification documentation is only used when documented staff efforts verify that third-party or worker observation documentation is not available. However, lack of third-party documentation must not prevent an individual or household from being immediately admitted to emergency shelter, receiving street outreach services or immediately accessing domestic violence/victim service shelter and assistance.

   Documentation verifying eligibility must be available in client files or if kept electronically, available upon request. See the appendices in this manual for examples of appropriate documentation of applicant eligibility.
III. Allowable Program Service Components and Activities

A. Service Components and Homeless Eligibility

ESG funds can pay for five program service components: Street Outreach; Emergency Shelter; Homelessness Prevention; Rapid Re-housing; and Homeless Management Information System (HMIS). Washington County Office of Community Development, in consultation with the Housing and Supportive Services Network has chosen to focus ESG funds on Street Outreach, Emergency Shelter, Homeless Prevention and Rapid Rehousing. The following chart shows which service components are available for homeless and/or at-risk households.

<table>
<thead>
<tr>
<th>Component</th>
<th>Serving</th>
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<tbody>
<tr>
<td></td>
<td>Those who are Homeless</td>
</tr>
<tr>
<td>1) Street Outreach</td>
<td>✔</td>
</tr>
<tr>
<td>2) Emergency Shelter</td>
<td>✔</td>
</tr>
<tr>
<td>3) Homelessness Prevention</td>
<td></td>
</tr>
<tr>
<td>4) Rapid Re-housing</td>
<td></td>
</tr>
</tbody>
</table>

B. Street Outreach

Street outreach is service delivery for the specific purpose of reaching out to unsheltered homeless people; connecting them with emergency shelter, housing, or critical services; and providing urgent, non-facility-based care. Individuals defined as unsheltered must meet the criteria for: Category 1, literally homeless; or Category 4, fleeing/attemping to flee domestic violence (where the individual or household also meet the criteria for category 1); and are:

- living on the streets (or other places not meant for human habitation); and
- unwilling or unable to access services in emergency shelter.

1. Engagement Services

Engagement Services are activities to locate, identify, and build relationships with unsheltered homeless people to offer immediate support, intervention, and connections with homeless assistance programs and/or mainstream social services and other housing programs. Eligible costs include:

- Conducting an initial assessment of applicant needs and eligibility;
- Providing crisis counseling;
- Addressing urgent physical needs, such as providing meals, blankets, clothes, or toiletries;
- Actively connecting and providing information and referrals to needed services; and
- Cell phone costs of outreach workers.
2. **Case Management**

Case Management activities to assess housing and service needs and arrange, coordinate and/or monitor the delivery of individualized services. Eligible costs include:

- Assessment and intake including using coordinated entry;
- Conducting initial evaluations including, verifying and documenting eligibility;
- Counseling;
- Developing/securing/coordinating services;
- Helping obtain Federal, State, and local benefits;
- Monitoring and evaluating program participant progress;
- Providing information and referrals to other providers; and
- Developing an individualized housing stabilization plan that leads to the attainment of stable permanent housing.

C. **Emergency Shelter**

Emergency shelter means any appropriate facility that has the primary use of providing temporary or transitional shelter for the homeless in general or for specific populations of the homeless and the use of which does not require occupants to sign leases or occupancy agreements. Shelter operations are costs to operate and maintain emergency shelters and also provide other emergency lodging when appropriate. Eligible Costs include:

- Minor or routine maintenance;
- Rent;
- Security;
- Fuel;
- Equipment;
- Insurance;
- Utilities;
- Food;
- Furnishings;
- Supplies necessary for the operation of the emergency shelters; and
- Hotel/Motel voucher, only for families and individuals where no emergency shelter is available.

D. **Homelessness Prevention and Rapid Re-housing**

Homelessness Prevention Services are intended to prevent persons who are housed from becoming homeless by helping them regain stability in their current housing or other permanent housing. Eligible participants must be at imminent risk of homelessness, homeless under other federal statutes, fleeing/attempting to flee domestic violence or meet the criteria
for being at-risk of homelessness and have annual incomes at or below 30% of area median income. Rapid re-housing services are intended to help eligible participants who are literally homeless, including fleeing/attempting to flee domestic violence, to transition from the streets or shelter as quickly as possible into permanent housing and achieve housing stability. Eligible participants for either service component must lack the resources or support networks to help them retain or obtain other appropriate, stable housing.

If a client was first assisted under homelessness prevention and then became homeless, Subgrantee must exit the client from the homelessness prevention component and enter the individual or household into the rapid re-Housing component.

1. Homelessness Prevention and Rapid Re-housing Comparison

The chart below shows the differences between Homelessness Prevention and Rapid Re-Housing service components.

<table>
<thead>
<tr>
<th>Eligible Participants</th>
<th>Homelessness Prevention</th>
<th>Rapid Re-Housing</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Category 2 – Imminent Risk</td>
<td>Category 1 – Literally Homeless OR Category 4 – Fleeing/Attempting to Flee Domestic Violence</td>
</tr>
<tr>
<td></td>
<td>Category 3 – Other Federal Statutes</td>
<td>Category 4 – Fleeing/Attempting to Flee Domestic Violence</td>
</tr>
<tr>
<td></td>
<td>Category 4 – Fleeing/Attempting to Flee Domestic Violence OR At-Risk of Homelessness</td>
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<table>
<thead>
<tr>
<th>Purpose</th>
<th>Homelessness Prevention</th>
<th>Rapid Re-Housing</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>To prevent persons who are housed from becoming homeless</td>
<td>To help homeless persons living on the streets or in an emergency shelter transition as quickly as possible into permanent housing, and then</td>
</tr>
<tr>
<td></td>
<td>To help such persons regain stability in their current housing or other permanent housing</td>
<td>To help such persons achieve stability in that housing</td>
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<table>
<thead>
<tr>
<th>Reassessment</th>
<th>Homelessness Prevention</th>
<th>Rapid Re-Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Every 3 months</td>
<td>Every 12 months</td>
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<tr>
<td></td>
<td>Must have income at or below 30% AMI, AND</td>
<td>Must have income at or below 30% AMI, AND</td>
</tr>
<tr>
<td></td>
<td>Lack resources and support network</td>
<td>Lack resources and support network</td>
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<table>
<thead>
<tr>
<th>Eligible Activities</th>
<th>Homelessness Prevention</th>
<th>Rapid Re-Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Relocation and Stabilization Services and Financial Assistance</td>
<td>Housing Relocation and Stabilization Services and Financial Assistance</td>
<td></td>
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<tr>
<td>Short- and Medium-Term Rental Assistance</td>
<td>Short- and Medium-Term Rental Assistance</td>
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2. Housing Relocation and Stabilization Financial Assistance

ESG funds may be used to pay landlords, utility companies and other third parties for the following housing related costs:

- **Rental application fee** charged by the landlord to all applicants;
• **Security deposit**, equal to or not more than 2 month’s rent;

• **Last month’s rent**, paid to landlord at the time security deposit and first month’s rent are paid. The amount must not exceed one month’s rent and is included in participant’s total rental assistance amount;

• **Moving costs**, including truck rental, hiring a moving company, and temporary storage fees. Storage fees may be up to 3 month’s rent, providing costs are not incurred until after program participation begins and before move-in. Moving costs may not include arrearage temporary storage fees;

• **Standard utility deposit** (gas, electric, water, sewer) required by the utility company for all customers;

• **Standard utility payments** (gas, electric, water, sewer) up to 24 months during any 3-year period, including up to 6 months of arrearages per service. Utility account must be in the name of a member of the client household or there is other verification of the household’s responsibility for the utilities.

• **Payment of utility arrearages** for a previous address require that the utility account be in the name of a member of the client household or other verification of the household’s responsibility for payment. Payment cannot exceed $1,500 and must have verification in the client’s file from the utility company confirming that, once payment is received, the utility company will provide utilities to the client. Staff are encouraged to assist clients in negotiating a payment plan or payment forgiveness for any amount exceeding the $1500. Payment of utility arrearages for Homelessness Prevention participants requires a current shut off notice.

Subgrantee may develop a written policy regarding to whom the landlord and utility companies will refund security and utility deposit payments. Any policy must be applied consistently for all program participants. Any deposit funds returned to subgrantee is program income and must be documented as match.

Financial assistance cannot be provided to a program participant who is receiving the same type of assistance through other public sources or to a program participant who has been provided with replacement housing payments under the URA, during the period of time covered by the URA payments. Financial assistance refers to: rental application fees, security deposits, last month’s rent, utility deposits, utility payments and moving costs.

3. **Short- and Medium-Term Rental Assistance**

A participant can be provided up to 24 months of rental assistance during any 3-year period. Rental assistance may include payment of rent arrearages for tenant or project based housing. Duration of rental assistance must minimally comply with program standards including:

• **Short-Term Assistance** is for up to 3 months’ rent;

• **Medium-Term Assistance** is more than 3 months, no more than 24 months; and
• **Payment of Arrearages** must be a one-time payment of up to 6 months’ rent, including any late fees on those arrears.

If arrears are owed to a previous landlord, these arrears may be paid, but only when there is documented evidence that payment of those arrears is necessary for the participant to obtain permanent housing and maintain stability in that housing.

Except for a one-time payment of rental arrears on the tenant's portion of the rental payment, rental assistance cannot be provided to a program participant who is receiving tenant-based rental assistance, or living in a housing unit receiving project-based rental assistance or operating assistance, through other public sources.

4. **Rental Agreement and Lease**

Short- and medium-term rental assistance requires both a rental assistance agreement between the subgrantee and landlord and a lease between the program participant and landlord. Subgrantees are required to make rental assistance payments only to a landlord with whom Subgrantee has entered into a rental assistance agreement. The rental assistance agreement sets out the terms under which rental assistance will be paid. A rental assistance agreement is a separate document from the rental lease. There is no requirement that the term of the lease coincide with the term of the rental assistance agreement as long as they are both in effect during the time ESG-funded rental assistance is provided. (The exception is that no current lease is needed for payment of rent arrears.)

A rental assistance agreement must set forth the terms under which rental assistance will be provided, including the following requirements:

- The landlord shall give the agency a copy of any notice to the program participant to vacate the housing unit, or any complaint used under state or local law to commence an eviction action against the program participant;
- Payment due date, grace period, and late payment penalty requirements will be the same as documented in the program participant’s lease;
- If the rental assistance is tenant-based or project-based;
- If the subgrantee incurs late payment penalties, it is the sole responsibility of the agency to pay those penalties, using non-ESG funds;
- If the subgrantee requires the program participant to pay a portion of the monthly rental cost, the amount of rent to be paid by each party;
- The amount to be paid by the subgrantee for payment of rent arrears, number of months covered, any other terms and conditions of the payment, and certification the program participant is eligible and landlord has provided sufficient evidence of the rent arrears and that payment of such arrears is necessary for the participant to obtain permanent housing and maintain stability in that housing.
Each program participant receiving rental assistance must have a legally binding, written lease for the rental unit, unless the assistance is solely to pay rent arrears. The lease must be between the landlord and program participant and signed by both parties. Where the assistance is solely for rental arrears, an oral agreement may be accepted in place of a written lease, if the agreement gives the program participant an enforceable leasehold interest under state law and the agreement and rent owed are sufficiently documented by the owner's financial records, rent ledgers, or canceled checks.

For program participants living in housing with project-based rental assistance, the lease must have an initial term of one year. Subgrantee must terminate the rental assistance agreement and provide no further rental assistance payments if: the program participant moves out of the leased housing unit; the lease terminates and is not renewed; or the program participant becomes ineligible to receive ESG rental assistance.

5. Rent Reasonableness Determination

Subgrantee must determine whether the gross rent of a particular unit is a reasonable rent in comparison to rent for other comparable unassisted units. To make this determination, subgrantee must consider 1) the location, quality, size, unit type, and age of the contract unit; and 2) any amenities, housing services, maintenance and utilities to be provided by the owner in accordance with the lease. The unit’s gross rent must be comparable to the rent reasonableness rent for the unit to be considered for rental assistance.

Subgrantee must determine the review method(s) they will use to establish the rent reasonableness standards for their area (e.g.; A list of comparable rents can be compiled by using a market study of rents charged for units of different sizes or by reviewing advertisements for comparable rental units). To learn how public housing authorities establish rent reasonableness for the Housing Choice Voucher program, review Chapter 9 of the HUD Housing Choice Voucher Program Guidebook. The link to the Guidebook is in the appendices of this manual.

Comparable rents vary over time with market modifications. Rent Reasonableness standards must be reviewed periodically and adjusted to align with these rent market changes. The Rent Reasonableness review completed for each unit must be documented in the client case file.

6. Fair Market Rent (FMR) Requirement

HUD establishes FMRs to determine rent ceilings for HUD-funded rental assistance programs. HUD publishes the FMR schedule annually for 530 metropolitan areas and 2,045 non-metropolitan county areas. The link to HUD’s FMR index is included in the appendices in this manual.

Gross rent for units in which ESG provides rental assistance must be the same or less than the FMR for that location. If subgrantee’s service area includes more than one county, subgrantee must use the appropriate FMR for the county in which the assisted rental unit is located. The
applicable FMR data should be copied and placed in the client file to document the FMR for that participant’s unit size and geographic area.

7. Calculating Gross Rent

Whether a household is seeking to maintain its current housing or relocate to another unit to avoid homelessness, or exiting homelessness into new permanent housing, the process for determining acceptable rent amounts is the same: the gross rent (rent plus appropriate utility allowance) must 1) be no greater than the Fair Market Rent set by HUD and 2) fit within the limitations resulting from a rent reasonableness analysis. The rent for the unit being assisted with program funds cannot exceed the lesser of the FMR or the rent reasonableness standard. If the gross rent for the unit exceeds either the rent reasonableness standard or FMR, the subgrantee is prohibited from using ESG funds for any portion of the rent, even if the household is willing and/or able to pay the difference.

Fair Market Rent and rent reasonableness requirements do not apply when a program participant receives only financial assistance or services. This includes rental application fees, security deposits, utility payments/deposits, moving costs, housing search and placement, housing stability case management, landlord-tenant mediation, legal services, and credit repair.

A utility allowance is a projection of the cost of utilities the client will pay monthly while renting their unit. Subgrantee must determine the amount of utility allowance to be used in the calculation of gross rent. The local public housing authority maintains a utility allowance chart which considers the number of bedrooms and types of utilities in a unit (e.g.; gas and/or electric, water, sewer, and trash). Any utilities included in the rent payment must not also be included in the utility allowance calculation. Telephone, cable or satellite television service, and internet service are not counted as utility costs.

To calculate the gross rent of a unit:

Total contract rent amount of the unit

+ Allowable* fees required for occupancy under the lease

+ Monthly utility allowance established by local public housing authority

= Gross Rent Amount

*excludes late fees and pet fees

Example:
A case manager wants to rapidly re-house a mother and son and has identified a 2-bedroom unit at a rent of $1,200 per month, not including utilities. The utility allowance for that size and type of unit is $150. Therefore, the gross rent is $1,350. A check of three similar units in the neighborhood reveals that the reasonable rent is $1,350. A check of three similar units in the neighborhood reveals that the reasonable rent is $1,400 for that area of the city. However, the FMR for the jurisdiction is $1,300. This means the household cannot be assisted with ESG in this unit because the gross rent exceeds the FMR.
Once a housing unit is determined to meet the FMR and rent reasonableness requirements, program funds may be used to pay for the actual utility costs. The utility allowance calculation is only used to determine whether the unit meets the FMR standard.

8. Eligibility Re-certification
Reassessments are required for homelessness prevention and rapid re-housing participants. Homelessness prevention reassessments are required every three months and must verify that a household continues to have an annual income at or below 30% of area median income and lacks the resources or support to retain or obtain appropriate permanent housing. Rapid re-housing assessments are required at least once per year to verify that a household’s income is at or below 30% area median income and they lack the resources and support networks to retain or obtain appropriate permanent housing. If a program participant informs the subgrantee of a change in income there is no immediate effect on the program participant’s eligibility and assistance can continue at the discretion of the subgrantee until the next required re-evaluation. There is no HUD or OCD requirement that the client notify the subgrantee of changes to income prior to the required re-evaluations, as specified above.

9. Housing Stability Case Management
ESG funds may be used to pay the cost of assessing, arranging, coordinating and monitoring the delivery of individualized housing stabilization services to a program participant already in permanent housing (not to exceed 24 months) or to assist a program participant to overcome immediate barriers to obtaining housing (not to exceed 30 days). Subgrantees are encouraged to provide case management to all clients receiving homelessness prevention and rapid re-housing services. Clients receiving short- and medium-term rental assistance are required to be case-managed and have a housing stability service plan. Case management includes the following services:

- Using a coordinated entry process (upon the CoC’s development or approval of this system);
- Conducting initial evaluation, including verification and documentation of eligibility;
- Developing, securing and coordinating services;
- Obtaining federal, state, and local benefits;
- Monitoring and evaluating participant’s progress in the program;
- Developing an individualized housing stability service plan; and
- Conducting re-evaluations of participant’s eligibility and types and amounts of assistance needed.
E. Homeless Management Information System (HMIS)

1. Reporting Requirements
ESG funded client and activity data must be entered into the HMIS (ServicePoint) or alternative database for clients who are victims of violence. Data entry and reporting expectations include:

- Timely and accurate data entry into the HMIS;
- Acquiring and documenting informed written consent from program participants;
- Protecting program participants’ confidentiality;
- Using the HMIS as a tool to analyze data to inform and improve the delivery of services.

2. Victim Services Data Collection
Victim service providers are prohibited from entering data in HMIS; however, they are required to maintain comparable databases of their own design which provide aggregate information and data consistent with HMIS data collection requirements. Projects serving survivors of domestic violence where the recipient is not a victim services provider are required to enter data in their HMIS.

F. Ineligible Activities and Assistance
Ineligible activities that cannot be funded with ESG include, but are not exclusive to:

- replacement of existing mainstream resources;
- payments made directly to program participants;
- payments on a mortgage or land contract;
- payment of rent for eligible individuals or families for the same period of time and for the same cost types being assisted through any other federal, state, or local housing subsidy program;
- payments on credit card bills or other consumer debt, including child support or garnishments;
- provision of cash assistance;
- payment of costs of discharge planning programs in mainstream institutions such as hospitals, nursing homes, jails, or prisons; and
- payment for religious activities (Note: While organizations that are religious or faith-based are eligible to receive ESG funds, religious activities must be conducted separately, in time and location, from ESG-funded activities and participation must be voluntary for program participants).
IV. Housing and Facility Standards

A. Occupancy Standards
Occupancy standards provide consistent criteria for determining the size of the permanent housing unit for which the household is eligible and thus, the amount of assistance to be provided.

Subgrantee may choose to use the occupancy guidelines set by the Housing Choice Voucher Program, 24 CFR 982 Subpart I: 982.401(d), or develop their own standards. Subgrantee must develop a written policy outlining their occupancy standards requirements and use those standards consistently.

There may be circumstances where it is not appropriate for two persons to share a bedroom. As examples, these occur when the household includes:

- Persons of different generations, persons of the opposite sex, and unrelated adults;
- A live-in care attendant who is not a member of the household; or
- Members with medical problems who need privacy or space for medical equipment.

B. Habitability Standards
All housing units supported with program funds must meet HUD Habitability Standards. Habitability Standards are different from the Housing Quality Standards (HQS) used for HOME and HOME TBA programs. Because the HQS criteria are more stringent than the Habitability Standards, subgrantee could use either standard for shelter or rental assistance funded with ESG. Housing also needs to be compliant with local housing codes relating to occupancy, health, and safety standards and the program must comply with the more stringent of the two.

1. Permanent Housing
Minimum habitability standards for permanent housing include requirements for:
- structure and materials;
- personal space and security;
- interior air quality;
- water supply;
- sanitary facilities;
- heating and cooling operating equipment;
- natural and electrically produced light;
- area for food preparation;
- safe and sanitary project maintenance; and
- fire safety.
For households moving into a new unit, the unit must meet habitability standards before the lease is signed and the household moves in. For households already residing in a unit, the unit must meet habitability standards before financial or rental assistance can be provided.

2. Shelters
In addition to established housing codes, habitability standards for shelters in which ESG funds are used for conversion, major rehabilitation or renovation, or shelter operations include requirements for the following:
- structure and materials;
- access to and within the shelter;
- personal space and security;
- interior air quality;
- water supply;
- sanitary facilities;
- heating and cooling operating equipment;
- natural and electrically produced light;
- area for food preparation;
- safe and sanitary facility maintenance; and
- fire safety/smoke detectors.

C. Lead-Based Paint Requirements
Federal lead-based paint requirements apply any time federal funds are used for housing assistance and the living space or unit was built prior to 1978. The Lead-Based Paint Poisoning Prevention Act (42 U.S.C. 4821-4846), the Residential Lead-Based Paint Hazard Reduction Act of 1992 (42 U.S.C. 4851-4856), and implementing regulations in 24 CFR part 35, subparts A, B, H, J, K, M and R apply to all shelters assisted with ESG funding and all housing occupied by program participants.

Subgrantee must provide the lead hazard information pamphlet to any resident who will be residing in a unit built before 1978. The tenant must receive the pamphlet before moving into the unit. If subgrantee can document the tenant received the pamphlet previously, subgrantee is not required to provide it again.

For units older than 1978 which will house one or more children under the age of 6, landlord and tenant must complete a Lead-Based Paint Disclosure form. The form describes any known current or previous lead-based paint hazards, and documents tenant’s receipt of records and the lead hazard information pamphlet. Additionally, a visual lead-based paint assessment must be completed by a person trained in this inspection process. The inspection may be completed in conjunction with the habitability inspection if the inspector is qualified. At Intake, it should be noted on the Application Form if there will be any child in the household younger than 6
years. This information should be provided to the habitability inspector prior to their examination of the proposed rental unit.

Essential service activities, such as, counseling, case management, street outreach, referrals to employment, etc., are exempt and excluded from the lead-based paint inspection requirements.
V. Client Confidentiality

A. General Requirements
All information about the applicant/client is confidential. Disclose information only for the purpose of determining program eligibility, providing benefits, or investigating possible violation of federal, state and local regulation(s) associated with ESG delivery and never in a setting where members of the public can hear the conversation.

Subgrantees must have policies and procedures that ensure all client information and records are secure and confidentially maintained. Subgrantees’ officers, employees and agents must be aware of and comply with subgrantees’ confidentiality policies and procedures.

B. Electronic Confidentiality
Electronic collection of client information requires procedures for ensuring confidentiality. The following guidelines apply to the use of a computer:

- The computer terminal(s) used must be located in a secure location, limiting access to only those persons who have a legitimate interest in and are responsible in viewing client records.
- The computer monitor must be cleared (or a screen saver activated) immediately after accessing a client record.
- The computer terminal must be on a “locked” mode or turned off if the terminal is unattended.
- Access to the HMIS program shall be given to authorized staff persons and only insofar as access is necessary for performing the work required for the ESG program.

C. Victims of Domestic Violence
Subgrantee must implement procedures to ensure confidentiality of records pertaining to any individual who is provided family violence prevention or treatment services. Victim information cannot be disclosed to any third party without consent of the victim.

Victim service providers are prohibited from entering data in HMIS; however, they are required to maintain comparable databases of their own design which provide aggregate information and data consistent with HMIS data collection requirements. Projects serving survivors of domestic violence where the recipient is not a victim services provider are required to enter data in their HMIS.

Subgrantee must instruct all staff that the address of a domestic violence provider’s shelter location will not be made public without permission of the provider.
D. Release of Information

Client information (including identifying the person is a client) should not be released without written authorization from the client. A Release of Information form must be completed by the applicant at the time of intake.

Client refusal to provide such authorization cannot be the basis for denying program services to otherwise eligible clients.

Release forms must be time-limited and specific as to with whom and what information will be shared.
VI. Termination, Grievance and Conflict of Interest Policies

A. Termination or Denial of Assistance

Subgrantee must have written denial, termination, and grievance policies and procedures. The policies and procedures should be readily available to program participants either in writing or by posting them in a public place. Copies and explanation of the policies and procedures be provided directly to any client when denial, termination or other action affects the client’s ability to receive assistance. The notice must provide the specific reason(s) for the action and provide a process the applicant can follow to request a review of the decision.

If subgrantee is terminating rental assistance to the program participant, they must immediately notify the landlord of the date rental assistance for their tenant will end.

Termination from assistance does not prevent subgrantee from providing further assistance, later, to the same household or individual if they are determined eligible for such assistance.

B. Grievance and Appeals Process

Subgrantee is required to have an established process for addressing client grievances for decisions, including termination or reduction of benefit, denial of benefit or other grievance. At a minimum, the process must include the following components:

- Informs the participant/applicant of the policy and documents participant/applicant acknowledgement of grievance procedure in client file;
- Informs the participant/applicant that they may contest any decision that denies (for any reason) or limits eligibility of participant/applicant and/or terminates or modifies any benefits;
- Allows any aggrieved person a minimum of thirty days within which to request an administrative review;
- Informs the applicant/participant of their right to present written or oral objections before a person other than the person (or a subordinate of that person) who made or approved the decision;
- Informs the applicant/participant and OCD in writing of the final determination and basis for the decision within ten days of the determination.

Any person or persons designated by subgrantee can complete the administrative review, other than the person who made or approved the decision under review or a subordinate of this person. OCD retains the right to require modification of any review or appeals process that in its determination does not meet basic principles for notification, instruction, time allowance, impartiality and access. Subgrantees must make accommodations for clients who have language or disability barriers that would prevent them from participating in the appeals process.
See Appendix 3: Shelter Network Grievance and Appeals Process for additional information on the termination and grievance policies and procedures.

C. Conflict of Interest

1. Organizational

The provision of any type or amount of ESG assistance may not be conditioned on an individual’s or household's acceptance or occupancy of emergency shelter or housing owned by subgrantee or an affiliated organization. A subgrantee is prohibited from conducting a participant’s intake assessment to determine program eligibility if the participant resides in housing where the subgrantee has ownership interest. Subgrantee would need to find another independent organization that is also an ESG grantee to do the intake assessment and ensure that all program participants are eligible even if the subgrantee has a waiver of the conflict of interest requirements. Conflict of interest waivers regarding rent assistance and rental agreement requirements can only be approved by HUD. If a subgrantee wishes to apply for a waiver, they should contact the OCD homeless program coordinator or manager for guidance in submission of a waiver request which must be approved by OCD who will then submit to HUD. See 24 CFR 576.404(a).

Subgrantee must keep records to show compliance with ESG program organizational conflicts-of-interest requirements.

2. Individual

For the procurement of goods and services, subgrantee must comply with the codes of conduct and conflict of interest requirements under 24 CFR 85.36 (for governments) or 24 CFR 84.42 (for private nonprofit organizations).

Persons for whom the Conflict of Interest requirements apply include any person who is an employee, agent, consultant, officer, or elected or appointed official of the subgrantee agency. No person who exercises or has exercised any functions or responsibilities with respect to activities assisted under the ESG program, or who is in a position to participate in a decision-making process or gain inside information with regard to activities assisted under the Program, may obtain a financial interest or benefit from an assisted activity; have a financial interest in any contract, subcontract, or agreement with respect to an assisted activity; or have a financial interest in the proceeds derived from an assisted activity, either for him or herself or for those with whom he or she has family or business ties, during his or her tenure or during the one-year period following his or her tenure.

Upon the written request of OCD, HUD may grant an exception to the provisions of this paragraph on a case-by-case basis. Subgrantees wishing an exception must submit requests to OCD for review and forwarding to HUD. There is no guarantee that an exception will be approved.
VII. Fair Housing

A. Affirmative Outreach
Subgrantee must communicate and make known that use of ESG funded facilities, assistance and services are available to all on a nondiscriminatory basis. All individuals, including transgender individuals and other individuals who do not identify with the sex they were assigned at birth, must receive equal access to program, benefits, services and accommodations in accordance with their gender identity without being subjected to intrusive questioning or being asked to provide documentation, in accordance with the HUD final rule entitled “Equal Access in Accordance with an Individual’s Gender Identity in Community Planning and Development Programs.”

Subgrantee must develop and implement affirmative outreach written procedures and communication tools and materials to inform persons without regard to race, color, ethnicity, religion, sex, gender, sexual orientation, age, national origin, familial status, or disability, how to obtain access to facilities and services. If it appears the procedures subgrantee intends to use to accomplish this will not reach persons of any particular race, color, religion, sex, gender, sexual orientation, age, national origin, familial status, or disability who may qualify for those activities and services, subgrantee must establish additional procedures to ensure those persons are made aware of assistance opportunities.

Reasonable accommodations for persons with disabilities must be available in order to ensure disabled participants have an equal opportunity to utilize housing, including shelters, and receive essential services. Greater levels of accessibility may be required for some shelters in compliance with The Americans with Disabilities Act.

B. Nondiscrimination
Subgrantee is required to comply with all state and federal statutes relating to nondiscrimination, including the Fair Housing Act, Section 504 of the Rehabilitation Act, Title VI of the Civil Rights Act, Title II of the Americans with Disabilities Act, and Title III of the American with Disabilities Act. Subgrantee may not take any of the following actions based on race, color, national origin, religion, gender, familial status, disability, marital status, source of income, sexual orientation, including gender identity, honorably discharged veterans/military status, and survivors of domestic violence:

- Refuse to rent housing or provide services
- Make housing or services unavailable
- Deny a dwelling or service
- Set different terms, conditions or privileges for rental of a dwelling or obtaining services
- Provide different housing services or facilities or different services
- Falsely deny that housing is available for inspection or rental or that services are available
- Deny anyone access to a facility or service.
VIII. Recordkeeping

A. Client File Documentation
Sufficient records must be established and maintained to enable OCD and HUD to determine whether ESG requirements are being met. Subgrantee must make sure any subrecipients assisting subgrantee with the ESG program also maintain appropriate and complete records.

Documentation of client eligibility and services received must be maintained in printed or electronically-saved client case files, including files for applicants found to be ineligible. File documentation will be the basis of OCD monitoring to ensure subgrantee is in compliance with program requirements and HUD regulations.

At the minimum, client files must contain the following, if applicable to subgrantee’s service to the program participant:

- Verification of use of coordinated entry;
- Signed Release of Information;
- Intake form and assessment of household needs;
- homeless or at risk of homelessness verification;
- Evidence applicant has no subsequent housing options and lacks sufficient resources to retain housing, but is not homeless;
- Rent Reasonableness documentation;
- Habitability Standards verification;
- Lead-based Paint visual assessment;
- Signed Lease Agreement;
- Signed Rental Assistance Agreement;
- Verification of client income and assets;
- Amount and type of essential emergency shelter services provided;
- Re-evaluations of eligibility;
- Housing Plan and housing assistance provided;
- Verification of outstanding rent arrears;
- Case notes;
- Evidence of referrals;
- Documentation of payments made on client’s behalf; and
- Written notice of program termination.
B. Electronic Files
If client file documents and signatures or policy documents are collected and maintained electronically, required documentation must be made available to OCD in paper form when requested.

C. Records Retention
Subgrantees shall retain all program records pertinent to client services and expenditures paid with ESG funds in a manner consistent with the requirements of state and federal law. Currently, program records including client files must be retained for five (5) years. Program records for major rehabilitation or conversion of emergency shelter buildings must be retained for at least ten (10) years from the date that ESG funds were first obligated. Fiscal records, which include books, documents, papers, plans, and agency records that document all program expenditures, must be retained for a minimum of six (6) years, or such longer period as may be required due to any audit, controversy or litigation arising out of, or relating to, program use.
VIII. Financial Management

A. Administration

Administration will be used for costs related to the planning and execution of the ESG activities. The total amount for administration will be 7.5 percent of the total allocation of ESG funding grant. Match funding for this activity will be provided under other ESG funded activities (i.e. Street Outreach, Emergency Shelter, Homeless Prevention and Rapid Re-housing Activities). Administrative dollars will be retained by the Office of Community Development, and match support for this activity will be provided by awarded agencies in conjunction with other homeless activities.

B. Match

Washington County ensures that 100 percent of the Emergency Solutions Grant received is matched with equal resources. Subgrantee must submit match documentation to OCD quarterly and provide a description of the nature of the reported matching expenses and a certification that the match funds were used for ESG-eligible expenses. In addition, at the annual monitoring, OCD will pull samples of match documentation for verification purposes. The match may be cash or an in-kind amount, but cannot be counted as satisfying the matching requirement of another federal grant. Currently, the subgrantee provides state government cash sources as match for the Washington County ESG program. Types of match that may be accepted include:

- Cash contributions expended for allowable costs including staff salaries and fringe benefits
- Noncash contributions
- Services provided by volunteers are matched at the current minimum wage salary unless the recipient can verify a higher rate of pay for current employees performing similar work
- Real property, equipment, goods or services that if the recipient had to pay for them with grant funds, the payments would have been indirect costs
- The value of donated goods and services such as clothing, food, diapers, haircuts, etc. The value placed should be consistent with 2 CFR 200, Uniform Administrative Requirements, Cost Principals, and Audit Requirements for Federal Awards, Final Guidance.
- Costs paid by program income provided the costs are eligible ESG costs that supplement the recipient’s ESG program.

All sources listed as match must meet these criteria:

- The matching contribution must be made after the date that HUD signed the ESG Grant Agreement;
- Cash contributions must be expended within the expenditure deadline in 576.203;
• Non-cash contributions must be made within the expenditure deadline in 576.203.
• Contributions used to match a previous ESG grant may not be used to match a subsequent ESG grant;
• Contributions that have been or will be counted as satisfying a match requirement of other federal funds may not be used as match for ESG funding;
• The matching funds must be used for ESG eligible clients and activities; and
• If ESG funds are used to satisfy matching requirements of another federal program, funding from that program cannot be used to satisfy the matching requirements of ESG.

C. Funds Disbursement

Subgrantee will be expected to fully obligate or expend ESG funds from a previous funding cycle before spending funds from a current funding cycle. OCD will review subgrantee’s ESG spending. Subgrantee must retain supporting documentation of all costs charged to the ESG grant and be able to provide evidence that grant funds were spent on allowable costs.

24 CFR 576.203(b) requires a recipient to draw down and expend funds not less than once during each quarter of the recipient’s program year. OCD schedules draw downs on a quarterly basis throughout the program year using a scheduling spread sheet. Quarterly draws will occur no later than 30 days after the end of the quarter.
IX. Monitoring

A. Process
OCD staff views monitoring not as a once-a-year or a periodic exercise, but as an ongoing process involving continuous communication and evaluation of financial records. Such a process involves frequent telephone/email contacts, written communications, analysis of reports and audits, and periodic meetings as needed. It is the responsibility of OCD staff to keep fully informed concerning sub-recipient’s compliance with program requirements and the extent to which technical assistance is needed. The overriding goal of monitoring is to determine compliance, prevent/identify deficiencies and design corrective actions to improve or reinforce Sponsor performance. As part of this process, OCD staff must be alert for fraud, waste and mismanagement or situations with potential for such abuse. Where possible, any identified deficiencies in need of corrective action should be handled through discussion, negotiation, or technical assistance in a manner that maximizes local discretion. Monitoring also provides opportunities to identify program participant accomplishments as well as successful management, implementation, and evaluation techniques that might be replicated by other Sponsors.

Through on-site and desk monitoring, the reviewer can determine whether the program participant’s performance meets program requirements and improve program participant performance by providing guidance and making recommendations. The specific purposes of monitoring are to:

- Validate the accuracy of information presented by the program participants;
- Follow-up on problems identified during the monitoring visit;
- Determine compliance for those activities where there is sufficient information to make eligibility determinations;
- Evaluate the reasonableness of judgments made for those activities that necessarily involve high levels of program participant judgment;
- Ascertain the Sponsor’s ability to ensure that activities carried out meet compliance requirements;
- Verify the accuracy of the program participant’s records; and,
- Identify apparent causes of any problem(s) and offer recommendations for corrective actions.

OCD will monitor subgrantee’s program annually. Fiscal monitoring will be conducted annually unless an earlier review is warranted. After the monitoring visit, OCD will provide subgrantee with a written monitoring report inclusive of any findings, concerns or comments. Subgrantee must provide timely corrective action to findings.
B. Subgrantee Monitoring of Subrecipients
Subgrantee shall perform onsite monitoring their subrecipients annually. Subgrantee must maintain and provide access to subrecipient written monitoring procedures and reports as requested by OCD.

C. Records Access
Subgrantee and its subrecipients shall permit OCD, HUD, and the duly authorized representatives of such entities access to, and the right to copy, all program client and fiscal records for such purposes as research, data collection, evaluations, monitoring, and auditing. At the sole discretion of OCD, access to records shall include the removing of records from subgrantee’s office. Access to records is not limited to the required retention period, but last as long as the records are retained.
Appendix 1: Applicable Rules and Regulations

All the following as may be amended from time to time:

1. 24 CFR 5 subpart F: Occupancy Requirements for Section 8 Project-Based Assistance
2. 24 CFR part 91: Consolidated Submissions for Community Planning and Development Programs
3. 24 CFR part 576: Emergency Solutions Grant Program
4. 24 CFR part 121: Homeless Management Information System (HMIS)
5. 24 CFR part 982: Fair Market Rent and Rent Reasonableness
6. HMIS Manual
8. This manual as a guideline for ESG program management.
9. Lead-Based Paint: http://www2.epa.gov/lead and 24 CFR part 35
11. Annual Median Income:
   • ESG program guidance
   • Federal regulations
   • Tools and technical assistance
   • Listserv opportunities
   • Frequently Asked Questions
14. CFRs cited are amended from time to time and can be found at: http://www.ecfr.gov/cgi-bin/text-idx?c=ecfr&tpl=%2Findex.tpl
15. OMBs cited are amended from time to time and can be found at: http://www.whitehouse.gov/omb/circulars_default

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Appendix 2: Income Eligibility Guidance

The requirements for determining whether a family is eligible for assistance, and the amount of rent the family will pay, requires the lead agency to project or estimate the annual income that the family expects to receive. Generally the agency must use current circumstances to anticipate income. Annual income is projected by annualizing current income. Income that may not last for a full 12 months (e.g. unemployment compensation) should be calculated assuming current circumstances will last a full 12 months. If changes occur later in the year, an interim recertification can be conducted to change the family’s rent. If information is available on changes expected to occur during the year, use that information to determine the total anticipated income from all known sources for the year.

Convert all income to an annual figure by multiplying the pay rate by the frequency of payment.

- Multiply hourly wages by the number of hours worked per year. Full-time employment (40 hours a week and no overtime) is 2,080 hours (40 hrs X 52 weeks = 2080 hours). (10 hours a week X 52 weeks = 520 hrs per year).
- Multiply weekly wages by 52.
- Multiply bi-weekly wages by 26.
- Multiply semi-monthly wages by 24.
- Multiply monthly wages by 12.
- Multiply daily wages by 260 (full time/no overtime).
- To convert monthly amount to weekly, divide by 4.3.
- Round up to the nearest dollar at .50 and above (except SS payments, which are always rounded down).

Calculating Unemployment Benefits:

- Multiply gross weekly benefit by 52 weeks, regardless of the number benefit weeks remaining; and
- When the family reports the benefits have ceased, complete an Interim Revision to adjust annual income.

Calculating Wages/Salary - Anticipated gross amounts prior to payroll deductions or garnishments, including:

- All employment sources;
- Overtime;
- Commissions;
- Bonuses
- Tips or other compensation for personal services;
- Projected pay increases/raises.
Irregular Income
Irregular income is defined as income received in an unpredictable or sporadic manner, such as income from seasonal employment, temporary work agencies, child support, or alimony. If the family has a history of irregular income, you may use the family’s past income history to determine how to project such income forward. When determining such income divide the year-to-date (YTD) total provided by the amount of actual weeks the total covers to receive an average weekly income. Multiply the weekly income amount by 52 (weeks).

Part 5 Definition of Income
The Part 5 definition of annual income is the gross amount of income of all adult household members that is anticipated to be received during the coming 12-month period. This definition sounds straightforward, but there are several specific issues related to the calculation of Part 5 annual income.

The words highlighted above are key parts of the following phrases, which are essential to understanding the requirements for calculating Part 5 annual income.

- **Gross amount.** For the types of income counted in the Part 5 definition, gross amounts (before any deductions have been taken) are used.
- **Income of all adult household members.** The Part 5 definition contains income "inclusions" (types of income to be counted) and "exclusions" (types of income that are not considered) for all adult members of a household.
- **Anticipated to be received.** Part 5 annual income is used to determine eligibility and the amount of Federal assistance a family can receive. A PJ must, therefore, use a household's expected ability to pay, not their past earnings, when estimating housing assistance needs.

Background on Using Part 5
The HOME Program previously required PJs to use only the Section 8 Program definition of annual income to determine the eligibility of applicants to their HOME programs.

The rules concerning Section 8 annual income were previously found at 24 CFR Part 813. However, Part 813 was removed from the Federal regulations on October 18, 1996. At the same time, 24 CFR Part 5 was published. Subpart F of Part 5 consolidated the requirements pertaining to income for many of HUD's programs, including Section 8.

Currently, the definition of annual income found at 24 CFR Part 5 is used by a variety of Federal programs, including:

- the HOME Investment Partnership Program,
- the Community Development Block Grant Program,
- the Section 8 Program,
- public housing programs, and
- the Low Income Housing Tax Credit Program.

Within each of these programs, the Part 5 definition of annual income can be used to determine program eligibility and, in some programs, the level of assistance the household will receive.

In some cases, two or more Federal programs may provide assistance to a single program or project at the local level. When this is the case, the PJ should be careful to choose a definition for income determinations that is permitted in all of the relevant Federal programs.

**CPD's Income Eligibility Calculator** is an interactive tool that assists in determining the income eligibility and assistance amounts for beneficiaries of CPD programs. Simply enter the requested data and this calculator will work behind the scenes to generate a summary of results for each beneficiary. You should then print out the summary and include it as part of the beneficiary's file:

I.  [https://www.onecpd.info/incomecalculator/](https://www.onecpd.info/incomecalculator/)

II. Whose Income to Count

Under the Part 5 definition of annual income, income from certain groups of people requires special consideration when calculating a household's annual income. Click on the key words below for more information on how to count the income of the following categories of people:

- **Minors** (age 17 and under)
- **Live-in aides**
- **Persons with disabilities**
- **Temporarily absent family members**
- **Permanently absent family members**
- **Adult students living away from home**

III. Types of Income to Count

A list of the Part 5 income "inclusions" and "exclusions" is published in the Code of Federal Regulations at 24 CFR 5.609. This list is periodically updated by HUD when changes are made to the Part 5 definition of annual income by the United States Congress.

Welfare assistance is generally counted in the Part 5 definition of annual income. Most PJs will therefore use the actual gross amount of welfare assistance the household receives in the calculation of "annual income". However, in certain "as-paid" localities a special calculation is required.
**Part 5 Inclusions** This table presents the Part 5 income inclusions as stated in the Code of Federal Regulations:

<table>
<thead>
<tr>
<th>General Category</th>
<th>Statement from 24 CFR 5.609 paragraph (b) (April 1, 2004)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Income from wages, salaries, tips, etc.</td>
<td>The full amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses, and other compensation for personal services.</td>
</tr>
<tr>
<td>2. Business Income</td>
<td>The net income from the operation of a business or profession. Expenditures for business expansion or amortization of capital indebtedness shall not be used as deductions in determining net income. An allowance for depreciation of assets used in a business or profession may be deducted, based on straight-line depreciation, as provided in Internal Revenue Service regulations. Any withdrawal of cash or assets from the operation of a business or profession will be included in income, except to the extent the withdrawal is reimbursement of cash or assets invested in the operation by the family.</td>
</tr>
<tr>
<td>3. Interest &amp; Dividend Income</td>
<td>Interest, dividends, and other net income of any kind from real or personal property. Expenditures for amortization of capital indebtedness shall not be used as deductions in determining net income. An allowance for depreciation is permitted only as authorized in number 2 (above). Any withdrawal of cash or assets from an investment will be included in income, except to the extent the withdrawal is reimbursement of cash or assets invested by the family. Where the family has net family assets in excess of $5,000, annual income shall include the greater of the actual income derived from all net family assets or a percentage of the value of such assets based on the current passbook savings rate, as determined by HUD.</td>
</tr>
<tr>
<td>4. Retirement &amp; Insurance Income</td>
<td>The full amount of periodic amounts received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits, and other similar types of periodic receipts, including a lump-sum amount or prospective monthly amounts for the delayed start of a periodic amount (except as provided in number 14 of Income Exclusions).</td>
</tr>
<tr>
<td>5. Unemployment &amp; Disability Income</td>
<td>Payments in lieu of earnings, such as unemployment and disability compensation, worker’s compensation, and severance pay (except as provided in number 3 of Income Exclusions).</td>
</tr>
<tr>
<td>6. Welfare Assistance</td>
<td>Welfare Assistance. Welfare assistance payments made under the Temporary Assistance for Needy Families (TANF) program are included in annual income:</td>
</tr>
<tr>
<td></td>
<td>• Qualify as assistance under the TANF program definition at 45 CFR</td>
</tr>
</tbody>
</table>
260.31; and
- Are otherwise excluded from the calculation of annual income per 24 CFR 5.609(c).

If the welfare assistance payment includes an amount specifically designated for shelter and utilities that is subject to adjustment by the welfare assistance agency in accordance with the actual cost of shelter and utilities, the amount of welfare assistance income to be included as income shall consist of:

- the amount of the allowance or grant exclusive of the amount specifically designated for shelter or utilities; **plus**
- the maximum amount that the welfare assistance agency could in fact allow the family for shelter and utilities. If the family's welfare assistance is reduced from the standard of need by applying a percentage, the amount calculated under 24 CFR 5.609 shall be the amount resulting from one application of the percentage.

<table>
<thead>
<tr>
<th>7. Alimony, Child Support, &amp; Gift Income</th>
<th>Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from organizations or from persons not residing in the dwelling.</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Armed Forces Income</td>
<td>All regular pay, special day and allowances of a member of the Armed Forces (except as provided in number 7 of Income Exclusions).</td>
</tr>
</tbody>
</table>
**Part 5 Exclusions** - This table presents the Part 5 income exclusions as stated in the Code of Federal Regulations:

<table>
<thead>
<tr>
<th>General Category</th>
<th>Statement from 24 CFR 5.609 paragraph (c) (April 1, 2004)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Income of Children</td>
<td>Income from employment of children (including foster children) under the age of 18 years.</td>
</tr>
<tr>
<td>2. Foster Care Payments</td>
<td>Payments received for the care of foster children or foster adults (usually persons with disabilities, unrelated to the tenant family, who are unable to live alone).</td>
</tr>
<tr>
<td>3. Inheritance and Insurance Income</td>
<td>Lump-sum additions to family assets, such as inheritances, insurance payments (including payments under health and accident insurance and worker's compensation), capital gains and settlement for personal or property losses (except as provided in number 5 of Income Inclusions).</td>
</tr>
<tr>
<td>4. Medical Expense Reimbursements</td>
<td>Amounts received by the family that are specifically for, or in reimbursement of, the cost of medical expenses for any family member.</td>
</tr>
<tr>
<td>5. Income of Live-in Aides</td>
<td>Income of a live-in aide (as defined in 24 CFR 5.403).</td>
</tr>
<tr>
<td>6. Disabled Persons</td>
<td>Certain increases in income of a disabled member of qualified families residing in HOME-assisted housing or receiving HOME tenant-based rental assistance (24 CFR 5.671(a)).</td>
</tr>
<tr>
<td>7. Student Financial Aid</td>
<td>The full amount of student financial assistance paid directly to the student or to the educational institution.</td>
</tr>
<tr>
<td>8. Armed Forces Hostile Fire Pay</td>
<td>The special pay to a family member serving in the Armed Forces who is exposed to hostile fire.</td>
</tr>
<tr>
<td>9. Self-Sufficiency Program Income</td>
<td>a. Amounts received under training programs funded by HUD.</td>
</tr>
<tr>
<td></td>
<td>b. Amounts received by a person with a disability that are disregarded for a limited time for purposes of Supplemental Security Income eligibility and benefits because they are set side for use under a Plan to Attain Self-Sufficiency (PASS).</td>
</tr>
<tr>
<td></td>
<td>c. Amounts received by a participant in other publicly assisted programs that are specifically for, or in reimbursement of, out-of-pocket expenses incurred (special equipment, clothing, transportation, childcare, etc.) and which are made solely to allow participation in a specific program.</td>
</tr>
<tr>
<td></td>
<td>d. Amounts received under a resident service stipend. A resident service stipend is a modest amount (not to exceed $200 per month) received by a resident for performing a service for the PHA or owner, on a part-time basis, that enhances the quality of life in the development. Such services may include, but are not limited to, fire patrol, hall monitoring, lawn maintenance,</td>
</tr>
</tbody>
</table>
resident initiatives coordination, and serving as a member of the PHA's governing board. No resident may receive more than one such stipend during the same period of time.

e. Incremental earnings and benefits resulting to any family member from participation in qualifying state or local employment training programs (including training not affiliated with a local government) and training of a family member as resident management staff. Amounts excluded by this provision must be received under employment training programs with clearly defined goals and objectives, and are excluded only for the period during which the family member participates in the employment training program.

<table>
<thead>
<tr>
<th>10. Gifts</th>
<th>Temporary, nonrecurring, or sporadic income (including gifts).</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Reparations</td>
<td>Reparation payments paid by a foreign government pursuant to claims filed under the laws of that government by persons who were persecuted during the Nazi era.</td>
</tr>
<tr>
<td>12. Income from Full-time Students</td>
<td>Earnings in excess of $480 for each full-time student 18 years old or older (excluding the head of household or spouse).</td>
</tr>
<tr>
<td>13. Adoption Assistance Payments</td>
<td>Adoption assistance payments in excess of $480 per adopted child.</td>
</tr>
<tr>
<td>14. Social Security &amp; SSI Income</td>
<td>Deferred periodic amounts from SSI and Social Security benefits that are received in a lump sum amount or in prospective monthly amounts.</td>
</tr>
<tr>
<td>15. Property Tax Refunds</td>
<td>Amounts received by the family in the form of refunds or rebates under state or local law for property taxes paid on the dwelling unit.</td>
</tr>
<tr>
<td>16. Home Care Assistance</td>
<td>Amounts paid by a state agency to a family with a member who has a developmental disability and is living at home to offset the cost of services and equipment needed to keep this developmentally disabled family member at home.</td>
</tr>
<tr>
<td>17. Other Federal Exclusions</td>
<td>Amounts specifically excluded by any other federal statute from consideration as income for purposes of determining eligibility or benefits under a category of assistance programs that includes assistance under any program to which the exclusions of 24 CFR 5.609(c) apply, including:</td>
</tr>
<tr>
<td></td>
<td>• The value of the allotment made under the Food Stamp Act of 1977;</td>
</tr>
<tr>
<td></td>
<td>• Payments received under the Domestic Volunteer Service Act of 1973 (employment through VISTA, Retired Senior Volunteer</td>
</tr>
</tbody>
</table>
• Payments received under the Alaskan Native Claims Settlement Act;
• Income derived from the disposition of funds to the Grand River Band of Ottawa Indians;
• Income derived from certain submarginal land of the United States that is held in trust for certain Indian tribes;
• Payments or allowances made under the Department of Health and Human Services' Low-Income Home Energy Assistance Program;
• Payments received under the Maine Indian Claims Settlement Act of 1980 (25 U.S.C. 1721);
• The first $2,000 of per capita shares received from judgment funds awarded by the Indian Claims Commission or the U.S. Claims Court and the interests of individual Indians in trust or restricted lands, including the first $2,000 per year of income received by individual Indians from funds derived from interests held in such trust or restricted lands;
• Amounts of scholarships funded under Title IV of the Higher Education Act of 1965, including awards under the Federal workstudy program or under the Bureau of Indian Affairs student assistance programs;
• Payments received from programs funded under Title V of the Older Americans Act of 1985 (Green Thumb, Senior Aides, OlderAmerican Community Service Employment Program);
• Payments received on or after January 1, 1989, from the Agent Orange Settlement Fund or any other fund established pursuant to the settlement in the In Re Agent Orange product liability litigation, M.D.L. No. 381 (E.D.N.Y.);
• Earned income tax credit refund payments received on or after January 1, 1991, including advanced earned income credit payments;
• The value of any child care provided or arranged (or any amount received as payment for such care or reimbursement for costs incurred for such care) under the Child Care and Development Block Grant Act of 1990;
• Payments received under programs funded in whole or in part under the Job Training Partnership Act (employment and training programs for Native Americans and migrant and seasonal farm workers, Job Corps, state job training programs and career intern programs, AmeriCorps);
• Payments by the Indian Claims Commission to the Confederated
| Tribes and Bands of Yakima Indian Nation or the Apache Tribe of Mescalero Reservation; | Allowances, earnings, and payments to AmeriCorps participants under the National and Community Service Act of 1990; |
| Any allowance paid under the provisions of 38 U.S.C. 1805 to a child suffering from spina bifida who is the child of a Vietnam veteran; | Any amount of crime victim compensation (under the Victims of Crime Act) received through crime victim assistance (or payment or reimbursement of the cost of such assistance) as determined under the Victims of Crime Act because of the commission of a crime against the applicant under the Victims of Crime Act; and |
| Allowances, earnings, and payments to individuals participating in programs under the Workforce Investment Act of 1998. |
IV. Assets Inclusions and Exclusions

In general terms, an asset is cash or no cash item that can be converted to cash. Note that when assets are included in the calculation of Part 5 annual income, it is the income earned from the asset - not the value of the asset - that is counted.

Inclusions

1. Cash held in savings accounts, checking accounts, safe deposit boxes, homes, etc. For savings accounts, use the current balance. For checking accounts, use the average 6-month balance.
2. Cash value of revocable trusts available to the applicant.
3. Equity in rental property or other capital investments. Equity is the estimated current market value of the asset less the unpaid balance on all loans secured by the asset and all reasonable costs (e.g., broker fees) that would be incurred in selling the asset. Under HOME, equity in the family's primary residence is not considered in the calculation of assets for owner-occupied rehabilitation projects.
4. Cash value of stocks, bonds, Treasury bills, certificates of deposit and money market accounts.
5. Individual retirement and Keogh accounts (even though withdrawal would result in a penalty).
6. Retirement and pension funds.
7. Cash value of life insurance policies available to the individual before death (e.g., surrender value of a whole life or universal life policy).
8. Personal property held as an investment such as gems, jewelry, coin collections, antique cars, etc.
9. Lump sum or one-time receipts, such as inheritances, capital gains, lottery winnings, victim's restitution, insurance settlements and other amounts not intended as periodic payments.
10. Mortgages or deeds of trust held by an applicant.

Exclusions

1. Necessary personal property, except as noted in number 8 of Inclusions, such as clothing, furniture, cars and vehicles specially equipped for persons with disabilities.
2. Interest in Indian trust lands.
3. Assets not effectively owned by the applicant. That is, when assets are held in an individual's name, but the assets and any income they earn accrue to the benefit of someone else who is not a member of the household and that other person is responsible for income taxes incurred on income generated by the asset.
4. Equity in cooperatives in which the family lives.
5. Assets not accessible to and that provide no income for the applicant.
6. Term life insurance policies (i.e., where there is no cash value).
7. Assets that are part of an active business. "Business" does not include rental of properties that are held as an investment and not a main occupation.
Appendix 3: Shelter Network Grievance and Appeals Process

Washington Co. Shelter Network Grievance and Appeal Process

Infractions Summary

Each agency or shelter program has written rules, guidelines, and policies and procedures that are specific to their respective agency. A written copy of the rules is provided to each participant by each agency at the time of intake. In the event that a behavior is being observed that could result in a rule infraction, program staff will initially give verbal warnings to the program participant. A verbal warning is intended to be a friendly reminder to correct a behavior that may result in a rule infraction. After a number of verbal warnings (specified at by the agency or facility), Staff will issue a written notice called an Infraction.

- Infractions are violations of shelter rules, guidelines, or policies and procedures.
  Infractions may lead to termination of shelter service.
- Infractions can be appealed using the Grievance and Appeal Process.
- If a Resident receives a specified number of infractions (determined by the agency or facility) they will be given a termination notice that requests that they leave the facility within 24 hours.

Termination Summary

There are two different types of Terminations:

1. Termination due to rule infractions – resulting from receiving the allotted number of infractions specified by the agency or facility.
   - Must leave by an agreed upon time the next day or after an appeal requesting an administrative review.
2. Immediate Termination – resulting from a safety concern
   - Must leave within a specified time frame of receiving notice. Resident may request administrative review of the decision for up to 30-days after being asked to leave.
**Termination Due to Rule Infractions**

Common reasons for infractions that may lead to termination of shelter service:

- Not passing room checks
- Not completing chores at all or on time
- Not participating in program requirements
- Disregard for staff instructions
- Not keeping children in line of site

**Immediate Termination of Shelter Service**

An Immediate Termination means that you must leave the shelter immediately and you will not be eligible for shelter for a specified period of time depending upon the agency or facility. Immediate Terminations are typically related but not limited to concerns pertaining to the safety of other residents, children and shelter staff.

The following are common reasons for immediate termination:

- Use of alcohol, marijuana or illegal drugs on or off the property;
- A resident found in possession of paraphernalia for use of drugs;
- Missing agency curfew or not returning to the facility;
- Violent, intimidating or harassing behavior, either physical, verbal or sexual, towards agency staff or residents of shelter;
- A resident found in possession of a weapon;
- Engaging in any illegal activity occurring on or off the property;
- Felony arrest or incarceration.

**Infractions Appeal Process**

At most agencies or facilities you have the right to appeal individual infractions that may result in termination of shelter service. You are encouraged to develop open dialogue with shelter staff about infractions, so as to avoid possible termination of shelter services. If your shelter stay and service is terminated as a result of accumulated infractions, you have the right to appeal termination of shelter service at the time of termination. If you are allowed to remain in the facility during the appeal process, you must continue to follow facility rules.
• To appeal an infraction you must:
  • Submit a written dated and signed appeal to the immediate Supervisor. The Supervisor will review the appeal when submitted and make a decision.
  • If you are not satisfied with the Supervisor’s decision, you may resubmit your appeal to the Program Manager.
  • If you are not satisfied with the Manager’s decision, you can submit your appeal within 30-days at the Director level. The decision of the Director is final.

Termination of Shelter Services

Grievance and Appeals Process

Each program has a policy of fair and unbiased treatment of our participants. We do not discriminate on the basis of age, race, color, national origin, religion, gender, familial status, disability, marital status, source of income, sexual orientation, gender identity, veteran/military status, or survivors of domestic violence.

A grievance is defined as a formal objection or complaint made on the basis of something that a program participant feels is unfair. You have the right to present written or oral objections before a person other than the person who made the decision that is affecting you. You may also contest any decision that denies or limits your eligibility for services. If you are seeking resolution to a complaint regarding staff, program plans, or termination of program services, you may have 30-days to initiate the following Grievance and Appeals Process:

• Discuss the complaint with the staff person involved or with your case manager.
• If you are not satisfied that your complaint has been resolved, or if you cannot discuss the complaint with that person, you may submit your dated and signed concern in writing to the appropriate Supervisor or Manager, depending upon the program. You may also request the option to present your complaint orally. If the program does not have a Supervisor or Manager, continue to the next appropriate staffing level at the respective Shelter Network provider.
• If you are not satisfied that your complaint has been resolved, you may submit the dated and signed concern in writing to the Program Director. You may also request the option to present your complaint orally. The Program Director will respond to you in writing.
• Your final option is to file a written request for administrative review with either the Board of Directors or the Executive Director, depending upon the Shelter Network program. The Board of Directors or the Executive Director will issue a written decision, which will be final.
• The Shelter Network program is required to notify the funder of all participant grievances or requests for administrative reviews, as well as of the final determination and basis for that decision.

<table>
<thead>
<tr>
<th>Shelter</th>
<th>Appeal Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Community Action</strong></td>
<td>1. Staff member involved</td>
</tr>
<tr>
<td>Hillsboro Family Shelter</td>
<td>2. Shelter Supervisor</td>
</tr>
<tr>
<td></td>
<td>3. Housing &amp; Homeless Services Manager</td>
</tr>
<tr>
<td></td>
<td>4. Program Director</td>
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<tr>
<td></td>
<td>5. Executive Director</td>
</tr>
<tr>
<td>Good Neighbor Center</td>
<td>1. Executive Director</td>
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<tr>
<td></td>
<td>2. Board of Directors</td>
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<tr>
<td>Family Promise</td>
<td>1. Executive Director</td>
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<tr>
<td></td>
<td>2. Board of Directors</td>
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<tr>
<td>DVRC</td>
<td>1. Program Director</td>
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<tr>
<td></td>
<td>2. Executive Director</td>
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<td></td>
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</tr>
<tr>
<td>Good Neighbor Center</td>
<td>1. Case Manager</td>
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<td></td>
<td>2. Executive Director</td>
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<tr>
<td></td>
<td>3. Board of Directors</td>
</tr>
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<td>Family Promise</td>
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</tr>
<tr>
<td></td>
<td>2. Board of Directors</td>
</tr>
<tr>
<td>DVRC</td>
<td>1. Staff member involved/Case Worker</td>
</tr>
<tr>
<td></td>
<td>2. Program Director</td>
</tr>
<tr>
<td></td>
<td>3. Executive Director</td>
</tr>
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<td></td>
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