



Portland – Gresham – Multnomah County Continuum-of-Care (COC): Systems Performance Monitoring & Reporting Plan

PREPARED BY:

A HOME FOR EVERYONE (AHFE)

DATA OUTCOMES AND EVALUATION COMMITTEE (DOE)

APPROVED BY:

A HOME FOR EVERYONE COORDINATING BOARD

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Introduction

The Cities of Portland and Gresham, Multnomah County, and the local housing authority (Home Forward) developed a collaborative initiative called **A Home for Everyone (AHFE) Continuum of Care (CoC)** to combat homelessness in Portland, Gresham, and Multnomah County. The AHFE Coordinating Board created several workgroups (housing, income and benefits, health, safety off the streets, and veterans) who developed various action plans to reduce homelessness. These plans and recommendations have been approved by the Executive Committee and they have substantially influenced how budgets are allocated in the FY 2015-16 and beyond.

With substantial new funding and programs comes a responsibility to robustly evaluate performance and outcomes. The first step in evaluating the performances of AHFE CoC is a system performance monitoring plan that will collect and report various system level outputs and outcomes.

Overview of the System Performance Monitoring Plan

The AHFE community realizes the need to evaluate outcomes and impact on a system level, including the need for a performance management plan that will track and evaluate the collaborative efforts on reducing homelessness in Portland, Gresham, and Multnomah County.

Existing programs and jurisdictions have consistently monitored their own outcomes. However, there has been no previous effort to measure the overall impact of the regional system to reduce homelessness. System performance measurement is a central component of each community's efforts to improve their homeless response systems and effectively use their resources to prevent and end homelessness.

This document outlines the AHFE Data Outcomes and Evaluation Committee's plan to develop, implement, and monitor system-wide performance. The AHFE Data Outcomes and Evaluation (DOE) Committee has developed this monitoring plan with input from jurisdictional staff and committee members.

Plan Development

The monitoringⁱ plan was guided by the collaborative goal of A Home for Everyone to improve the way people experiencing homelessness are served by:

- Prioritizing vulnerable populations
- Promoting racial and ethnic justice
- Holding the programs funded by our local government accountable and using data to make decisions
- Engaging and involving the community
- Strengthening system capacity and leveraging more opportunities

A successful system-wide monitoring plan will hinge upon common definitions and standard measurement of agreed-upon core outcomes. Therefore, this document recommends a set of core

measures, which have been reviewed and standardized in consultation with various data users. The plan also outlines a mechanism for data collection, analysis, and reporting, including a delineation of data collection, analysis, and reporting tasks and responsibilities among AHFE staff.

The current monitoring plan focuses on system-level outputs and outcomes only. It does not include funding, personnel, equipment, supplies or infrastructure data. Also not included are partnerships, policy advice and dialogue, advocacy, and coordination.

System Performance and Other Measures

System performance measurement is a central component of each community’s efforts to improve their homeless response systems and effectively use their resources to prevent and end homelessness in their area. The following measures have been selected based on Hearth objectives and community identified criteria. These various performance measures and other important indicators have been finalized in consultation with major stakeholders, in particular DOE members representing various local government agencies and “Data In and Management Committee” members representing service providers.

a. HUD System Performance Measures (New)

In July 2015, HUD announced a new set of performance measures that CoCs must track and report. Each community is expected by HUD to adopt and incorporate system performance measurement as a regular part of the CoC’s operation. HUD will use these measures as selection criteria for the future CoC Program Competition, but they will also provide a wealth of information for the current state of the community’s homeless response system. These performance measures are interrelated and, when analyzed relative to each other, should provide a more complete picture of system performance.

HUD expects HMIS software vendors to have completed programming of system performance reports for these measures in HMIS by February 2016. For CoCs to accurately assess their progress using these measures, they must ensure that their data are as complete and accurate as possible, from data collection to reporting.

These are the main HUD measures which will be adopted by the CoC for monitoring and reporting with minor modifications:

Abbreviations used in the description of each performance measures on subsequent tables.

Abbreviation	Project Types
ES	Emergency Shelter
TH	Transitional Housing
PH-RRH	PH – Rapid Re-housing
PH-PSH	PH – Permanent Supportive Housing
PH	Permanent Housing
SO	Street Outreach
SSO	Services Only
HP	Homelessness Prevention

Source: 2014 HMIS Data Dictionary

1. Measure HUD 1: Length of Time Persons Remain Homeless

Desired Outcome	Reduction in the average and median length of time persons remain homeless
Metrics (a and b)	Change in the average and median length of time persons are homeless in ES and SH (a) or ES, SH and TH (b) projects
Client Universe	Persons... <ul style="list-style-type: none"> - In ES and SH project types (a) - In ES, SH, and TH project types (b) - During the current reporting period
Calculation	<ol style="list-style-type: none"> 1. Calculate the number of days each person in the client universe (i.e. persons in ES and SH (a) or in ES, SH, and TH (b) during the reporting period) was homeless 2. Calculate average and median of the client universe <p>Average = Total days divided by the total persons homeless during the reporting period</p>
Source	HMIS

2. Measure HUD 2: The Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness

Desired Outcome	Reduction in percent of persons who return to homelessness
Metrics (a and b)	This measures clients who exited SO, ES, SH, TH, or PH to a permanent housing destination in the data 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 system for up to two years after initial exit.
Client Universe	Persons... <ul style="list-style-type: none"> - In ES, SH, TH and any PH project types - Who exited (i.e., system leavers) to permanent housing destinations - During the previous reporting period
Calculation	<ol style="list-style-type: none"> 1. Add the number of persons in the client universe 2. Of this client universe, add those persons who were also recorded in SO, ES, SH, and TH (a) or SO, ES, SH, TH, and all PH projects (b) in HMIS at 6, 12, or 24 months after their date of exit to permanent housing destinations 3. Divide the total from step 2 by the total from step 1 (i.e., client universe) to calculate the percent of persons who return to homelessness within 6, 12, and 24 months respectively
Source	HMIS

3. Measure HUD 3: Number of Homeless Persons

Desired Outcome	Reduction in percent of persons who are homeless
Metrics (a and b)	<ol style="list-style-type: none"> a) Change in Point-In-Time (PIT) counts of sheltered and unsheltered homeless persons b) Change in annual counts of sheltered homeless persons in HMIS
Client Universe	<ol style="list-style-type: none"> a) Persons... <ul style="list-style-type: none"> - Counted as sheltered and unsheltered homeless persons - Conducted during the reporting period b) Persons... <ul style="list-style-type: none"> - In ES, SH, and TH project types - During the reporting period
Calculation	<ol style="list-style-type: none"> 1. Using the PIT date, add the number of persons in the client universe 2. Using HMIS data

	<ul style="list-style-type: none"> - Add the number of persons in the client universe by project type - Add the overall unduplicated number of people in the client universe
Source	PIT and HMIS

4. Measure HUD 4: Employment and Income Growth for Homeless Persons in CoC Program-funded Projects

Desired Outcome	Increase in the percent of adults who gain or increase employment on non-employment cash income over time
Metrics (a, b, c, d, e, and f)	<ul style="list-style-type: none"> a) Change in employment income during the reporting period for system stayers b) Change in non-employment cash income during the reporting period for system stayers c) Change in total cash income during the reporting period for system stayers d) Change in employment income during the reporting period for system leavers e) Change in non-employment cash income during the reporting period for system leavers f) Change in total cash income during the reporting period for system leavers
Client Universe	<p>Adults...</p> <ul style="list-style-type: none"> - In CoC Program-funded SH, TH, PH-RRH, and PH-PSH project types - Who have been in HMIS for at least a year and are still in the system at the end of the reporting period (Metrics 'a' to 'c') - Who exited (i.e., system leavers) (Metrics 'd' to 'e') - During the reporting period
Calculation	<ol style="list-style-type: none"> 1. Using HMIS data, add the number of adults in the client universe 2. Of this client universe, add the numbers of adults who gained or increase income by various types during the reporting period 3. Divide the total from step 2 by the total from step 1 to calculate the percent of persons who increase or gain in income
Source	HMIS

5. Measure HUD 5: Reduction in the Number of Persons who Become Homeless for the First Time

Desired Outcome	Reduction in the number of persons who become homeless for the first time
Metrics (a and b)	<ul style="list-style-type: none"> a) Change in the number of homeless persons in ES, SH, and TH projects with no prior enrollment in HMIS b) Change in the number of persons in ES, SH, TH, and PH projects with no prior enrollments in HMIS
Client Universe	<ul style="list-style-type: none"> a) Persons... <ul style="list-style-type: none"> - In ES, SH, and TH project types - Who entered during the current reporting period b) Persons... <ul style="list-style-type: none"> - In ES, SH, TH, and any PH project types - Who entered during the current reporting period
Calculation	<ol style="list-style-type: none"> 1. Using HMIS data, add the number of persons in the client universe 2. Using HMIS data, calculate the number of persons who were also recorded in ES, SH, and TH projects in HMIS 24 months prior to their entry during the reporting year (i.e., those who were homeless) (a) 3. Using HMIS data, calculate the number of persons who were also recorded in ES, SH, TH, and all PH projects in HMIS 24 months prior to their entry during the

	reporting year (i.e., those who were homeless) (b) 4. Subtract the total from step 2 by the total from step 1 (i.e., client universe) to calculate the number of persons experiencing homelessness for the first time.
Source	HMIS

6. Measure HUD 7: Successful Placement from Street Outreach and Successful Placement in or Retention of Permanent Housing

Desired Outcomes (a and b)	a) Increase in the percent of persons who exit to an ES, SH, TH, or permanent housing destination from Street Outreach b) Increase in the percent of persons who exit to or retain permanent housing
Metrics (a and b)	a) Change in placements to permanent housing destinations, temporary destinations (except for a place not meant for human habitation), and some institutional destinations b) - Change in exits to permanent housing destinations - Change in exits to or retention of permanent housing
Client Universe	a) Persons... - In SO project types, who exit from SO - During the current reporting period b1) Persons... - In ES, SH, TH, and PH-RRH project types - Who exited (i.e., system leavers) - During the current reporting period b2) Persons... - In all PH projects except PH-RRH - During the current reporting period
Calculation	a) 1. Using HMIS data, add the number of persons in the client universe (i.e., persons who exited from an SO project during the current reporting period) 2. Of the client universe, add the number of persons who exited to permanent destinations, temporary destinations (except for a place not meant for human habitation), and some institutional destinations during the reporting period 3. Divide the total from step 2 by the total from step 1 (i.e., client universe) to calculate the percent of successful exits from SO b1) 1. Using HMIS data, add the client universe 2. Of the client universe, add up those persons in ES, SH, TH, and PH-RRH projects who exited to permanent destinations during the current reporting period 3. Divide the total from step 2 by the total from step 1 to calculate the percent of successful exits to permanent housing destinations b2) 1. Using HMIS data, add the client universe 2. Of the client universe, add up those persons who remained in all PH projects except PH-RRH and exited to permanent housing destinations during the current reporting period 3. Divide the total from step 2 by the total from step 1 to calculate the percent of successful exits to or retention of permanent housing
Source	HMIS

b. Local AHFE Measures

In addition to the measures above, HUD encourages communities to develop additional system performance measures that the communities believe will inform their decisions to better assist people affected by homelessness in their area. The Data Outcomes and Evaluation Committee has come up with the following system measures after intensive data alignment and collaboration meetings with various jurisdictional staff. The committee has finalized the following measures, which include versions of measures that have historically been collected by the Portland Housing Bureau and/or Multnomah County.

1. Measure AHFE 1: Total Number of Homeless Persons Placed in Permanent Housing

Desired Outcome	Increase in the number of Permanent Housing Placements
Metrics	Placements (entries) into any PH project type
Client Universe	a) Persons... <ul style="list-style-type: none"> In any PH project Who entered during current reporting period b) Persons... <ul style="list-style-type: none"> In SO, ES, and TH project types Who exited to a permanent destination
Calculation	1. Using HMIS data, add the number of persons in the client universe 2. Unduplicate, retaining most recent activity during current reporting period Entry into PH project is the base number and add any additional clients without a project entry, using the most recent Exit destination.
Source	HMIS

2. Measure AHFE 2: Number of Persons Prevented from Becoming Homeless

Desired Outcome	Prevent homelessness with Homeless Prevention
Metrics	Placements (entries) into any "Prevention" project type
Client Universe	a) Persons... <ul style="list-style-type: none"> In any Prevention project Who entered during current reporting period
Calculation	1. Using HMIS data, add the number of persons in the client universe 2. Unduplicate, retaining most recent activity during current reporting period.
Source	HMIS

3. Measure AHFE 3: Emergency Shelter Usage

Desired Outcome	Reduce average and median lengths of stay in Shelter
Metrics	Number of persons staying in shelter The average length of time spent in shelter And exit destinations (homeless, transitional, and permanent)
Client Universe	b) Persons... <ul style="list-style-type: none"> In any ES project
Calculation	1. Using HMIS data, add the number of persons in the client universe 2. Add all shelter stays length of stay (cumulative for reporting period unless the stay was transacted in a single transaction in which case the full LOS would be reported)
Source	HMIS

4. Measure AHFE 4: Retention Rate of Person Placed in Permanent Housing at 12 months after Exit

Desired Outcome	Increase housing retention rates
Metrics	Number of persons exiting any PH project type 12 months prior to reporting period. Did they retain permanent housing?
Client Universe	a) Persons... <ul style="list-style-type: none"> Who exited any PH project type 12 months prior to reporting period Who have Housing outcomes data for current reporting period
Calculation	1. For each client identify the Exit date, adding 365.25 days for the “Due” date 2. Count clients with housing outcomes data collected and were contacted 3. Count clients with confirmation they maintained housing 12 month post exit 4. Retention is calculated #3/#1 and #2/#1
Source	HMIS

5. Measure AHFE 5: Data Quality/Data Completeness

Desired Outcome	Statistically reliable reporting with complete data
Metrics	HUD Universal Data Elements (UDEs)
Client Universe	a) Persons... <ul style="list-style-type: none"> Actively engaged in any project
Calculation	1. Completed HUD UDEs / Total client in project
Source	HMIS

6. Measure AHFE 6: Bed Occupancy Rate

Desired Outcome	Utilization of ES beds including seasonal and over-flow beds
Metrics	HUD Universal Data Elements (UDEs)
Client Universe	a) Persons... <ul style="list-style-type: none"> In any ES project type during current reporting period b) Beds... <ul style="list-style-type: none"> Bed nights available during current reporting period
Calculation	1. Persons/Beds available Available beds for reporting period will be calculated based on year-round equivalent calculations
Source	HMIS

c. Equity Indicator(s)

Although data collected and reported can be disaggregated by race and ethnicity, there was a general consensus among the AHFE Coordinating Board members and the DOE Committee members that additional equity indicators or analysis were needed. There is a disproportionate representation of people of color (POC) among the homeless in the CoC as well as disparity in the provision of services and outcomes. The DOE Committee has identified a Disparity Ratio (DR) as a means for measuring the equity of service provision and outcomes and presenting this information in a way that will be helpful for decision-makers. The disparity ratio is calculated by dividing the measure (homelessness rate, placement and/or retention rates, etc.) for each racial and ethnic group by the measure for Non-Hispanic White (NHW) group, which will serve as comparison and reference point. Some of the disparity or equity ratios identified are as follows:

1. Average time homeless for POC/Average time homeless for NHW
2. Rate of homelessness for POC/Rate of homelessness for NHW
3. Rate of new homelessness for POC/Rate of new homelessness for NHW
4. Placement rate POC/Placement Rate NHW
 - a. Where placement rate = proportion of placements for each group (POC, NHW)/that group’s proportion of the total homeless population
5. Retention Rate POC/Placement Rate NHW
6. Average length of stay for POC/Average length of stay for NHW

d. Basic Demographics Data: Services Accessed and Permanent Housing Placements

In addition to above system performance measures, additional service access and permanent housing placement data are available through various existing HMIS reports. They can be broken down by various household types and subpopulations as well as in an aggregate form.

#	Data Dimensions	Additional Descriptions	Source
1	# Individuals		HMIS
2	Households types		HMIS
3	Race and ethnicity (including inclusive categories)		HMIS
4	Gender		HMIS
5	Age		HMIS
6	People with disabilities		HMIS
7	Veterans		HMIS
8	Chronic homelessness		HMIS

Special Note:

Victim service providers are prohibited from using an HMIS. The Domestic Violence Service Providers in Portland and Multnomah County use our comparable database. Information cannot be unduplicated across victim service providers nor against the comparable database providers and HMIS service providers. Reporting for both HMIS and the comparable database (locally called the Comp Site) can be run on each site and reported either separately or added together manually to reflect a quasi-aggregate report.

e. Contextual Metrics

These additional indicators will also be collected and reported to provide contextual information for the program outputs and outcomes. Contextual metrics will also provide narrative for data analysis and reporting.

#	Indicators	Additional Descriptions	Source
1	Poverty rate	Annual	2014 ACS 5-YR
2	Rental vacancy rate	Bi-annual	Multi-Family Apartments
3	Rental cost burdened households	Annual	2014 ACS 5-YR
4	Unemployment rate	Quarterly	Oregon DOE
5	Number of uninsured (health)	Annual	2014 ACS 5-YR

Data Collection and Report Preparation

The following data sources have been identified for collecting the aforementioned system performance measures and other metrics (both outcomes and contextual).

- a) The Homeless Management Information System (HMIS) is the community-wide data collection software that captures client level information over time on the characteristics and service needs of people experiencing homelessness. The HMIS database provides significant opportunities to improve access to and delivery of services while strengthening community planning, program monitoring, and resource allocation. For HMIS to be an effective tool, information must be entered routinely and accurately by agencies.
- b) The Point-In-Time Data (PIT) is a biannually conducted one-time community census of sheltered and unsheltered homeless population. In the Multnomah County, Portland, and Gresham CoC, the count of unsheltered homeless population is done every other year. The PIT data show a snapshot of homelessness in the community.
- c) The Annual Performance Report (APR) is a HUD reporting tool used to track program progress and accomplishments. The APR is an effective management tool for homeless housing and service providers to evaluate a number of issues (such as demographics, program design, and service needs). Because the APR utilizes the same report format for all CoC projects, it allows for fair comparisons and reliable information.
- d) The System Performance Measures Report (SPMR) is a new HUD reporting tool to track the system level performance measures discussed above. HUD will be using this report increasingly for HUD's competitive process for homeless assistance funding.
- e) The Department of Veterans Data (Veteran's Administration) provides supplemental data about veterans and their placement in housing.
- f) Other Data Sources
 - a. Administrative Data (budget, program costs, and personnel, etc.)
 - b. Census, BLS, etc.

The data will be collected from the above data sources quarterly where and when available. The PIT and a few contextual data will be collected on an annual or biannual basis.

The data collected will be processed by AHFE staff and reported after vetting with the AHFE DOE committee. Reporting will be considered as an integral part of the monitoring process, where essential information is provided in a systematic and timely manner at periodic intervals.

Monitoring Report

The monitoring report, which will include the above measures, will be reported to the AHFE Coordinating Board on a quarterly basis. The report will include a listing of summary measures and brief analysis of data. When available, the report will also include narrative discussing the measures and trends. The first monitoring report will be ready after the HMIS software vendors complete programming of system performance reports in HMIS and their testing by our Data Outcomes and Evaluation Committee in May 2016.

a) Reporting Format

Data will be reported in the following formats: paper, Excel spreadsheet, and a dashboard presentation using Tableau. The dashboard will focus on a few select measures from the

list above; these will be identified by the AHFE DOE committee after consulting with stakeholders and the board.

b) Timeline

The quarterly reports will be submitted within the first month of the following quarter. The quarterly reporting will allow for “rolling up” the data on an annual basis as necessary, whether it is calendar year or fiscal year (state or federal).

Calendar Year (January – December)	City/County FY (July – June)	Federal FY (October – September)
Q1 January, February, March		
Q2 April, May, June		
Q3 July, August, September	Q1 July, August, September	
Q4 October, November, December	Q2 October, November, December	Q1 October, November, December
(YR2) Q1 January, February, March	Q3 January, February, March	Q2 January, February, March
(YR2) Q2 April, May, June	Q4 April, May, June	Q3 April, May, June
(YR2) Q3 July, August, September	(YR 2) Q1 July, August, September	Q4 July, August, September
(YR2) Q4 October, November, December	(YR2) Q2 October, November, December	(YR2) Q1 October, November, December

Adoption of the Current Monitoring Plan

The current monitoring plan when finalized by the AHFE Data Outcomes and Evaluation committee will be submitted to the AHFE Coordinating Board at the March 2, 2016 meeting for adoption.

Periodic Plan Review and Evaluation

A review of the monitoring plan will be carried out by the AHFE Data Outcomes and Evaluation Committee at least on an annual basis. Even when there is no need to alter the monitoring plan, that decision and the date will be recorded in the monitoring plan. Also, the evaluation will include the following important part of the monitoring process: a) quality of measures, b) resource constraints, and c) staff and agency burden.

ⁱ Monitoring is an ongoing process that assesses the quality of a CoC’s and service providers’ performance over a period of time. Monitoring provides information about CoC, service providers, and the clients that they serve which is critical for making informed judgments about program effectiveness and management efficiency. HUD also monitors CoCs and recipients to make sure that the programs are carried out efficiently and effectively. Thus, monitoring is also a HUD requirement. Monitoring also provides a basis for developing consistent data for yearly and multi-yearly evaluation, which is a selective exercise that attempts to systematically and objectively assess progress towards the achievement of an outcome.