

Before Starting the CoC Application

The CoC Consolidated Application consists of three parts, the CoC Application, the CoC Priority Listing, and all the CoC's project applications that were either approved and ranked, or rejected. All three must be submitted for the CoC Consolidated Application to be considered complete.

The Collaborative Applicant is responsible for reviewing the following:

1. The FY 2018 CoC Program Competition Notice of Funding Available (NOFA) for specific application and program requirements.
2. The FY 2018 CoC Application Detailed Instructions which provide additional information and guidance for completing the application.
3. All information provided to ensure it is correct and current.
4. Responses provided by project applicants in their Project Applications.
5. The application to ensure all documentation, including attachment are provided.
6. Questions marked with an asterisk (*), which are mandatory and require a response.

1A. Continuum of Care (CoC) Identification

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1A-1. CoC Name and Number: PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

1A-2. Collaborative Applicant Name: County of Montgomery, Pennsylvania

1A-3. CoC Designation: CA

1A-4. HMIS Lead: County of Montgomery, Pennsylvania

1B. Continuum of Care (CoC) Engagement

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1B-1. CoC Meeting Participants. For the period from May 1, 2017 to April 30, 2018, using the list below, applicant must: (1) select organizations and persons that participate in CoC meetings; and (2) indicate whether the organizations and persons vote, including selecting CoC Board members.

Organization/Person Categories	Participates in CoC Meetings	Votes, including selecting CoC Board Members
Local Government Staff/Officials	Yes	Yes
CDBG/HOME/ESG Entitlement Jurisdiction	Yes	Yes
Law Enforcement	Yes	Yes
Local Jail(s)	Yes	No
Hospital(s)	Yes	Yes
EMS/Crisis Response Team(s)	No	No
Mental Health Service Organizations	Yes	Yes
Substance Abuse Service Organizations	Yes	Yes
Affordable Housing Developer(s)	Yes	Yes
Disability Service Organizations	Yes	Yes
Disability Advocates	Yes	Yes
Public Housing Authorities	Yes	Yes
CoC Funded Youth Homeless Organizations	Yes	Yes
Non-CoC Funded Youth Homeless Organizations	Not Applicable	No
Youth Advocates	Yes	Yes
School Administrators/Homeless Liaisons	Yes	Yes
CoC Funded Victim Service Providers	Not Applicable	No
Non-CoC Funded Victim Service Providers	Yes	Yes
Domestic Violence Advocates	Yes	Yes
Street Outreach Team(s)	Yes	Yes
Lesbian, Gay, Bisexual, Transgender (LGBT) Advocates	Not Applicable	No
LGBT Service Organizations	Not Applicable	No
Agencies that serve survivors of human trafficking	Yes	Yes
Other homeless subpopulation advocates	Yes	Yes
Homeless or Formerly Homeless Persons	Yes	Yes
Mental Illness Advocates	Yes	Yes
Substance Abuse Advocates	Yes	Yes

Other:(limit 50 characters)		
Landlords	Yes	Yes
Philanthropic Grantmakers	Yes	Yes
County Commissioners and other Elected Officials	Yes	No

**1B-1a. Applicants must describe the specific strategy the CoC uses to solicit and consider opinions from organizations and/or persons that have an interest in preventing or ending homelessness.
(limit 2,000 characters)**

The CoC regularly solicits input from a 25-member Advisory Council comprised of public, private, nonprofit, faith and community leaders that meets three times a year; a 16-member elected CoC Governing Board that meets bi-monthly; quarterly forums and an annual Summit open to CoC members and the public, and; policy-focused, volunteer Action Teams that meet regularly around issues that include street homelessness, supportive housing, housing affordability, equity and health system integration, among others. The Collaborative Applicant employs a full-time Community Outreach Manager to facilitate these meetings, as well as conduct outreach in-person, by phone and online to health and human service providers, funders, law enforcement, landlords, homeless advocates and people experiencing homelessness. The CoC is supported by Your Way Home Montgomery County, a public-private partnership that leverages and braids private funding with federal, state and local public funds and raises awareness of ending homelessness through a Collective Impact framework that encourages input from philanthropic funders and individual donors investing in ending homelessness. The CoC maintains a website at www.yourwayhome.org, and has an active Facebook page and Twitter account to engage CoC and community members in ongoing dialogue and information sharing. The CoC also conducts an annual program participant feedback focus group/interview process. The CoC Governing Board and the Collaborative Applicant review and incorporate all input from organizations and individuals into policies, procedures and marketing and outreach materials as best as possible. The CoC partners with local economic development, education, health and human service organizations to reach a broader audience, engage new CoC members and solicit information from the public.

1B-2.Open Invitation for New Members. Applicants must describe:

- (1) the invitation process;**
 - (2) how the CoC communicates the invitation process to solicit new members;**
 - (3) how often the CoC solicits new members; and**
 - (4) any special outreach the CoC conducted to ensure persons experiencing homelessness or formerly homeless persons are encouraged to join the CoC.**
- (limit 2,000 characters)**

The CoC regularly invites consumers, service providers, funders, community partners and the public to become CoC members through its website (where anyone can apply for membership online), its email newsletter (which is sent bi-monthly to all CoC members), regular Facebook and Twitter posts, and in-

person at quarterly community meetings held in various locations throughout the CoC. The process is simply to provide one's name, contact information and agreement to support the CoC's charter, goals and guiding principles. The CoC surveys existing members annually to confirm their interest, update their contact information, indicate their interest in joining the CoC Governing Board and/or policy action teams (committees). The CoC accepts both individual and organizational members. All CoC meetings are easily accessible to public transportation. CoC leaders and CoC-funded project staff actively recruit people with the lived experience of homelessness to become CoC members. People who are currently enrolled in homeless services are provided stipends in the form of gift cards and transportation subsidies for participating in CoC meetings and events. The CoC's primary brochure is written in both English and Spanish. The Collaborative Applicant employs a FT Community Outreach Manager to actively recruit new CoC members from traditionally under-represented groups of people experiencing homelessness/formerly homeless, including the LGBTQ community, seniors, medically frail individuals and Transition-Age Youth. The Community Outreach Manager also conducts CoC membership recruitment to landlords and professionals in law enforcement, early childhood/K-12 education, workforce development, health, mental/behavioral health and child welfare, among others.

1B-3.Public Notification for Proposals from Organizations Not Previously Funded. Applicants must describe how the CoC notified the public that it will accept and consider proposals from organizations that have not previously received CoC Program funding, even if the CoC is not applying for new projects in FY 2018, and the response must include the date(s) the CoC publicly announced it was open to proposals. (limit 2,000 characters)

On July 13, 2018, The Montgomery County Office of Housing & Community Development (OHCD), which serves as the PA-504 CoC Collaborative Applicant, notified the public that it would accept and consider new project application proposals from any organization, including those that has not previously received CoC Program funding. The notice was posted on the CoC webpage and through a dedicated e-mail blast to over 800 subscribers, the majority of whom are employed by nonprofit health, housing and human service provider organizations that are eligible and appropriate for applying for CoC project funding. OHCD also invited ESG, CDBG and local Affordable Housing Trust Fund contracted providers to compete in the new project application process. The CoC's Community Outreach Manager tweeted the new project application process as well. The CoC required new project applicants to complete a ten question application. The applications were then reviewed, scored and ranked by a committee of the CoC Governing Board. The CoC Governing Board approved the list of approved and ranked projects. All project applicants were notified in writing as to whether or not their project would be included in the FY 2018 CoC Program Competition process.

1C. Continuum of Care (CoC) Coordination

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1C-1. CoCs Coordination, Planning, and Operation of Projects. Applicants must use the chart below to identify the federal, state, local, private, and other organizations that serve individuals, families, unaccompanied youth, persons who are fleeing domestic violence who are experiencing homelessness, or those at risk of homelessness that are included in the CoCs coordination, planning, and operation of projects.

Entities or Organizations the CoC coordinates planning and operation of projects	Coordinates with Planning and Operation of Projects
Housing Opportunities for Persons with AIDS (HOPWA)	Yes
Temporary Assistance for Needy Families (TANF)	Yes
Runaway and Homeless Youth (RHY)	Not Applicable
Head Start Program	Yes
Funding Collaboratives	Yes
Private Foundations	Yes
Housing and services programs funded through U.S. Department of Justice (DOJ) Funded Housing and Service Programs	No
Housing and services programs funded through U.S. Health and Human Services (HHS) Funded Housing and Service Programs	Yes
Housing and service programs funded through other Federal resources	Yes
Housing and services programs funded through State Government	Yes
Housing and services programs funded through Local Government	Yes
Housing and service programs funded through private entities, including foundations	Yes
Other:(limit 50 characters)	

1C-2. CoC Consultation with ESG Program Recipients. Applicants must describe how the CoC:

- (1) consulted with ESG Program recipients in planning and allocating ESG funds; and**
 - (2) participated in the evaluating and reporting performance of ESG Program recipients and subrecipients.**
- (limit 2,000 characters)**

The CoC receives ESG funding directly from HUD; the other ESG recipient covering the CoC's geography is the Commonwealth of Pennsylvania (the State). The CoC Governing Board and Collaborative Applicant review and align with the State's ESG funding priorities during its annual CoC Grant Program

application process. The CoC's Collaborative Applicant receives ESG funds from the State in order to supplement CoC Rapid Re-Housing funding. The CoC provides Point-In Time Count (PIT) data, the CAPER, and other data by the State as requested. The CoC evaluates all homeless service agencies using standardized performance measures by program type, and evaluates ESG grant management outcomes consistent with the State's ESG monitoring process. The Montgomery County Office of Housing & Community Development is both the CoC's Collaborative Applicant/lead agency and the ESG recipient for Montgomery County. The CoC collaborates with the other three Con Plan jurisdictions of Lower Merion, Norristown and Abington by sharing Housing Inventory Count and PIT data and soliciting input from their representative leaders about CoC activities that impact all of the jurisdictions through regular meetings and ongoing email exchanges. In addition, the Con Plan Municipality of Norristown serves on the CoC Governing Board.

1C-2a. Providing PIT and HIC Data to Consolidated Plan Jurisdictions. Did the CoC provide Point-in-Time (PIT) and Housing Inventory Count (HIC) data to the Consolidated Plan jurisdictions within its geographic area? Yes to both

1C-2b. Providing Other Data to Consolidated Plan Jurisdictions. Did the CoC provide local homelessness information other than PIT and HIC data to the jurisdiction(s) Consolidated Plan(s)? Yes

1C-3. Addressing the Safety Needs of Domestic Violence, Dating Violence, Sexual Assault, and Stalking Survivors. Applicants must describe:

(1) the CoC's protocols, including the existence of the CoC's emergency transfer plan, that prioritizes safety and trauma-informed, victim-centered services to prioritize safety; and

**(2) how the CoC maximizes client choice for housing and services while ensuring safety and confidentiality.
(limit 2,000 characters)**

The CoC makes every effort to protect the safety of families and individuals who are survivors of Domestic Violence, Dating Violence, Sexual Assault and Stalking Survivors. The CoC partners with both Domestic Violence service providers in its region, one of whom is a VAWA-funded service provider of Emergency Shelter and Transitional Housing to Domestic Violence survivors, all of whose program participants are eligible for all CoC Street Outreach, Homeless Prevention, Diversion, RRH and PSH programs. All CoC providers are trained in Trauma-Informed Care. The CoC's Coordinated Entry System has safety planning protocols for people fleeing DV, including a warm handoff to the local DV hotline and an anonymous coding system in HMIS. No personally identifying information is recorded by CES or HMIS for people fleeing DV. The CoC has a victim-centered Emergency Transfer Plan in its Operations Manual that allows for the safe, efficient and confidential transfer of people from unsafe

housing situations and responds to their housing preferences to the greatest possible extent. The CoC Program Manager employed by the Montgomery County Office of Housing and Community Development is responsible for working directly with clients in need of an Emergency Transfer and their case manager(s) to ensure a safe and secure transfer occurs. DV providers are active CoC members and participate in CoC policy action and advisory teams, specifically to provide input on how CoC policies and procedures can be improved to better ensure the safety and security of DV survivors. The CoC also consults with local leaders in the criminal justice system, including judges, attorneys and law enforcement, to explore opportunities to align homeless system priorities with community safety and crime reduction.

1C-3a. Applicants must describe how the CoC coordinates with victim services providers to provide annual training to CoC area projects and Coordinated Entry staff that addresses best practices in serving survivors of domestic violence, dating violence, sexual assault, and stalking. (limit 2,000 characters)

All CoC service providers are required to attend an annual training that includes a dedicated session on how to work with people fleeing or survivors of Domestic Violence and other forms of violence in a safe, respectful and trauma-informed way. Participating CoC providers are also trained in Trauma-Informed Care through a partnership with the United Way of Greater Philadelphia and Southern New Jersey, a leading regional expert on trauma-informed practice, in order to avoid unnecessary re-traumatization. The CoC's Coordinated Entry System is operated by 2-1-1 of Southeastern Pennsylvania. In addition to participating in the CoC's annual training described above, all 2-1-1 staff receive internal training in Trauma-Informed Care and working with people fleeing DV and other forms of violence and assault.

1C-3b. Applicants must describe the data the CoC uses to assess the scope of community needs related to domestic violence, dating violence, sexual assault, and stalking, including data from a comparable database. (limit 2,000 characters)

The DV Emergency Shelter and Transitional Housing service provider in the CoC's geographic service area maintains a separate but comparable database and submits quarterly aggregate reports to the CoC. This data, along with de-identified HMIS data, is reviewed and analyzed by the CoC to identify needs and trends related to Domestic Violence survivors experiencing homelessness. These needs and trends are shared with the CoC Governing Board, Program Manager and the Your Way Home public-private partnership and funding collaborative to end homelessness to inform future policies, procedures and philanthropic investments. The CoC also receives de-identified data on Domestic Violence, dating violence, sexual assault and stalking from its' Coordinated Entry System Call Center operated by 2-1-1 of Southeastern Pennsylvania which is used to identify additional resources, services and trainings needed to better serve these victims and survivors.

**1C-4. DV Bonus Projects. Is your CoC Yes
applying for DV Bonus Projects?**

1C-4a. From the list, applicants must indicate the type(s) of DV Bonus project(s) that project applicants are applying for which the CoC is including in its Priority Listing.

SSO Coordinated Entry	<input type="checkbox"/>
RRH	<input checked="" type="checkbox"/>
Joint TH/RRH	<input checked="" type="checkbox"/>

1C-4b. Applicants must describe:

- (1) how many domestic violence survivors the CoC is currently serving in the CoC's geographic area;
- (2) the data source the CoC used for the calculations; and
- (3) how the CoC collected the data.
(limit 2,000 characters)

The CoC is currently serving 351 DV survivors, including 114 people actively fleeing DV, through CoC-funded programs according to HMIS, which has unique data elements for this purpose. The data is collected through enrollment in Street Outreach, Emergency Shelter, Transitional Housing, Rapid Re-Housing and Permanent Supportive Housing by case managers who are trained in trauma-informed care and best practices for working with DV survivors. When a program participant discloses that they are a DV survivor, the case manager uses an HMIS protocol to remove any personally identifying information from their client record. Aggregate data on number of DV survivors served is then extracted from HMIS by the Collaborative Applicant's HMIS Data Manager. Over the past year, two dedicated DV service providers that are not CoC-funded but who formally partner with the CoC served 1,866 and 4,826 DV survivors respectively, according to their HMIS-comparable databases and provide aggregate reports to the CoC (though it is possible that some of these households are duplicated). Because domestic violence information is de-identified, it is not possible to combine counts from multiple sources into one unduplicated total. However, both of these DV providers have reported that the need for housing assistance among their client base far exceeds the supply available through their own programs or existing CoC projects. As a result, both DV providers have applied for new CoC-funded housing projects and both of these projects appear in the CoC's FY 2018 CoC Priority Listing as DV bonus projects.

1C-4c. Applicants must describe:

- (1) how many domestic violence survivors need housing or services in the CoC's geographic area;
- (2) data source the CoC used for the calculations; and
- (3) how the CoC collected the data.
(limit 2,000 characters)

Among Domestic Violence survivors served by non-DV CoC providers whose data was extracted from the CoC's HMIS, 231 adults need housing or services, including 78 individuals actively fleeing DV. The CoC calculated the number of DV survivors in need of housing or services by subtracting those with a Housing

Move-In Date for RRH or PSH combined with those households who exited to a permanent housing destination from Emergency Shelter, Transitional Housing or Street Outreach from the total households served in all projects. The Domestic Violence shelter in the CoC's geographic area served 64 families (64 adults, 83 children) in the past year, and all 64 households needed housing assistance. Of the 478 calls that came into the shelter's DV hotline, approximately 60% (287 callers) needed some form of housing services. Data sources and collection methodology are the same as those explained in 1C-4b and include HMIS and the DV shelter/hotline's HMIS-comparable database aggregated export reports provided to the CoC. Because domestic violence information is de-identified, it is not possible to combine counts from multiple sources into one unduplicated total.

1C-4d. Based on questions 1C-4b. and 1C-4c., applicant must:

- (1) describe the unmet need for housing and services for DV survivors, or if the CoC is applying for an SSO-CE project, describe how the current Coordinated Entry is inadequate to address the needs of DV survivors;**
 - (2) quantify the unmet need for housing and services for DV survivors;**
 - (3) describe the data source the CoC used to quantify the unmet need for housing and services for DV survivors; and**
 - (4) describe how the CoC determined the unmet need for housing and services for DV survivors.**
- (limit 3,000 characters)**

The CoC engaged the two major DV service providers operating in its geographic area and the Pennsylvania Coalition Against Domestic Violence to better understand the unmet need for housing and services for DV survivors. These organizations informed the CoC that domestic violence is under-counted and cited national statistics indicating that less than half of incidents of domestic abuse are reported, either due to fear or lack of appropriate levels of support. The waiting list for families in need of Rapid Re-Housing has grown over the past year, and the CoC's street outreach team estimates domestic violence is a contributor to at least 40% of the street homeless population within the CoC. However, the CoC currently does not have any RRH projects that specifically serve DV survivors. All DV survivors experiencing homelessness who contact the CoC's Call Center are eligible for RRH, but in the past year, the CoC's non-DV specific RRH program served only 93 adults with domestic violence history, including 28 actively fleeing domestic violence. Given that 114 adult survivors were served by non-DV providers overall, this represents a potential unmet need for housing of 86 DV survivors. The local DV shelter informed the CoC that of 64 sheltered households in need of housing assistance, only 12 received relocation assistance (security deposits, moving costs) and 12 were served in DV TH, representing a potential additional unmet need of 40 households. 287 callers to the DV hotline reporting a need for housing services were not included in the count, as all received some form of temporary assistance. Still, these additional households may have been more appropriately served in a RRH program. Finally, the DV shelter also reported that an unspecified percentage of survivors continue to reside with their abusers, primarily due to a lack of affordable housing resources. Data sources and collection methodology are the same as those explained in 1C-4b. The CoC determined unmet need by considering 1) the number of survivors served in non-DV homeless projects and not yet re-housed, 2) the number of survivors residing in the DV shelter but not receiving housing assistance, and 3) the number of callers to the DV hotline

who reported need for housing services.

1C-4e. Applicants must describe how the DV Bonus project(s) being applied for will address the unmet needs of domestic violence survivors. (limit 2,000 characters)

The two DV Bonus projects will significantly enhance the CoC's capacity to address the unmet need for housing and services to DV survivors, as well as bring new expertise in working with DV survivors that can be shared with CoC providers and help to diversify the leadership of the CoC Governing Board and advisory teams. The CoC currently does not have any dedicated RRH projects for DV survivors. The TH-RRH project will provide stable Transitional Housing for people actively fleeing DV and then help the victim and their family exit quickly into safe and secure permanent housing with case management and rental subsidy for up to two years. The TH-RRH project will offer program participants additional resources to support the unique needs of DV survivors, including medical advocates embedded in two health systems operating in the CoC's geographic area and staff embedded in the Norristown Court House to provide assistance onsite to victims seeking Protection from Abuse Orders. The RRH project will be operated by the DV provider in the CoC's geographic area that operates a 30-Day Crisis Shelter for abused women and their children and operates a 24/7 hotline and in-person crisis response which gives access to trained counselor advocates with direct access to shelter placement. Together, these two projects will provide dedicated CoC RRH for DV survivors, meeting much of the unmet need for housing and provide integrated with crisis response for people actively fleeing DV, shelter, medical care and legal services to offer safe, trauma-informed and victim-centered care to DV survivors. The CoC will create special protocols for both DV Bonus project providers to work with the CES Call Center and Street Outreach Team, as well as with the Collaborative Applicant's CoC Program Manager and HMIS Data Manager to manage program participant data in ways that neither disclose personally identifying information nor violate VAWA data entry restrictions for victims service providers.

1C-4f. Applicants must address the capacity of each project applicant applying for DV bonus projects to implement a DV Bonus project by describing:

- (1) rate of housing placement of DV survivors;**
- (2) rate of housing retention of DV survivors;**
- (3) improvements in safety of DV survivors; and**
- (4) how the project applicant addresses multiple barriers faced by DV survivors.**

(limit 4,000 characters)

The CoC will leverage the expertise of its existing RRH providers, who typically exit upwards of 74% from RRH to permanent housing, to help both DV Bonus project providers to learn how to effectively implement successful Rapid Re-Housing housing location and case management services for DV survivors to build the capacity of both project applicants to deliver high rates of housing placement and retention. Both DV Bonus project applicants have a strong legacy of performance and respect in the CoC's geographic area, and have proven strategies and services in place to improve the safety and address the

multiple barriers faced by DV survivors, including improving financial stability, life counseling, safety planning, legal advocacy, and locating housing solutions distant from abusers. Both DV Bonus project applicants noted that trauma is a barrier to long-term housing stability for DV survivors, and the need to focus on recovery. The TH-RRH project applicant will utilize TH to provide temporary housing while helping households locate housing and has medical and legal advocacy services to improve their housing retention, health, mental health, safety and legal barriers. To provide therapeutic services, the applicant has formal partnerships with a major behavioral health provider and regional healthcare system, supplemented by a referral database of local therapists who provide reduced or sliding fee rates to victims they refer. In addition, the applicant has a partnership with another victims service provider to provide therapeutic services to children, families and victims of sexual assault. The RRH project applicant has a shelter and its own Transitional Housing to provide temporary housing while helping households locate housing and provide legal and counseling services to improve housing retention and address safety and legal barriers. The applicant's staff and volunteers are specifically training, as required by the Pennsylvania Coalition Against Domestic Violence, and are also trained in the area of Trauma Informed Care. In addition, the population being served by the applicant has many other identified concerns including: mental health; drug addiction; disability; medical concerns; and, trauma. The applicant has lengthy experience in meeting these additional needs, and/or helping clients connect with other service providers who can meet these needs.

1C-5. PHAs within CoC. Applicants must use the chart to provide information about each Public Housing Agency (PHA) in the CoC's geographic areas:

- (1) Identify the percentage of new admissions to the Public Housing or Housing Choice Voucher (HCV) Programs in the PHA who were experiencing homelessness at the time of admission;**
- (2) Indicate whether the PHA has a homeless admission preference in its Public Housing and/or HCV Program; and**
- (3) Indicate whether the CoC has a move on strategy. The information should be for Federal Fiscal Year 2017.**

Public Housing Agency Name	% New Admissions into Public Housing and Housing Choice Voucher Program during FY 2017 who were experiencing homelessness at entry	PHA has General or Limited Homeless Preference	PHA has a Preference for current PSH program participants no longer needing intensive supportive services, e.g. move on?
Montgomery County Housing Authority	0.10%	Yes-Both	No

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-5a. For each PHA where there is not a homeless admission preference

FY2018 CoC Application	Page 12	09/18/2018
------------------------	---------	------------

**in their written policy, applicants must identify the steps the CoC has taken to encourage the PHA to adopt such a policy.
(limit 2,000 characters)**

N/A

1C-5b. Move On Strategy with Affordable Housing Providers. Does the CoC have a Move On strategy with affordable housing providers in its jurisdiction (e.g., multifamily assisted housing owners, PHAs, Low Income Tax Credit (LIHTC) developments, or local low-income housing programs)?

Yes

**Move On strategy description.
(limit 2,000 characters)**

The CoC Collaborative Applicant/Lead Agency has a Move On Strategy for affordable housing providers that are awarded low-income tax credits in its jurisdiction by the Pennsylvania Housing Finance Agency (PHFA) to set aside between 5 and 10% of all newly constructed units for people exiting from homelessness or people with disabilities. In the last 12 months, the CoC Collaborative Applicant/Lead Agency has been successful in securing a total of 29 affordable housing units set aside for people exiting from homelessness with housing assistance, primarily PSH clients who no longer need intensive supportive services.

**1C-6. Addressing the Needs of Lesbian, Gay, Bisexual, Transgender (LGBT). Applicants must describe the actions the CoC has taken to address the needs of Lesbian, Gay, Bisexual, and Transgender individuals and their families experiencing homelessness.
(limit 2,000 characters)**

The CoC has instituted policies and training to address the needs of Lesbian, Gay, Bisexual, and Transgender individuals and families experiencing homelessness. CoC program participants shall be treated according to their self-reported gender identity regardless of appearance, genital or other physical characteristics, or inconsistent legal documentation (such as a driver's license). Transgender individuals presenting for intake shall not to be turned away or referred to another shelter or program because of their transgender status, the length or extent of their gender transition, and/or because they do not meet the expectations of what a man or woman is supposed to look like. Private information, such as medical information about a consumer's transgender status and/or transition, is confidential. Provider staff address consumers with names, titles, pronouns, and other terms consistent with their gender identity. All assertions by consumers of their gender identity will be presumed accurate and shall not be questioned by staff. More on this policy can be found in the CoC's Operations Manual, the Your Way Home Operations Manual (Policy Section: 1.28). One of the CoC RRH providers, Valley Youth House, works with many consumers identifying as LGBTQ and has focused on making sure these shelters and programs are welcomed and safe spaces. Additionally, Valley Youth House has focused professional development programming to include

trainings on providing services to LGBTQ young people. Valley Youth House has shared this information with other CoC providers and actively participates in the CoC Governing Board and on CoC policy action teams. The CoC has also launched a formal Equity Evaluation to identify disparities in system leadership, decision-making, outcomes, policies and practices based on race, ethnicity, gender identity and sexual orientation and to develop transformational, long-term solutions.

1C-6a. Anti-Discrimination Policy and Training. Applicants must indicate if the CoC implemented a CoC-wide anti-discrimination policy and conducted CoC-wide anti-discrimination training on the Equal Access Final Rule and the Gender Identity Final Rule.

1. Did the CoC implement a CoC-wide anti-discrimination policy that applies to all projects regardless of funding source?	Yes
2. Did the CoC conduct annual 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 (Equal Access Final Rule)?	Yes
3. Did the CoC conduct annual CoC-wide training with providers on how to effectively implement Equal Access to Housing in HUD Programs in Accordance with an Individual's Gender Identity (Gender Identity Final Rule)?	Yes

1C-7. Criminalization of Homelessness. Applicants must select the specific strategies the CoC implemented to prevent the criminalization of homelessness in the CoC's geographic area. Select all that apply.

Engaged/educated local policymakers:	<input checked="" type="checkbox"/>
Engaged/educated law enforcement:	<input checked="" type="checkbox"/>
Engaged/educated local business leaders:	<input type="checkbox"/>
Implemented communitywide plans:	<input type="checkbox"/>
No strategies have been implemented:	<input type="checkbox"/>
Other:(limit 50 characters)	
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

1C-8. Centralized or Coordinated Assessment System. Applicants must:
(1) demonstrate the coordinated entry system covers the entire CoC geographic area;
(2) demonstrate the coordinated entry system reaches people who are least likely to apply homelessness assistance in the absence of special outreach;

**(3) demonstrate the assessment process prioritizes people most in need of assistance and ensures they receive assistance in a timely manner; and
(4) attach CoC's standard assessment tool.
(limit 2,000 characters)**

The CoC's Coordinated Entry System (CES) is branded "Your Way Home" and is accessible 24/7 to anyone experiencing or at imminent risk of homelessness throughout the entire CoC geographic area. Anyone experiencing homelessness simply calls 211 or 866-964-7925 toll-free and presses 2, indicating they are homeless or in need of shelter (or texts 898-211). Monday through Friday from 8 am to 7 pm, calls are answered or returned by a Call Center Specialist who conducts a full intake, including: 1) safety planning (warm transfer to a DV hotline or 911 if necessary), 2) HMIS client record search and permission to share data (or an anonymous data protocol for people fleeing DV or who refuse to share information), 3) fielding the VI-SPDAT screening tool, 4) referral to Emergency Shelter if necessary and 5) placement on the Community Queue (CQ) in HMIS for Diversion, Rapid Re-Housing or Permanent Supportive Housing. Veterans are also connected to SSVF. After hours, on weekends and holidays, calls are answered by a 211 operator who connects literally homeless households to the CoC's 24/7 Street Outreach Team and others to prevention. Street Outreach provides mobile crisis response to anyone experiencing literal homelessness, anywhere in the CoC. Street Outreach can help the household get into Emergency Shelter or a hotel (using vouchers funded by the Your Way Home philanthropic funders collaborative). Once people are placed on the CQ, they are contacted by a service provider within 2 business days for either Diversion, RRH enrollment or referral to PSH/PHA public housing. CES marketing materials are posted on the CoC website and Facebook page and are distributed in English and Spanish printed flyers at community and drop-in centers, health and human service provider agencies, hospitals and other public locations. All CES providers are trauma-informed and trained in progressive engagement. CES is overseen by the Collaborative Applicant's full-time Your Way Home Program Manager.

1D. Continuum of Care (CoC) Discharge Planning

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1D-1. Discharge Planning–State and Local. Applicants must indicate whether the CoC has a discharge policy to ensure persons discharged from the systems of care listed are not discharged directly to the streets, emergency shelters, or other homeless assistance programs. Check all that apply (note that when "None:" is selected no other system of care should be selected).

Foster Care:	<input checked="checked" type="checkbox"/>
Health Care:	<input checked="checked" type="checkbox"/>
Mental Health Care:	<input checked="checked" type="checkbox"/>
Correctional Facilities:	<input checked="checked" type="checkbox"/>
None:	<input type="checkbox"/>

1D-2. Discharge Planning Coordination. Applicants must indicate whether the CoC actively coordinates with the systems of care listed to ensure persons who have resided in them longer than 90 days are not discharged directly to the streets, emergency shelters, or other homeless assistance programs. Check all that apply (note that when "None:" is selected no other system of care should be selected).

Foster Care:	<input checked="checked" type="checkbox"/>
Health Care:	<input checked="checked" type="checkbox"/>
Mental Health Care:	<input checked="checked" type="checkbox"/>
Correctional Facilities:	<input checked="checked" type="checkbox"/>
None:	<input type="checkbox"/>

1E. Continuum of Care (CoC) Project Review, Ranking, and Selection

Instructions

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

1E-1. Project Ranking and Selection. Applicants must indicate whether the CoC used the following to rank and select project applications for the FY 2018 CoC Program Competition:

- (1) objective criteria;**
- (2) at least one factor related to achieving positive housing outcomes;**
- (3) a specific method for evaluating projects submitted by victim services providers; and**
- (4) attach evidence that supports the process selected.**

Used Objective Criteria for Review, Rating, Ranking and Section	Yes
Included at least one factor related to achieving positive housing outcomes	Yes
Included a specific method for evaluating projects submitted by victim service providers	Yes

1E-2. Severity of Needs and Vulnerabilities. Applicants must describe:

- (1) the specific severity of needs and vulnerabilities the CoC considered when reviewing, ranking, and rating projects; and**
- (2) how the CoC takes severity of needs and vulnerabilities into account during the review, rating, and ranking process.**

(limit 2,000 characters)

The CoC's ranking and selection process considered the extent to which projects served high needs populations, including the percentage of individuals served 1) with a disabling condition (physical disability, mental health condition, substance use, developmental disability, HIV/AIDS, and/or chronic health condition); 2) with no income; and 3) who entered the project from a place not meant for human habitation. The CoC used the HUD Rating and Ranking Tool to rate, select and rank new and renewal projects for the FY18 Grant Competition. Projects were assigned points for each of the three categories mentioned above. In its new project application, the CoC solicited RRH project proposals to serve priority categories including families with children under age 5, households with parenting youth aged 18-24 and victims of domestic violence. A subcommittee of the CoC Governing Board reviewed and discussed each project's ability to meet the needs and vulnerabilities identified above. Additionally, the CoC developed a rating and ranking tool, based on USICH guidelines, for projects serving victims of domestic violence. While no current renewal projects receive CoC funds for this subpopulation, future DV renewal projects will be evaluated using this new DV rating tool.

1E-3. Public Postings. Applicants must indicate how the CoC made public:

- (1) objective ranking and selection process the CoC used for all projects (new and renewal);
- (2) CoC Consolidated Application—including the CoC Application, Priority Listings, and all projects accepted and ranked or rejected, which HUD required CoCs to post to their websites, or partners websites, at least 2 days before the CoC Program Competition application submission deadline; and
- (3) attach documentation demonstrating the objective ranking, rating, 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, that legibly displays the date the CoC publicly posted the documents.

Public Posting of Objective Ranking and Selection Process		Public Posting of CoC Consolidated Application including: CoC Application, Priority Listings, Project Listings	
CoC or other Website	<input checked="" type="checkbox"/>	CoC or other Website	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>	Email	<input checked="" type="checkbox"/>
Mail	<input type="checkbox"/>	Mail	<input type="checkbox"/>
Advertising in Local Newspaper(s)	<input type="checkbox"/>	Advertising in Local Newspaper(s)	<input type="checkbox"/>
Advertising on Radio or Television	<input type="checkbox"/>	Advertising on Radio or Television	<input type="checkbox"/>
Social Media (Twitter, Facebook, etc.)	<input checked="" type="checkbox"/>	Social Media (Twitter, Facebook, etc.)	<input checked="" type="checkbox"/>

1E-4. Reallocation. Applicants must indicate whether the CoC has cumulatively reallocated at least 20 percent of the CoC's ARD between the FY 2014 and FY 2018 CoC Program Competitions.

Reallocation: Yes

1E-5. Local CoC Competition. Applicants must indicate whether the CoC:

- (1) established a deadline for project applications that was no later than 30 days before the FY 2018 CoC Program Competition Application deadline—attachment required;
- (2) rejected or reduced project application(s)—attachment required; and
- (3) notify applicants that their project application(s) were being rejected or reduced, in writing, outside of e-snaps, at least 15 days before FY 2018 CoC Program Competition Application deadline—attachment required. :

(1) Did the CoC establish a deadline for project applications that was no later than 30 days before the FY 2018 CoC Program Competition Application deadline? Attachment required.	Yes
(2) If the CoC rejected or reduced project application(s), did the CoC notify applicants that their project application(s) were being rejected or reduced, in writing, outside of e-snaps, at least 15 days before FY 2018 CoC Program Competition Application deadline? Attachment required.	Yes
(3) Did the CoC notify applicants that their applications were accepted and ranked on the Priority Listing in writing outside of e-snaps, at least 15 before days of the FY 2018 CoC Program Competition Application deadline?	Yes

2A. Homeless Management Information System (HMIS) Implementation

Intructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

2A-1. Roles and Responsibilities of the CoC and HMIS Lead. Does your 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? Attachment Required. Yes

2A-1a. Applicants must: 3-4, 14-16 Governance Charter
 (1) 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, and
 (2) indicate the document type attached for question 2A-1 that includes roles and responsibilities of the CoC and HMIS Lead (e.g., Governance Charter, MOU/MOA).

2A-2. HMIS Policy and Procedures Manual. Does your CoC have a HMIS Policy and Procedures Manual? Attachment Required. Yes

2A-3. HMIS Vender. What is the name of the HMIS software vendor? Clarity Human Services

2A-4. HMIS Implementation Coverage Area. Using the drop-down boxes, applicants must select the HMIS implementation Coverage area. Single CoC

2A-5. Bed Coverage Rate. Using 2018 HIC and HMIS data, applicants must report by project type:
 (1) total number of beds in 2018 HIC;
 (2) total beds dedicated for DV in the 2018 HIC; and

(3) total number of beds in HMIS.

Project Type	Total Beds in 2018 HIC	Total Beds in HIC Dedicated for DV	Total Beds in HMIS	HMIS Bed Coverage Rate
Emergency Shelter (ES) beds	198	24	161	92.53%
Safe Haven (SH) beds	0	0	0	
Transitional Housing (TH) beds	75	15	60	100.00%
Rapid Re-Housing (RRH) beds	368	0	368	100.00%
Permanent Supportive Housing (PSH) beds	228	6	222	100.00%
Other Permanent Housing (OPH) beds	0	0	0	

**2A-5a. To receive partial credit, if the bed coverage rate is 84.99 percent or lower for any of the project types in question 2A-5., applicants must provide clear steps on how the CoC intends to increase this percentage for each project type over the next 12 months.
(limit 2,000 characters)**

N/A

**2A-6. AHAR Shells Submission: How many 7
2017 Annual Housing Assessment Report
(AHAR) tables shells did HUD accept?**

**2A-7. CoC Data Submission in HDX. 04/27/2018
Applicants must enter the date the CoC
submitted the 2018 Housing Inventory Count
(HIC) data into the Homelessness Data
Exchange (HDX).
(mm/dd/yyyy)**

2B. Continuum of Care (CoC) Point-in-Time Count

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

2B-1. PIT Count Date. Applicants must enter 01/31/2018
the date the CoC conducted its 2018 PIT
count (mm/dd/yyyy).

2B-2. HDX Submission Date. Applicants 04/04/2018
must enter the date the CoC submitted its PIT
count data in HDX (mm/dd/yyyy).

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

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

**2C-1. Change in Sheltered PIT Count Implementation. Applicants must describe any change in the CoC's sheltered PIT count implementation, including methodology and data quality changes from 2017 to 2018. Specifically, how those changes impacted the CoC's sheltered PIT count results.
(limit 2,000 characters)**

From 2017 to 2018, the CoC's sheltered PIT Count decreased from 291 to 271 individuals. This decrease resulted from the conversion of 54 Transitional Housing beds into 54 units of Permanent Housing (including both CoC-funded and non-CoC funded RRH and PSH), though it was partially offset by an increase of 34 Emergency Shelter beds (resulting from increased overflow bed capacity due to a Code Blue hazardous weather declaration). Prior to the 2018 PIT Count, the CoC hired a new HMIS Data Manager, a position that was vacant during the 2017 PIT Count. With oversight from a dedicated HMIS specialist, all data for the 2018 sheltered PIT Count was extracted from HMIS. Both on the evening of the PIT Count and the following morning, the HMIS Data Manager coordinated with all shelter providers to verify the accuracy of HMIS records and ensure that data quality was as close to 100% as possible. The CoC's Community Relations Manager conducted outreach to other homeless and related human service providers not participating in HMIS to obtain a count of homeless individuals sheltering in these locations. These changes in methodology resulted in a more accurate count than was possible the previous year.

2C-2. Did your CoC change its provider coverage in the 2018 sheltered count? Yes

2C-2a. If "Yes" was selected in 2C-2, applicants must enter the number of beds that were added or removed in the 2018 sheltered PIT count.

Beds Added:	3
Beds Removed:	54
Total:	-51

2C-3. Presidentially Declared Disaster Changes to Sheltered PIT Count. Did your CoC add or remove emergency shelter, No

transitional housing, or Safe Haven inventory because of funding specific to a Presidentially declared disaster, resulting in a change to the CoC's 2018 sheltered PIT count?

2C-3a. If "Yes" was selected for question 2C-3, applicants must enter the number of beds that were added or removed in 2018 because of a Presidentially declared disaster.

Beds Added:	0
Beds Removed:	0
Total:	0

2C-4. Changes in Unsheltered PIT Count Implementation. Did your CoC change its unsheltered PIT count implementation, including methodology and data quality changes from 2017 to 2018? If your CoC did not conduct and unsheltered PIT count in 2018, select Not Applicable. Yes

2C-4a. If "Yes" was selected for question 2C-4, applicants must:
(1) describe any change in the CoC's unsheltered PIT count implementation, including methodology and data quality changes from 2017 to 2018; and
(2) specify how those changes impacted the CoC's unsheltered PIT count results.
(limit 2,000 characters)

Yes, the CoC changed the unsheltered PIT Count implementation in 2018. In October 2017 the CoC's Collaborative Applicant/Lead Agency contracted with a new Street Outreach provider and expanded the Street Outreach program to provide outreach 24/7 to all street homeless individuals. Members of the new Street Outreach team served as the lead PIT Count staff, and targeted their efforts to last known locations of all unsheltered homeless individuals who had contacted the CoC's coordinated entry system. The new Street Outreach provider has more significantly more capacity and expertise to engage homeless individuals, as well as stronger working relationships with municipal law enforcement agencies, first responders and local hospital Emergency Departments. As a result, the CoC has greatly improved its knowledge of the identity and location of street homeless individuals throughout the year. The PIT Count data quality was improved by having Street Outreach workers deployed with and lead every catchment team. Street Outreach workers also provided a new training to all PIT Count volunteers on how to better engage with individuals in crisis, particularly with respect to the lived experience of street homelessness and related trauma.

2C-5. Identifying Youth Experiencing Homelessness in 2018 PIT Count. Did your Yes

CoC implement specific measures to identify youth experiencing homelessness in its 2018 PIT count?

2C-5a. If “Yes” was selected for question 2C-5., applicants must describe:
(1) how stakeholders serving youth experiencing homelessness were engaged during the planning process;
(2) how the CoC worked with stakeholders to select locations where youth experiencing homelessness are most likely to be identified; and
(3) how the CoC involved youth experiencing homelessness in counting during the 2018 PIT count.
(limit 2,000 characters)

The CoC invited stakeholders serving youth experiencing homelessness, including Valley Youth House (a youth-serving, CoC-funded housing and homeless service provider), the Montgomery County Office of Children and Youth, local police departments and day centers/shelters that serve youth in the PIT Count planning process through meetings and email communications to select locations where unsheltered youth might reside on the night of the Count. Valley Youth House also provided expertise on engaging youth, including LGBTQ youth, on the street. The CoC also engaged the local mental health mobile crisis team that works with children and youth who may or may not be experiencing homelessness. One of these teams connected the CoC to a young adult under the age of 24 and her two children fleeing Puerto Rico as a result of Hurricane Maria who would not otherwise have been identified in the PIT Count. One youth with the lived experience of homelessness participated in both the PIT Count planning process and served on one of the teams the night of the Count.

2C-6. 2018 PIT Implementation. Applicants must describe actions the CoC implemented in its 2018 PIT count to better count:
(1) individuals and families experiencing chronic homelessness;
(2) families with children experiencing homelessness; and
(3) Veterans experiencing homelessness.
(limit 2,000 characters)

Unlike previous years, the 2018 PIT Count was conducted via HMIS, which is programmed to identify individuals and families experiencing chronic homelessness, families with children experiencing homelessness and Veterans experiencing homelessness. Also new for 2018, the CoC Governing Board included representatives from the K-12 Education System and a human service provider that works with Seniors and Older Adults, including those who experience homelessness. The Governing Board provided additional input for how to better count families with school age children and seniors. For the unsheltered Count, volunteers used a survey that matched the 2017 HMIS Data Standards, including questions specifically designed to calculate chronic homelessness. Data elements for all unsheltered individuals were checked against the CoC’s HMIS to ensure that data was not missed during in-person interviews with unsheltered individuals. Veteran status was cross-checked in HMIS records and with the Montgomery County Office of Veteran Affairs. For unsheltered individuals served by the CoC’s Street Outreach team, any unclear data elements were verified with the Street Outreach worker for accuracy.

3A. Continuum of Care (CoC) System Performance

Instructions

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

3A-1. First Time Homeless as Reported in HDX. In the box below, applicants must report the number of first-time homeless as reported in HDX.

Number of First Time Homeless as Reported in HDX.	
---	--

647

3A-1a. Applicants must:

- (1) describe how the CoC determined which risk factors the CoC uses to identify persons becoming homeless for the first time;**
- (2) describe the CoC's strategy to address individuals and families at risk of becoming homeless; and**
- (3) provide the name of the organization or position title that is responsible for overseeing the CoC's strategy to reduce the number of individuals and families experiencing homelessness for the first time. (limit 2,000 characters)**

The CoC's Coordinated Entry System conducts the VI-SPDAT assessment with people who are at risk for becoming homeless, including families, individuals and youth who are doubled-up/couch surfing or are exiting from institutions or foster care. The VI-SPDAT is used to identify risk factors of becoming homeless for the first time, such as the person's utilization of crisis, hospital, or ER services; interaction with the criminal justice system; self-harming or risky behaviors; ability to manage money or finances; and a person's wellness. Anyone at risk of becoming homeless is enrolled in the CoC's Diversion from Shelter Program. Diversion is performed by trained case managers. Diversion helps families and individuals on the brink of homelessness develop plans to avoid entering a shelter or becoming/remaining street homeless by helping them create housing plans that are realistic and leverage their existing strengths and social networks. The CoC has also begun to research and develop new homeless prevention projects targeting vulnerable populations, including K-12 students with high mobility rates and people facing eviction. In order to understand how to expand its prevention strategies, the CoC undertook a research study in 2017 to study national trends and best practices. Conducted by Barbara Poppe, the study identified populations in the CoC most at risk of becoming homeless, promising prevention strategies, and potential pilot project ideas. As a result of the study, the CoC created two pilot programs based on the emerging risk factors of increased evictions and student mobility. The court-based prevention model, EPIC (Eviction Prevention & Intervention Coalition) began in November and the school based eviction prevention program the Sprout Initiative began in August; already over 50 families have been diverted from homelessness through these two programs. The Collaborative Applicant's Your Way Home Program Manager oversees all CoC prevention and Diversion

projects.

3A-2. Length-of-Time Homeless as Reported in HDX. Applicants must:

- (1) provide the average length of time individuals and persons in families remained homeless (i.e., the number);**
 - (2) describe the CoC's strategy to reduce the length-of-time individuals and persons in families remain homeless;**
 - (3) describe how the CoC identifies and houses individuals and persons in families with the longest lengths of time homeless; and**
 - (4) provide the name of the organization or position title that is responsible for overseeing the CoC's strategy to reduce the length of time individuals and families remain homeless.**
- (limit 2,000 characters)**

The average length of time (LOT) individuals and persons in families remained homeless was 157 days and the median LOT was 89 days. To reduce LOT, the CoC began holding quarterly provider meetings to focus on improving individual performance metrics including length of stay in shelter. Additionally, the CoC promotes low-barrier shelters that are providing housing-focused case management, wrap around services, connections to employment and non-cash benefits. Finally, the CoC analyzed the change in lengths of stay in shelter from the previous year and found that exit location (Permanent Housing compared to homelessness or unstable housing) acts as an intervening variable for LOT. The average LOT in shelter is longer for those who exit to permanent housing by 35-40 days, but the CoC was able to exit a higher percentage of households to permanent housing (57% in 2017, from 51% in 2016). In July 2017, the CoC established a monthly By-Name List meeting to review all homeless individuals and families in shelter and the street to identify those who have been homeless the longest and attempt to house them through case conferencing between RRH, Emergency Shelter and Street Outreach providers. Additionally, the CoC began to regularly analyze HMIS data in order to identify common characteristics of households with a longer LOT. The CoC Governing Board/Team is also charged with the responsibility for identifying potential solutions to reduce LOT based on this data analysis. Finally, the CoC has launched an Affordable Housing Strategic Planning process in partnership with the Montgomery County Planning Commission and Commerce Department with the goal of expanding affordable housing options for low-income residents and people exiting from homelessness throughout the CoC. The Collaborative Applicant's CoC Your Way Home Program Manager and the HMIS Data Manager are jointly responsible for overseeing all strategies for reducing the LOT individuals and families remain homeless.

3A-3. Successful Permanent Housing Placement and Retention as Reported in HDX. Applicants must:

- (1) provide the percentage of individuals and persons in families in emergency shelter, safe havens, transitional housing, and rapid rehousing that exit to permanent housing destinations; and**
- (2) provide the percentage of individuals and persons in families in permanent housing projects, other than rapid rehousing, that retain their permanent housing or exit to permanent housing destinations.**

Percentage

Report the percentage of individuals and persons in families in emergency shelter, safe havens, transitional housing, and rapid re-housing that exit to permanent housing destinations as reported in HDX.	59%
Report the percentage of individuals and persons in families in permanent housing projects, other than rapid re-housing, that retain their permanent housing or exit to permanent housing destinations as reported in HDX.	93%

3A-3a. Applicants must:

(1) describe the CoC's strategy to increase the rate at which individuals and persons in families in emergency shelter, safe havens, transitional housing and rapid rehousing exit to permanent housing destinations; and
 (2) describe the CoC's strategy to increase the rate at which individuals and persons in families in permanent housing projects, other than rapid rehousing, retain their permanent housing or exit to permanent housing destinations.

(limit 2,000 characters)

CoC strategies to increase the rate of exit from ES, TH and RRH to permanent housing destinations include 1) training and support for shelters to be low barrier and using housing-focused case management, 2) a 24/7 Street Outreach Team with the ability to RRH people directly from the street without entering shelter first or connecting them to PSH directly, 3) use of participant-defined housing stability plans and the full SPDAT as a case management tool and, 4) additional supports for RRH program participants with barriers like zero income, bad credit or criminal history. The CoC holds monthly meetings with RRH providers to discuss strategies for improving exits to permanent housing and reduce LOT homeless. The CoC also has a Street Homeless Advisory Team comprised of shelter, RRH, SSVF and Critical Time Intervention providers to identify and address barriers to housing for specific individuals using a BNL. CoC projects must submit monthly reports to the CoC's HMIS Data Manager, who monitors exit rates from each project type and uses the data with other metrics to distribute a quarterly system performance report. CoC strategies to increase the rate at which individuals and families retain permanent housing in PSH include 1) a Permanent Housing Advisory Team co-led by the County Office of Mental Health and comprised of PSH and supportive service providers with expertise in mental health, substance use and intellectual disabilities, financial counseling, supportive employment and other supportive services who use a BNL to conduct case conferencing and recommend policies to improve retention rates and 2) any discharge from a PSH project (to destinations other than PH must be reviewed by the Collaborative Applicant's CoC Program Manager and will be denied without sufficient justification. These strategies have resulted in 93% of clients maintaining stable housing. The CoC Program Manager is directly responsible for overseeing all strategies described above.

3A-4. Returns to Homelessness as Reported in HDX. Applicants must report the percentage of individuals and persons in families returning to homelessness over a 6- and 12-month period as reported in HDX.

	Percentage
Report the percentage of individuals and persons in families returning to homelessness over a 6- and 12-month period as reported in HDX	7%

3A-4a. Applicants must:

(1) describe how the CoC identifies common factors of individuals and

persons in families who return to homelessness;
(2) describe the CoC's strategy to reduce the rate of additional returns to homelessness; and
(3) provide the name of the organization or position title that is responsible for overseeing the CoC's strategy to reduce the rate individuals and persons in families returns to homelessness.
(limit 2,000 characters)

The CoC identifies common of factors of individuals and families who return to homelessness in HMIS. The Collaborative Applicant's CoC Program Manager and HMIS Data Manager monitor daily and report weekly on all current and former program participants who return to homelessness. The HMIS Data Manager regularly analyzes data to identify characteristics that likely drive returns to homelessness and brings key findings and trends to the CoC Governing Board for policy consideration. Analysis is done by running the System Performance Measures report and by using the proprietary data analytics tools developed by the CoC's HMIS vendor Clarity Human Services to examine whether trends exist across demographic categories such as race, ethnicity, gender, age and other causal factors. To reduce returns to homelessness, all CoC RRH providers connect households to programs that offer housing stability services and supports, including financial literacy counseling, legal counsel if they are facing eviction, employment and job training programs and SOAR/public benefits access. In addition, the CoC Program Manager provides regular training in Housing Focused Case Management to supportive providers, including mental health providers and substance use recovery providers. This year, the CoC is planning to establish an Emergency Rent Program to provide one-time case management and rental or utility assistance to former CoC program participants who are on the brink of returning to homelessness due to a temporary financial crisis. The CoC's Your Way Home philanthropic Funding Collaborative is currently seeking grant dollars to launch the program. The HMIS Data Manager and CoC Program Manager are jointly responsible for overseeing strategies to reduce the rate of returns to homelessness, monitor those rates and adjust CoC policies and procedures accordingly to reduce rates of return to homelessness.

3A-5. Job and Income Growth. Applicants must:

(1) describe the CoC's strategy to increase access to employment and non-employment cash sources;
(2) describe how the CoC works with mainstream employment organizations to help individuals and families increase their cash income; and
(3) provide the organization name or position title that is responsible for overseeing the CoC's strategy to increase job and income growth from employment.
(limit 2,000 characters)

The CoC has five major strategies to increase access to employment and non-employment cash sources for program participants. First, all CoC Emergency Shelter, Rapid Re-Housing and Permanent Supportive Housing providers are 1) trained in helping program participants identify goals related to financial stability, 2) are given access to a continually updated list of all employment, job training and cash benefit access services in the CoC's geographic area and 3) have performance measures related to increasing the cash income of program participants in their contracts with the Collaborative Applicant/Lead Agency as

an incentive. Providers are required to submit quarterly performance reports to the CoC. Second, the CoC Collaborative Applicant contracts with a nonprofit service provider for SOAR and connections to other public benefit access for CoC program participants. Third, the CoC has established an MOU with a food security nonprofit organization to offer all CoC Rapid Re-Housing program participants the opportunity to join a 12-week culinary job training program and earn a ServSafe Certification and connection to related employment opportunities. The CoC's philanthropic Funder Collaborative funds the job training program fee, subsidies transportation to and from the job training program and purchases uniforms and kitchen tools for the participant which they get to keep. Fourth, the Collaborative Applicant contracts with a non-CoC nonprofit financial literacy and counseling service providers that helps CoC program participants to access non-cash benefits. Fifth, the CoC partners with the county Office of Mental Health to streamline access to supportive employment programs for people with disabilities. A representative from the Office of Mental Health serves on the CoC Governing Board. The Collaborative Applicant's Your Way Home Program Manager is responsible for overseeing all CoC income-related strategies and serves on a local Workforce Investment Board committee.

3A-6. System Performance Measures Data 05/15/2018
Submission in HDX. Applicants must enter
the date the CoC submitted the System
Performance Measures data in HDX, which
included the data quality section for FY 2017
(mm/dd/yyyy)

3B. Continuum of Care (CoC) Performance and Strategic Planning Objectives

Instructions

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

3B-1. DedicatedPLUS and Chronically Homeless Beds. In the boxes below, applicants must enter:

- (1) total number of beds in the Project Application(s) that are designated as DedicatedPLUS beds; and
- (2) total number of beds in the Project Application(s) that are designated for the chronically homeless, which does not include those that were identified in (1) above as DedicatedPLUS Beds.

Total number of beds dedicated as DedicatedPLUS	97
Total number of beds dedicated to individuals and families experiencing chronic homelessness	123
Total	220

3B-2. Orders of Priority. Did the CoC adopt the Orders of Priority into their written 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? Attachment Required. Yes

3B-2.1. Prioritizing Households with Children. Using the following chart, applicants must check all that apply to indicate the factor(s) the CoC currently uses to prioritize households with children during FY 2018.

History of or Vulnerability to Victimization (e.g. domestic violence, sexual assault, childhood abuse)	<input checked="" type="checkbox"/>
Number of previous homeless episodes	<input checked="" type="checkbox"/>
Unsheltered homelessness	<input checked="" type="checkbox"/>
Criminal History	<input checked="" type="checkbox"/>
Bad credit or rental history	<input checked="" type="checkbox"/>
Head of Household with Mental/Physical Disability	<input checked="" type="checkbox"/>

3B-2.2. Applicants must:

- (1) describe the CoC's current strategy to rapidly rehouse every household of families with children within 30 days of becoming homeless;
- (2) describe how the CoC addresses both housing and service needs to ensure families successfully maintain their housing once assistance ends; and
- (3) provide the organization name or position title responsible for overseeing the CoCs strategy to rapidly rehouse families with children within 30 days of becoming homeless.
- (limit 2,000 characters)

The CoC prioritizes families with children aged 0-5 who are experiencing homelessness for both Rapid Re-Housing and Emergency Shelter. If shelter is not available, families are provided hotel vouchers through the CoC's Your Way Home philanthropic Funders Collaborative. The CoC's RRH case managers conduct the full SPDAT assessment on all families in need of RRH and works with them to create a housing stability plan with goals for housing, health, education, employment and financial literacy, including a household budget. Within two weeks of beginning RRH intake, the CoC assigns families with a dedicated Housing Locator who helps them find and move-in to housing in their community of choice. Once a family accepts a unit, an HQS inspection is done and the family moves in. Additional philanthropic funding is used to support move-in costs, including beds and basic household goods, as well as public transportation to and from service appointments, medical supplies and/or job training program fees if needed. In addition to providing housing case management and a housing subsidy while families are enrolled in Rapid Re-Housing, the case manager also connects them to the CoC's network of education, health and human service providers to help them achieve the other goals in their housing stability plan. The Collaborative Applicant employs a full-time Your Way Home Program Manager to oversee CoC-funded RRH service providers, monitor the timeframe and Community Queue in HMIS, provide training in best practices and develop/refine policies and procedures for the purpose of exiting as many families as possible within 30 days of their becoming homeless. The most significant challenge facing the CoC in meeting this goal is that the geographic area is a high rent community with a small supply of affordable units available to extremely low-income families experiencing homelessness.

3B-2.3. Antidiscrimination Policies. Applicants must check all that apply that describe actions the CoC is taking to ensure providers (including emergency shelter, transitional housing, and permanent supportive housing (PSH and RRH) within the CoC adhere to antidiscrimination 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.

CoC conducts mandatory training for all CoC and ESG funded service providers on these topics.	<input checked="" type="checkbox"/>
CoC conducts optional training for all CoC and ESG funded service providers on these topics.	<input type="checkbox"/>
CoC has worked with ESG recipient(s) to adopt uniform anti-discrimination policies for all subrecipients.	<input checked="" type="checkbox"/>

CoC has worked with ESG recipient(s) to identify both CoC and ESG funded facilities within the CoC geographic area that may be out of compliance, and taken steps to work directly with those facilities to come into compliance.	<input type="checkbox"/>
CoC has sought assistance from HUD through submitting AAQs or requesting TA to resolve non-compliance of service providers.	<input type="checkbox"/>

3B-2.4. Strategy for Addressing Needs of Unaccompanied Youth Experiencing Homelessness. Applicants must indicate whether the CoC's strategy to address the unique needs of unaccompanied homeless youth includes the following:

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-2.5. Prioritizing Unaccompanied Youth Experiencing Homelessness Based on Needs. Applicants must check all that apply from the list below that describes the CoC's current strategy to prioritize unaccompanied youth based on their needs.

History or Vulnerability to Victimization (e.g., domestic violence, sexual assault, childhood abuse)	<input checked="" type="checkbox"/>
Number of Previous Homeless Episodes	<input checked="" type="checkbox"/>
Unsheltered Homelessness	<input checked="" type="checkbox"/>
Criminal History	<input checked="" type="checkbox"/>
Bad Credit or Rental History	<input checked="" type="checkbox"/>

3B-2.6. Applicants must describe the CoC's strategy to increase:
(1) housing and services for all youth experiencing homelessness by providing new resources or more effectively using existing resources, including securing additional funding; and
(2) availability of housing and services for youth experiencing unsheltered homelessness by providing new resources or more effectively using existing resources.
(limit 3,000 characters)

The CoC has several strategies for increasing housing and services for all youth experiencing homelessness, including unsheltered youth. First, the CoC prioritized PH Bonus projects for RRH for youth in its FY 2018 new project application, resulting in the selection of a new TH-RRH project for youth aged 18 – 24 in the FY 2018 Priority Listing. The project would provide up to 3 months of temporary housing for youth at any given time as they are provided housing location assistance and enrolled in the RRH component. The project applicant is an existing CoC-funded RRH provider, so this would expand their

capacity. The project would have the capacity to enroll unsheltered youth directly from the street or other unsheltered locations, thereby freeing up limited shelter beds and decreasing their LOT homeless. Applicants would not be screened out on the basis of rental, credit or criminal histories. Second, the Collaborative Applicant increased funding for Housing 101, a program that provides rental assistance and counseling to former foster care youth. Youth in Housing 101 that become homeless are directly connected to CES. Third, the CoC created formal partnerships with two dedicated youth shelters located outside of the CoC where youth can go if they are found unsheltered and are unable to be diverted or Rapidly Re-Housed immediately. Fourth, the CoC increased funding for youth housing and services by securing additional philanthropic grants through the Your Way Home Funding Collaborative to provide flexible funding for SO to divert doubled-up youth from becoming street homeless and for RRH providers to help youth and young parents aged 18 – 24 pay move-in costs and purchase beds & household goods. Fifth, the CoC partners with the County Office of Children & Youth, who participate in BNL meetings in order to identify youth who could benefit from their services, including the provision of hotel vouchers for unsheltered youth under 21 when shelter is not available.

3B-2.6a. Applicants must:

(1) provide evidence the CoC uses to measure both strategies in question 3B-2.6. to increase the availability of housing and services for youth experiencing homelessness;

(2) describe the measure(s) the CoC uses to calculate the effectiveness of the strategies; and

(3) describe why the CoC believes the measure it uses is an appropriate way to determine the effectiveness of the CoC's strategies.

(limit 3,000 characters)

The CoC uses PIT Count and HMIS data, including CES, Street Outreach, Emergency Shelter and Rapid Re-Housing project data, to measure the efficacy of strategies to increase housing and services for all youth experiencing homelessness, including unsheltered youth. Zero unsheltered youth were found during the 2018 PIT Count, which is why the CoC is currently prioritizing increased housing and services for youth that are housing unstable, in shelter, facing eviction or aging out of foster care. Specific HMIS data elements used by the CoC include Coordinated Entry VI-SPDAT assessment results, Emergency Shelter enrollment, Rapid Re-Housing enrollment and exits to permanent housing, and returns to homelessness, all by age. Through the PH Bonus grant for TH-RRH for youth aged 18 – 24, the CoC hopes to build on the success of its existing CoC-funded dedicated RRH for youth, through which 71% of program participants have exited to permanent housing over the past two years. The CoC believes these are effective measures for both strategies because they are based on measures used successfully for other populations experiencing homelessness, yet are also customized for youth. The PIT Count methodology includes outreach to locations where unsheltered youth might congregate. When the CoC created a dedicated RRH project for youth, it ensured HMIS data reports would effectively measure performance. However the CoC is also committed to improving its strategies for measuring the effectiveness of youth-focused housing and services. This coming year, the CoC will establish a Youth Advisory Board to engage youth with the lived experience of homelessness and their education, health and human service

providers to inform future PIT Count and HMIS data collection, analysis and strategy design to the CoC Governing Board. In addition, the CoC is undertaking an Equity study that will have as one priority the question of equitable access and outcomes for LGBTQ youth.

3B-2.7. Collaboration–Education Services. Applicants must describe how the CoC collaborates with:

- (1) youth education providers;**
 - (2) McKinney-Vento State Education Agency (SEA) and Local Education Agency (LEA);**
 - (3) school districts; and**
 - (4) the formal partnerships with (1) through (3) above.**
- (limit 2,000 characters)**

The CoC has a formal MOU with the Montgomery County Intermediate Unit (MCIU) to prioritize children aged 3-5 experiencing homelessness who are enrolled in CoC programs for Head Start and Early Head Start pre-school programs. The McKinney-Vento LEA serves on the CoC Governing Board. Both a local School District Superintendent and the Executive Director of the MCIU serve on the PA-504 Your Way Home Advisory Council, a 25-member group of community leaders that provide input to the CoC Governing Board. The CoC has positioned itself to expand efforts into homelessness prevention work by targeting families and individuals at risk for homelessness. Based on national research conducted by Barbara Poppe for the CoC through a contract with a local health foundation, the CoC has launched The Sprout Initiative, a school-based homelessness prevention program that works to stabilize families with young children who are imminently at risk of becoming homeless by providing social services and housing stability supports. Sprout is funded by the CoC's Your Way Home philanthropic Funders Collaborative. The ultimate goal of Sprout is to demonstrate that stable housing can lead to better educational outcomes among vulnerable children. Sprout provides housing stability services for the family, while coordinating support for the child in order to increase key educational outcomes. Housing stability services include case management and rental assistance. The initiative uses a 2-Generation approach to coordinating care holistically for parents and children. Families are identified through a formal partnership with a local school district, including identification meetings with McKinney-Vento liaisons and regular meetings with home and school visitors, school counselors, and teachers. If successful, the CoC hopes to replicate the project in other school districts throughout its geographic area.

3B-2.7a. Applicants must describe the policies and procedures the CoC adopted to inform individuals and families who become homeless of their eligibility for education services.

(limit 2,000 characters)

Through the CoC's MOU with the Montgomery County Intermediate Unit (MCIU), CoC Rapid Re-Housing providers are able to refer families directly to the MCIU Family Engagement Teams in the public school district in which the family resides or plans to reside. Family Engagement Team members prioritize CoC program participants for entry into Head Start and Early Head Start programs. Families are informed of their eligibility for services through verbal and written contact in their preferred language or other mode of communication.

Families then communicate directly with their Family Engagement Team member to accept services and have the right to actively participate in all decision making in the initiation of services. Additionally, through the CoC's Sprout Initiative demonstration project, a formal partnership has been developed with the North Penn School District allowing CoC case managers to team up with district staff and work with families experiencing or at risk of homelessness together. The McKinney-Vento liaison for the district identify families they believe to be most vulnerable on their caseload. The liaison then conducts outreach to the families through verbal and written contact in their preferred language or other mode of communication. Those families are then connected to CoC providers for case management and housing assistance using a Rapid Re-Housing program model and a progressive engagement approach. The CoC has partnered with Villanova University to evaluate the efficacy of the demonstration project in hopes of scaling it to other school districts in the CoC's geographic area.

3B-2.8. Does the CoC have written formal agreements, MOU/MOAs or partnerships with one or more providers of early childhood services and supports? Select "Yes" or "No". Applicants must select "Yes" or "No", from the list below, if the CoC has written formal agreements, MOU/MOA's or partnerships with providers of early childhood services and support.

	MOU/MOA	Other Formal Agreement
Early Childhood Providers	No	No
Head Start	Yes	No
Early Head Start	Yes	No
Child Care and Development Fund	No	No
Federal Home Visiting Program	No	No
Healthy Start	No	No
Public Pre-K	No	No
Birth to 3 years	Yes	No
Tribal Home Visting Program	No	No
Other: (limit 50 characters)		
County Office of Children and Youth	Yes	No
County Office of Child Care Services	Yes	No

3B-3.1. Veterans Experiencing Homelessness. Applicants must describe the actions the CoC has taken to identify, assess, and refer Veterans experiencing homelessness, who are eligible for U.S. Department of Veterans Affairs (VA) housing and services, to appropriate resources such as HUD-VASH, Supportive Services for Veterans Families (SSVF) program and Grant and Per Diem (GPD). (limit 2,000 characters)

All persons who may be veterans are referred by non-VA funded organizations to the Montgomery County Office of Veterans Affairs' Homeless Outreach Coordinator. The Outreach Coordinator is the local contact responsible for ensuring that veterans receive appropriate services. The Outreach Coordinator refers all veterans to the VA Medical Center Outreach Coordinator for paperwork processing within the VA's databases to determine eligibility for VA

programs, including VASH & SSVF. All homeless veterans' cases are reviewed biweekly during the Veteran's Boot Camp meeting, chaired by the Office of Veterans Affairs' Homeless Outreach Coordinator and attended by all local VA service coordinators, including the SSVF grantee, the PHA that processes the CoC's VASH vouchers, & the CoC Your Way Home Program Manager. The team reviews eligibility and referral status for all vets on the registry to ensure that they are connected and enrolled into the services for which they are eligible.

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 experiencing homelessness is assisted to quickly move into permanent housing using a Housing First approach? Yes

3B-5. Racial Disparity. Applicants must: Yes
(1) indicate whether the CoC assessed whether there are racial disparities in the provision or outcome of homeless assistance;
(2) if the CoC conducted an assessment, attach a copy of the summary.

3B-5a. Applicants must select from the options below the results of the CoC's assessment.

People of different races or ethnicities are more or less likely to receive homeless assistance.	<input checked="" type="checkbox"/>
People of different races or ethnicities are more or less likely to receive a positive outcome from homeless assistance.	<input type="checkbox"/>
There are no racial disparities in the provision or outcome of homeless assistance.	<input type="checkbox"/>
The results are inconclusive for racial disparities in the provision or outcome of homeless assistance.	<input checked="" type="checkbox"/>

3B-5b. Applicants must select from the options below the strategies the CoC is using to address any racial disparities.

The CoC's board and decisionmaking bodies are representative of the population served in the CoC.	<input type="checkbox"/>
The CoC has identified steps it will take to help the CoC board and decisionmaking bodies better reflect the population served in the CoC.	<input checked="" type="checkbox"/>
The CoC is expanding outreach in geographic areas with higher concentrations of underrepresented groups.	<input checked="" type="checkbox"/>
The CoC has communication, such as flyers, websites, or other materials, inclusive of underrepresented groups	<input checked="" type="checkbox"/>
The CoC is training staff working in the homeless services sector to better understand racism and the intersection of racism and homelessness.	<input checked="" type="checkbox"/>
The CoC is establishing professional development opportunities to identify and invest in emerging leaders of different races and ethnicities in the homelessness sector.	<input checked="" type="checkbox"/>
The CoC has staff, committees or other resources charged with analyzing and addressing racial disparities related to homelessness.	<input checked="" type="checkbox"/>
The CoC is educating organizations, stakeholders, boards of directors for local and national non-profit organizations working on homelessness on the topic of creating greater racial and ethnic diversity.	<input checked="" type="checkbox"/>
The CoC reviewed coordinated entry processes to understand their impact on people of different races and ethnicities experiencing homelessness.	<input checked="" type="checkbox"/>
The CoC is collecting data to better understand the pattern of program use for people of different races and ethnicities in its homeless services system.	<input checked="" type="checkbox"/>
The CoC is conducting additional research to understand the scope and needs of different races or ethnicities experiencing homelessness.	<input checked="" type="checkbox"/>
Other:	<input type="checkbox"/>

4A. Continuum of Care (CoC) Accessing Mainstream Benefits and Additional Policies

Instructions:

For guidance on completing this application, please reference the FY 2018 CoC Application Detailed Instructions and the FY 2018 CoC Program Competition NOFA. Please submit technical questions to the HUD Exchange Ask A Question.

4A-1. Healthcare. Applicants must indicate, for each type of healthcare listed below, whether the CoC:

- (1) assists persons experiencing homelessness with enrolling in health insurance; and
- (2) assists persons experiencing homelessness with effectively utilizing Medicaid and other benefits.

Type of Health Care	Assist with Enrollment	Assist with Utilization of Benefits?
Public Health Care Benefits (State or Federal benefits, Medicaid, Indian Health Services)	Yes	Yes
Private Insurers:	No	No
Non-Profit, Philanthropic:	Yes	Yes
Other: (limit 50 characters)		

4A-1a. Mainstream Benefits. Applicants must:

- (1) describe how the CoC works with mainstream programs that assist persons experiencing homelessness to apply for and receive mainstream benefits;
- (2) describe how the CoC systematically keeps program staff up-to-date regarding mainstream resources available for persons experiencing homelessness (e.g., Food Stamps, SSI, TANF, substance abuse programs); and
- (3) provide the name of the organization or position title that is responsible for overseeing the CoC's strategy for mainstream benefits. (limit 2,000 characters)

The Montgomery County Office of Housing & Community Development (OHCD), the CoC Collaborative Applicant, coordinates access to mainstream benefits for CoC funded projects and people experiencing homelessness. The Collaborative Applicant contracts with one non-CoC funded nonprofit service provider that is a certified ACA Navigator to deliver health insurance and SOAR enrollment to homeless persons. The Collaborative Applicant also contracts with a separate non-CoC funded nonprofit service provider of financial literacy and counseling services that helps any CoC program participant increase their savings and credit scores, reduce debt and obtain previously unclaimed public benefits. All CoC project staff are trained in how to identify the need for and connect program participants to mainstream and community benefit programs,

including SNAP, SSI, child care subsidies, physical, mental and oral health services for un/underinsured households and substance abuse recovery services, among others. CoC project staff are updated by OHCD about new benefit programs through quarterly in-service meetings and monthly email newsletters. The CoC also maintains a regularly updated, comprehensive list of all mainstream and community benefit service providers, including detailed eligibility requirements and contact information. Through the Your Way Home partnership and philanthropic Funders Collaborative that supports the CoC, CoC providers have access to flexible financial assistance for program participants that can pay for transportation to health and public benefit service appointments, emergency medical costs and job training program fees and equipment.

4A-2.Housing First: Applicants must report:

- (1) total number of new and renewal CoC Program Funded PSH, RRH, SSO non-coordinated entry, Safe-Haven, and Transitional Housing projects the CoC is applying for in FY 2018 CoC Program Competition; and**
- (2) total number of new and renewal CoC Program Funded PSH, RRH, SSO non-coordinated entry, Safe-Haven, and Transitional Housing projects the CoC is applying for in FY 2018 CoC Program Competition that have adopted the Housing First approach—meaning that the project quickly houses clients without preconditions or service participation requirements.**

Total number of new and renewal CoC Program Funded PSH, RRH, SSO non-coordinated entry, Safe-Haven, and Transitional Housing projects the CoC is applying for in FY 2018 CoC Program Competition.	19
Total number of new and renewal CoC Program Funded PSH, RRH, SSO non-coordinated entry, Safe-Haven, and Transitional Housing projects the CoC is applying for in FY 2018 CoC Program Competition that have adopted the Housing First approach—meaning that the project quickly houses clients without preconditions or service participation requirements.	19
Percentage of new and renewal PSH, RRH, Safe-Haven, SSO non-Coordinated Entry projects in the FY 2018 CoC Program Competition that will be designated as Housing First.	100%

4A-3. Street Outreach. Applicants must:

- (1) describe the CoC's outreach;**
- (2) state whether the CoC's Street Outreach covers 100 percent of the CoC's geographic area;**
- (3) describe how often the CoC conducts street outreach; and**
- (4) describe how the CoC tailored its street outreach to persons experiencing homelessness who are least likely to request assistance. (limit 2,000 characters)**

In 2018, the Collaborative Applicant awarded the CoC's Street Outreach project to a new provider with significant expertise in mobile crisis response, mental health issues, substance abuse and trauma-informed care. The Collaborative Applicant expanded Street Outreach services to a 24/7 team that has the capacity to travel everywhere in the CoC's geographic area. In addition to providing 100% coverage in the CoC's geographic area, Street Outreach makes weekly visits to places where people living unsheltered often sleep or congregate. The Street Outreach Team places great emphasis on engagement and building rapport with hard-to-reach populations, through provision of survival items, empathetic listening and motivational interviewing. Street Outreach workers collect as much HMIS-related information as people are

willing to provide, and will update their client record over time as greater trust is built. Street Outreach also fosters strong relationships with local police departments, hospitals, and other providers that often have first contact unsheltered homeless individuals, in order to better locate individuals who may need assistance but have been reluctant to engage with the CoC's Coordinated Entry System. If necessary, Street Outreach can conduct the CoC's VI-SPDAT coordinated assessment rather than the 211 Call Center. Street Outreach workers also conduct part of the CoC's PIT Count training and lead its PIT Count field teams. The CoC's Your Way Home Funder Collaborative has also awarded significant philanthropic grant funds to the Street Outreach team to provide hotel vouchers for families with children and pregnant women living on the street when shelter beds are full.

4A-4. Affirmative Outreach. Applicants must describe:

(1) the specific strategy the CoC 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; and

(2) how the CoC communicated effectively with persons with disabilities and limited English proficiency fair housing strategy in (1) above.

(limit 2,000 characters)

The CoC and its funded providers comply with the nondiscrimination and equal opportunity provisions of Federal civil rights laws as specified at 24 C.F.R. 5.105(a), including, but not limited to the Fair Housing Act prohibits discriminatory housing practices based on race, color, religion, sex, national origin, disability, or familial status; Section 504 of the Rehabilitation Act prohibits discrimination on the basis of disability under any program or activity receiving Federal financial assistance; Title VI of the Civil Rights Act prohibits discrimination on the basis of race, color or national origin under any program or activity receiving Federal financial assistance; and Title II of the Americans with Disabilities Act which prohibits public entities from discriminating against individuals with disabilities in all their services, programs, and activities, which include housing, and housing-related services such as housing search and referral assistance. In addition, the CoC complies with HUD's Equal Access Rule at 24 CFR 5.105(a)(2) which prohibits discriminatory eligibility determinations in HUD-assisted or HUD-insured housing programs based on actual or perceived sexual orientation, gender identity, or marital status. The CoC affirmatively furthers fair housing through the following strategies: 1) annual fair housing trainings for all CoC members and ongoing distribution of materials and guidance from the Housing Equality Center, a regional fair housing advocacy organization and, 2) the Collaborative Applicant's CoC Program Manager's enforcement of 24 CFR 578.93(c) through regular monitoring of housing and supportive service providers. The Program Manager also works with non-CoC Latino/Hispanic community and disability service providers to conduct culturally relevant outreach. The CoC Coordinated Entry System's 211 Call Center has language line access for anyone who speaks English as a Second Language and access for people who are Deaf or Hard of Hearing.

4A-5. RRH Beds as Reported in the HIC. Applicants must report the total

FY2018 CoC Application	Page 41	09/18/2018
------------------------	---------	------------

number of rapid rehousing beds available to serve all household types as reported in the Housing Inventory Count (HIC) for 2017 and 2018.

	2017	2018	Difference
RRH beds available to serve all populations in the HIC	255	368	113

4A-6. Rehabilitation or New Construction Costs. Are new proposed project applications requesting \$200,000 or more in funding for housing rehabilitation or new construction? No

4A-7. Homeless under Other Federal Statutes. Is the CoC requesting to designate one or more of its SSO or TH projects to serve families with children or youth defined as homeless under other Federal statutes? 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>

Document Type	Required?	Document Description	Date Attached
1C-5. PHA Administration Plan–Homeless Preference	No	MCHA Administrati...	09/14/2018
1C-5. PHA Administration Plan–Move-on Multifamily Assisted Housing Owners' Preference	No		
1C-8. Centralized or Coordinated Assessment Tool	Yes	PA-504 CE Assessm...	09/14/2018
1E-1. Objective Criteria–Rate, Rank, Review, and Selection Criteria (e.g., scoring tool, matrix)	Yes	PA-504 CoC FY 201...	09/14/2018
1E-3. Public Posting CoC-Approved Consolidated Application	Yes	PA-504 Consolidat...	09/17/2018
1E-3. Public Posting–Local Competition Rate, Rank, Review, and Selection Criteria (e.g., RFP)	Yes	PA-504 Public Pos...	09/17/2018
1E-4. CoC's Reallocation Process	Yes	PA-504 CoC FY 201...	09/14/2018
1E-5. Notifications Outside e-snaps–Projects Accepted	Yes	PA-504 Projects A...	09/17/2018
1E-5. Notifications Outside e-snaps–Projects Rejected or Reduced	Yes	PA-504 Project Re...	09/14/2018
1E-5. Public Posting–Local Competition Deadline	Yes	PA-504 Local Comp...	09/14/2018
2A-1. CoC and HMIS Lead Governance (e.g., section of Governance Charter, MOU, MOA)	Yes	PA-504 CoC and HM...	09/18/2018
2A-2. HMIS–Policies and Procedures Manual	Yes	PA-504 HMIS Polic...	09/14/2018
3A-6. HDX–2018 Competition Report	Yes	PA-504 FY 2018 Co...	09/14/2018
3B-2. Order of Priority–Written Standards	No	PA-504 Order of P...	09/14/2018

3B-5. Racial Disparities Summary	No	PA-504 Racial Equ...	09/14/2018
4A-7.a. Project List–Persons Defined as Homeless under Other Federal Statutes (if applicable)	No		
Other	No		
Other	No		
Other	No		

Attachment Details

Document Description: MCHA Administrative Plan Homeless Preference

Attachment Details

Document Description:

Attachment Details

Document Description: PA-504 CE Assessment Tool

Attachment Details

Document Description: PA-504 CoC FY 2018 Rating and Ranking
Procedure

Attachment Details

Document Description: PA-504 Consolidated Application

Attachment Details

Document Description: PA-504 Public Posting Selections, Ranking and CoC Application

Attachment Details

Document Description: PA-504 CoC FY 2018 Process For Reallocation

Attachment Details

Document Description: PA-504 Projects Accepted Notification

Attachment Details

Document Description: PA-504 Project Reduction Notification

Attachment Details

Document Description: PA-504 Local Competition Deadline

Attachment Details

Document Description: PA-504 CoC and HMIS Lead Governance

Attachment Details

Document Description: PA-504 HMIS Policy and Procedures Manual

Attachment Details

Document Description: PA-504 FY 2018 CoC Competition Report

Attachment Details

Document Description: PA-504 Order of Priority-Written Standards

Attachment Details

Document Description: PA-504 Racial Equity Assessment 2018

Attachment Details

Document Description:

Attachment Details

Document Description:

Attachment Details

Document Description:

Attachment Details

Document Description:

Submission Summary

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

Page	Last Updated
1A. Identification	09/17/2018
1B. Engagement	09/17/2018
1C. Coordination	09/17/2018
1D. Discharge Planning	09/17/2018
1E. Project Review	09/17/2018
2A. HMIS Implementation	09/17/2018
2B. PIT Count	09/17/2018
2C. Sheltered Data - Methods	09/17/2018
3A. System Performance	09/17/2018
3B. Performance and Strategic Planning	09/17/2018
4A. Mainstream Benefits and Additional Policies	09/17/2018
4B. Attachments	09/18/2018

FY2018 CoC Application	Page 49	09/18/2018
------------------------	---------	------------

Submission Summary

No Input Required

MONTGOMERY COUNTY
HOUSING AUTHORITY

HOUSING CHOICE VOUCHER PROGRAM
ADMINISTRATIVE PLAN

Adopted: September 2017

subject family is eligible for Housing Choice Voucher Program housing assistance.

g) A Public Housing resident with a disability or with a household member with a disability may be granted admission to Housing Choice Voucher Program waiting list at any time as a reasonable accommodation. A Public Housing resident placed on the HCVP waiting list as a reasonable accommodation will be placed on the waiting list with 3 preference points. The voucher may be limited for units that would satisfy the purpose of the accommodation. Public Housing residents seeking placement on the HCVP waiting list as a reasonable accommodation will be advised that the MCHA is not responsible for modifying units assisted through the Housing Choice Voucher Program and that the MCHA cannot require landlords on the Program to modify their units at the landlord's expense.

h) Veteran preference: for head or spouse who is active members of the military, veterans or surviving spouses or household members of deceased veterans.

i) The MCHA provides 60 preferences of 8 points for homeless households identified as most vulnerable by and referred to the MCHA through Your Way Home Montgomery County. The preferences will be reused if and when the household holding the preference is no longer a HCVP participant.

j) The MCHA provides a preference of 10 points to any Public Housing household requesting and qualifying for an emergency transfer under VAWA who opts to receive a voucher rather than a transfer. A household qualifies for an emergency transfer under VAWA if (1) a household member is a victim of domestic violence, dating violence, sexual assault, or stalking, and (2) the household requests an emergency transfer because (a) the tenant/participant reasonably believes that there is a threat of imminent harm from further violence if the participant remains in the current unit or (b) the household member was the victim of a sexual assault and the sexual assault occurred in the assisted unit. \

k) The MCHA provides 10 preference points for transfers from other MCHA-administered programs deemed necessary by the MCHA due to planned development or redevelopment activities.

4. Issuing or Denying Vouchers

a) The Voucher of Family Participation shall expire at the end of sixty (60) days.

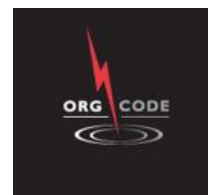
**Vulnerability Index -
Service Prioritization Decision Assistance Tool
(VI-SPDAT)**

Prescreen Triage Tool for Families

AMERICAN VERSION 2.0

©2015 OrgCode Consulting Inc. and Community Solutions. All rights reserved.
1 (800) 355-0420 info@orgcode.com www.orgcode.com

**COMMUNITY
SOLUTIONS**



Welcome to the SPDAT Line of Products

The Service Prioritization Decision Assistance Tool (SPDAT) has been around in various incarnations for over a decade, before being released to the public in 2010. Since its initial release, the use of the SPDAT has been expanding exponentially and is now used in over one thousand communities across the United States, Canada, and Australia.

More communities using the tool means there is an unprecedented demand for versions of the SPDAT, customized for specific client groups or types of users. With the release of SPDAT V4, there have been more current versions of SPDAT products than ever before.

VI-SPDAT Series

The Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT) was developed as a pre-screening tool for communities that are very busy and do not have the resources to conduct a full SPDAT assessment for every client. It was made in collaboration with Community Solutions, creators of the Vulnerability Index, as a brief survey that can be conducted to quickly determine whether a client has high, moderate, or low acuity. The use of this survey can help prioritize which clients should be given a full SPDAT assessment first. Because it is a self-reported survey, no special training is required to use the VI-SPDAT.

Current versions available:

- VI-SPDAT V 2.0 for Individuals
- VI-SPDAT V 2.0 for Families
- VI-SPDAT V 2.0 for Youth

All versions are available online at

www.orgcode.com/products/vi-spdatt/

SPDAT Series

The Service Prioritization Decision Assistance Tool (SPDAT) was developed as an assessment tool for front-line workers at agencies that work with homeless clients to prioritize which of those clients should receive assistance first. The SPDAT tools are also designed to help guide case management and improve housing stability outcomes. They provide an in-depth assessment that relies on the assessor's ability to interpret responses and corroborate those with evidence. As a result, this tool may only be used by those who have received proper, up-to-date training provided by OrgCode Consulting, Inc. or an OrgCode certified trainer.

Current versions available:

- SPDAT V 4.0 for Individuals
- SPDAT V 4.0 for Families
- SPDAT V 4.0 for Youth

Information about all versions is available online at

www.orgcode.com/products/spdat/

SPDAT Training Series

To use the SPDAT, training by OrgCode or an OrgCode certified trainer is required. We provide training on a wide variety of topics over a variety of mediums.

The full-day in-person SPDAT Level 1 training provides you the opportunity to bring together as many people as you want to be trained for one low fee. The webinar training allows for a maximum of 15 different computers to be logged into the training at one time. We also offer online courses for individuals that you can do at your own speed.

The training gives you the manual, case studies, application to current practice, a review of each component of the tool, conversation guidance with prospective clients – and more!

Current SPDAT training available:

- Level 0 SPDAT Training: VI-SPDAT for Frontline Workers
- Level 1 SPDAT Training: SPDAT for Frontline Workers
- Level 2 SPDAT Training: SPDAT for Supervisors
- Level 3 SPDAT Training: SPDAT for Trainers

Other related training available:

- Excellence in Housing-Based Case Management
- Coordinated Access & Common Assessment
- Motivational Interviewing
- Objective-Based Interactions

More information about SPDAT training, including pricing, is available online at

<http://www.orgcode.com/product-category/training/spdat/>

Administration

Interviewer's Name	Agency	<input type="checkbox"/> Team <input type="checkbox"/> Staff <input type="checkbox"/> Volunteer
_____	_____	
Survey Date	Survey Time	Survey Location
DD/MM/YYYY ____/____/____	____:____	_____

Opening Script

Every assessor in your community regardless of organization completing the VI-SPDAT should use the same introductory script. In that script you should highlight the following information:

- the name of the assessor and their affiliation (organization that employs them, volunteer as part of a Point in Time Count, etc.)
- the purpose of the VI-SPDAT being completed
- that it usually takes less than 7 minutes to complete
- that only "Yes," "No," or one-word answers are being sought
- that any question can be skipped or refused
- where the information is going to be stored
- that if the participant does not understand a question that clarification can be provided
- the importance of relaying accurate information to the assessor and not feeling that there is a correct or preferred answer that they need to provide, nor information they need to conceal

Basic Information

PARENT 1	First Name	Nickname	Last Name
	_____	_____	_____
	In what language do you feel best able to express yourself? _____		
	Date of Birth	Age	Social Security Number
	DD/MM/YYYY ____/____/____	_____	_____
			Consent to participate
			<input type="checkbox"/> Yes <input type="checkbox"/> No
PARENT 2	<input type="checkbox"/> No second parent currently part of the household		
	First Name	Nickname	Last Name
	_____	_____	_____
	In what language do you feel best able to express yourself? _____		
	Date of Birth	Age	Social Security Number
	DD/MM/YYYY ____/____/____	_____	_____
			Consent to participate
			<input type="checkbox"/> Yes <input type="checkbox"/> No
IF EITHER HEAD OF HOUSEHOLD IS 60 YEARS OF AGE OR OLDER, THEN SCORE 1.			SCORE:
			<input type="text"/>

Children

1. How many children under the age of 18 are currently with you? _____ ☐ Refused
2. How many children under the age of 18 are not currently with your family, but you have reason to believe they will be joining you when you get housed? _____ ☐ Refused
3. **IF HOUSEHOLD INCLUDES A FEMALE:** Is any member of the family currently pregnant? ☐ Y ☐ N ☐ Refused
4. Please provide a list of children's names and ages:

First Name	Last Name	Age	Date of Birth
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

IF THERE IS A SINGLE PARENT WITH 2+ CHILDREN, AND/OR A CHILD AGED 11 OR YOUNGER, AND/OR A CURRENT PREGNANCY, THEN SCORE 1 FOR **FAMILY SIZE**.

SCORE:

IF THERE ARE TWO PARENTS WITH 3+ CHILDREN, AND/OR A CHILD AGED 6 OR YOUNGER, AND/OR A CURRENT PREGNANCY, THEN SCORE 1 FOR **FAMILY SIZE**.

A. History of Housing and Homelessness

5. Where do you and your family sleep most frequently? (check one)
 - ☐ Shelters
 - ☐ Transitional Housing
 - ☐ Safe Haven
 - ☐ **Outdoors**
 - ☐ **Other (specify):** _____
 - ☐ Refused

IF THE PERSON ANSWERS ANYTHING OTHER THAN "SHELTER", "TRANSITIONAL HOUSING", OR "SAFE HAVEN", THEN SCORE 1.

SCORE:

6. How long has it been since you and your family lived in permanent stable housing? _____ ☐ Refused
7. In the last three years, how many times have you and your family been homeless? _____ ☐ Refused

IF THE FAMILY HAS EXPERIENCED 1 OR MORE CONSECUTIVE YEARS OF HOMELESSNESS, AND/OR 4+ EPISODES OF HOMELESSNESS, THEN SCORE 1.

SCORE:

B. Risks

8. In the past six months, how many times have you or anyone in your family...

- a) Received health care at an emergency department/room? ____ ☐ Refused
- b) Taken an ambulance to the hospital? ____ ☐ Refused
- c) Been hospitalized as an inpatient? ____ ☐ Refused
- d) Used a crisis service, including sexual assault crisis, mental health crisis, family/intimate violence, distress centers and suicide prevention hotlines? ____ ☐ Refused
- e) Talked to police because they witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told them that they must move along? ____ ☐ Refused
- f) Stayed one or more nights in a holding cell, jail or prison, whether that was a short-term stay like the drunk tank, a longer stay for a more serious offence, or anything in between? ____ ☐ Refused

IF THE TOTAL NUMBER OF INTERACTIONS EQUALS 4 OR MORE, THEN SCORE 1 FOR **EMERGENCY SERVICE USE.**

SCORE:

9. Have you or anyone in your family been attacked or beaten up since they've become homeless? ☐ Y ☐ N ☐ Refused
10. Have you or anyone in your family threatened to or tried to harm themselves or anyone else in the last year? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **RISK OF HARM.**

SCORE:

11. Do you or anyone in your family have any legal stuff going on right now that may result in them being locked up, having to pay fines, or that make it more difficult to rent a place to live? ☐ Y ☐ N ☐ Refused

IF "YES," THEN SCORE 1 FOR **LEGAL ISSUES.**

SCORE:

12. Does anybody force or trick you or anyone in your family to do things that you do not want to do? ☐ Y ☐ N ☐ Refused
13. Do you or anyone in your family ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone they don't know, share a needle, or anything like that? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **RISK OF EXPLOITATION.**

SCORE:

C. Socialization & Daily Functioning

14. Is there any person, past landlord, business, bookie, dealer, or government group like the IRS that thinks you or anyone in your family owe them money? ☐ **Y** ☐ **N** ☐ Refused

15. Do you or anyone in your family get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that? ☐ **Y** ☒ **N** ☐ Refused

IF "YES" TO QUESTION 14 OR "NO" TO QUESTION 15, THEN SCORE 1 FOR **MONEY MANAGEMENT**.

SCORE:

16. Does everyone in your family have planned activities, other than just surviving, that make them feel happy and fulfilled? ☐ **Y** ☒ **N** ☐ Refused

IF "NO," THEN SCORE 1 FOR **MEANINGFUL DAILY ACTIVITY**.

SCORE:

17. Is everyone in your family currently able to take care of basic needs like bathing, changing clothes, using a restroom, getting food and clean water and other things like that? ☐ **Y** ☒ **N** ☐ Refused

IF "NO," THEN SCORE 1 FOR **SELF-CARE**.

SCORE:

18. Is your family's current homelessness in any way caused by a relationship that broke down, an unhealthy or abusive relationship, or because other family or friends caused your family to become evicted? ☐ **Y** ☐ **N** ☐ Refused

IF "YES," THEN SCORE 1 FOR **SOCIAL RELATIONSHIPS**.

SCORE:

D. Wellness

19. Has your family ever had to leave an apartment, shelter program, or other place you were staying because of the physical health of you or anyone in your family? ☐ **Y** ☐ **N** ☐ Refused

20. Do you or anyone in your family have any chronic health issues with your liver, kidneys, stomach, lungs or heart? ☐ **Y** ☐ **N** ☐ Refused

21. If there was space available in a program that specifically assists people that live with HIV or AIDS, would that be of interest to you or anyone in your family? ☐ **Y** ☐ **N** ☐ Refused

22. Does anyone in your family have any physical disabilities that would limit the type of housing you could access, or would make it hard to live independently because you'd need help? ☐ **Y** ☐ **N** ☐ Refused

23. When someone in your family is sick or not feeling well, does your family avoid getting medical help? ☐ **Y** ☐ **N** ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **PHYSICAL HEALTH**.

SCORE:

VULNERABILITY INDEX - SERVICE PRIORITIZATION DECISION ASSISTANCE TOOL (VI-SPDAT)

FAMILIES

AMERICAN VERSION 2.0

24. Has drinking or drug use by you or anyone in your family led your family to being kicked out of an apartment or program where you were staying in the past? ☐ Y ☐ N ☐ Refused

25. Will drinking or drug use make it difficult for your family to stay housed or afford your housing? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **SUBSTANCE USE**.

SCORE:

26. Has your family ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of:

a) A mental health issue or concern? ☐ Y ☐ N ☐ Refused

b) A past head injury? ☐ Y ☐ N ☐ Refused

c) A learning disability, developmental disability, or other impairment? ☐ Y ☐ N ☐ Refused

27. Do you or anyone in your family have any mental health or brain issues that would make it hard for your family to live independently because help would be needed? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **MENTAL HEALTH**.

SCORE:

28. **IF THE FAMILY SCORED 1 EACH FOR PHYSICAL HEALTH, SUBSTANCE USE, AND MENTAL HEALTH:** Does any single member of your household have a medical condition, mental health concerns, **and** experience with problematic substance use? ☐ Y ☐ N ☐ N/A or Refused

IF "YES", SCORE 1 FOR **TRI-MORBIDITY**.

SCORE:

29. Are there any medications that a doctor said you or anyone in your family should be taking that, for whatever reason, they are not taking? ☐ Y ☐ N ☐ Refused

30. Are there any medications like painkillers that you or anyone in your family don't take the way the doctor prescribed or where they sell the medication? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, SCORE 1 FOR **MEDICATIONS**.

SCORE:

31. **YES OR NO:** Has your family's current period of homelessness been caused by an experience of emotional, physical, psychological, sexual, or other type of abuse, or by any other trauma you or anyone in your family have experienced? ☐ Y ☐ N ☐ Refused

IF "YES", SCORE 1 FOR **ABUSE AND TRAUMA**.

SCORE:

E. Family Unit

32. Are there any children that have been removed from the family by a child protection service within the last 180 days? ☐ Y ☐ N ☐ Refused

33. Do you have any family legal issues that are being resolved in court or need to be resolved in court that would impact your housing or who may live within your housing? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, SCORE 1 FOR FAMILY LEGAL ISSUES.

SCORE:

34. In the last 180 days have any children lived with family or friends because of your homelessness or housing situation? ☐ Y ☐ N ☐ Refused

35. Has any child in the family experienced abuse or trauma in the last 180 days? ☐ Y ☐ N ☐ Refused

36. **IF THERE ARE SCHOOL-AGED CHILDREN:** Do your children attend school more often than not each week? ☐ Y ☐ N ☐ N/A or Refused

IF "YES" TO ANY OF QUESTIONS 34 OR 35, OR "NO" TO QUESTION 36, SCORE 1 FOR NEEDS OF CHILDREN.

SCORE:

37. Have the members of your family changed in the last 180 days, due to things like divorce, your kids coming back to live with you, someone leaving for military service or incarceration, a relative moving in, or anything like that? ☐ Y ☐ N ☐ Refused

38. Do you anticipate any other adults or children coming to live with you within the first 180 days of being housed? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, SCORE 1 FOR FAMILY STABILITY.

SCORE:

39. Do you have two or more planned activities each week as a family such as outings to the park, going to the library, visiting other family, watching a family movie, or anything like that? ☐ Y ☐ N ☐ Refused

40. After school, or on weekends or days when there isn't school, is the total time children spend each day where there is no interaction with you or another responsible adult...

a) 3 or more hours per day for children aged 13 or older? ☐ Y ☐ N ☐ Refused

b) 2 or more hours per day for children aged 12 or younger? ☐ Y ☐ N ☐ Refused

41. **IF THERE ARE CHILDREN BOTH 12 AND UNDER & 13 AND OVER:** Do your older kids spend 2 or more hours on a typical day helping their younger sibling(s) with things like getting ready for school, helping with homework, making them dinner, bathing them, or anything like that? ☐ Y ☐ N ☐ N/A or Refused

IF "NO" TO QUESTION 39, OR "YES" TO ANY OF QUESTIONS 40 OR 41, SCORE 1 FOR PARENTAL ENGAGEMENT.

SCORE:

Scoring Summary

DOMAIN	SUBTOTAL	RESULTS
PRE-SURVEY	/2	Score: Recommendation: 0-3 no housing intervention 4-8 an assessment for Rapid Re-Housing 9+ an assessment for Permanent Supportive Housing/Housing First
A. HISTORY OF HOUSING & HOMELESSNESS	/2	
B. RISKS	/4	
C. SOCIALIZATION & DAILY FUNCTIONS	/4	
D. WELLNESS	/6	
E. FAMILY UNIT	/4	
GRAND TOTAL:	/22	

Follow-Up Questions

On a regular day, where is it easiest to find you and what time of day is easiest to do so?	place: _____ time: ____ : ____ or
Is there a phone number and/or email where someone can safely get in touch with you or leave you a message?	phone: (____) _____ - _____ email: _____
Ok, now I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused

Communities are encouraged to think of additional questions that may be relevant to the programs being operated or your specific local context. This may include questions related to:

- military service and nature of discharge
- ageing out of care
- mobility issues
- legal status in country
- income and source of it
- current restrictions on where a person can legally reside
- children that may reside with the adult at some point in the future
- safety planning

Appendix A: About the VI-SPDAT

The HEARTH Act and federal regulations require communities to have an assessment tool for coordinated entry - and the VI-SPDAT and SPDAT meet these requirements. Many communities have struggled to comply with this requirement, which demands an investment of considerable time, resources and expertise. Others are making it up as they go along, using “gut instincts” in lieu of solid evidence. Communities need a practical, evidence-informed way to satisfy federal regulations while quickly implementing an effective approach to access and assessment. The VI-SPDAT is a first-of-its-kind tool designed to fill this need, helping communities end homelessness in a quick, strategic fashion.

The VI-SPDAT

The VI-SPDAT was initially created by combining the elements of the Vulnerability Index which was created and implemented by Community Solutions broadly in the 100,000 Homes Campaign, and the SPDAT Prescreen Instrument that was part of the Service Prioritization Decision Assistance Tool. The combination of these two instruments was performed through extensive research and development, and testing. The development process included the direct voice of hundreds of persons with lived experience.

The VI-SPDAT examines factors of current vulnerability and future housing stability. It follows the structure of the SPDAT assessment tool, and is informed by the same research backbone that supports the SPDAT - almost 300 peer reviewed published journal articles, government reports, clinical and quasi-clinical assessment tools, and large data sets. The SPDAT has been independently tested, as well as internally reviewed. The data overwhelmingly shows that when the SPDAT is used properly, housing outcomes are better than when no assessment tool is used.

The VI-SPDAT is a triage tool. It highlights areas of higher acuity, thereby helping to inform the type of support and housing intervention that may be most beneficial to improve long term housing outcomes. It also helps inform the order - or priority - in which people should be served. The VI-SPDAT does not make decisions; it informs decisions. The VI-SPDAT provides data that communities, service providers, and people experiencing homelessness can use to help determine the best course of action next.

Version 2

Version 2 builds upon the success of Version 1 of the VI-SPDAT with some refinements. Starting in August 2014, a survey was launched of existing VI-SPDAT users to get their input on what should be amended, improved, or maintained in the tool. Analysis was completed across all of these responses. Further research was conducted. Questions were tested and refined over several months, again including the direct voice of persons with lived experience and frontline practitioners. Input was also gathered from senior government officials that create policy and programs to help ensure alignment with guidelines and funding requirements.

You will notice some differences in Version 2 compared to Version 1. Namely:

- it is shorter, usually taking less than 7 minutes to complete;
- subjective elements through observation are now gone, which means the exact same instrument can be used over the phone or in-person;
- medical, substance use, and mental health questions are all refined;
- you can now explicitly see which component of the full SPDAT each VI-SPDAT question links to; and,
- the scoring range is slightly different (Don't worry, we can provide instructions on how these relate to results from Version 1).

Since the VI-SPDAT is provided completely free of charge, and no training is required, any community is able to use the VI-SPDAT without the explicit permission of Community Solutions or OrgCode Consulting, Inc. As a result, the VI-SPDAT is being used in more communities than we know of. It is also being used in Canada and Australia.



A partial list of continua of care (CoCs) in the US where we know the VI-SPDAT is being used includes:

Alabama

- Parts of Alabama Balance of State

Arizona

- Statewide

California

- San Jose/Santa Clara City & County
- San Francisco
- Oakland/Alameda County
- Sacramento City & County
- Richmond/Contra Costa County
- Watsonville/Santa Cruz City & County
- Fresno/Madera County
- Napa City & County
- Los Angeles City & County
- San Diego
- Santa Maria/Santa Barbara County
- Bakersfield/Kern County
- Pasadena
- Riverside City & County
- Glendale
- San Luis Obispo County

Colorado

- Metropolitan Denver Homeless Initiative
- Parts of Colorado Balance of State

Connecticut

- Hartford
- Bridgeport/Stratford/Fairfield
- Connecticut Balance of State
- Norwalk/Fairfield County
- Stamford/Greenwich
- City of Waterbury

District of Columbia

- District of Columbia

Florida

- Sarasota/Bradenton/Manatee, Sarasota Counties
- Tampa/Hillsborough County
- St. Petersburg/Clearwater/Largo/Pinellas County
- Tallahassee/Leon County
- Orlando/Orange, Osceola, Seminole Counties
- Gainesville/Alachua, Putnam Counties
- Jacksonville-Duval, Clay Counties
- Palm Bay/Melbourne/Brevard County
- Ocala/Marion County
- Miami/Dade County
- West Palm Beach/Palm Beach County

Georgia

- Atlanta County
- Fulton County
- Columbus-Muscogee/Russell County
- Marietta/Cobb County
- DeKalb County

Hawaii

- Honolulu

Illinois

- Rockford/Winnebago, Boone Counties
- Waukegan/North Chicago/Lake County
- Chicago
- Cook County

Iowa

- Parts of Iowa Balance of State

Kansas

- Kansas City/Wyandotte County

Kentucky

- Louisville/Jefferson County

Louisiana

- Lafayette/Acadiana
- Shreveport/Bossier/Northwest
- New Orleans/Jefferson Parish
- Baton Rouge
- Alexandria/Central Louisiana CoC

Massachusetts

- Cape Cod Islands
- Springfield/Holyoke/Chicopee/Westfield/Hampden County

Maryland

- Baltimore City
- Montgomery County

Maine

- Statewide

Michigan

- Statewide

Minnesota

- Minneapolis/Hennepin County
- Northwest Minnesota
- Moorhead/West Central Minnesota
- Southwest Minnesota

Missouri

- St. Louis County
- St. Louis City
- Joplin/Jasper, Newton Counties
- Kansas City/Independence/Lee's Summit/Jackson County
- Parts of Missouri Balance of State

Mississippi

- Jackson/Rankin, Madison Counties
- Gulf Port/Gulf Coast Regional

North Carolina

- Winston Salem/Forsyth County
- Asheville/Buncombe County
- Greensboro/High Point

North Dakota

- Statewide

Nebraska

- Statewide

New Mexico

- Statewide

Nevada

- Las Vegas/Clark County

New York

- New York City
- Yonkers/Mount Vernon/New Rochelle/Westchester County
- Toledo/Lucas County
- Canton/Massillon/Alliance/Stark County

Ohio

- Toledo/Lucas County
- Canton/Massillon/Alliance/Stark County
- Tulsa City & County/Broken Arrow
- Oklahoma City
- Norman/Cleveland County

Pennsylvania

- Philadelphia
- Lower Marion/Norristown/Abington/Montgomery County
- Allentown/Northeast Pennsylvania
- Lancaster City & County
- Bristol/Bensalem/Bucks County
- Pittsburgh/McKeesport/Penn Hills/Allegheny County

Rhode Island

- Statewide

South Carolina

- Charleston/Low Country
- Columbia/Midlands

Tennessee

- Chattanooga/Southeast Tennessee
- Memphis/Shelby County
- Nashville/Davidson County

Texas

- San Antonio/Bexar County
- Austin/Travis County
- Dallas City & County/Irving
- Fort Worth/Arlington/Tarrant County
- El Paso City and County
- Waco/McLennan County
- Texas Balance of State
- Amarillo
- Wichita Falls/Wise, Palo Pinto, Wichita, Archer Counties
- Bryan/College Station/Brazos Valley
- Beaumont/Port Arthur/South East Texas

Utah

- Statewide

Virginia

- Richmond/Henrico, Chesterfield, Hanover Counties
- Roanoke City & County/Salem
- Virginia Beach
- Portsmouth
- Virginia Balance of State
- Arlington County

Washington

- Seattle/King County
- Spokane City & County

Wisconsin

- Statewide

West Virginia

- Statewide

Wyoming

- Wyoming Statewide is in the process of implementing

**Vulnerability Index -
Service Prioritization Decision Assistance Tool
(VI-SPDAT)**

Prescreen Triage Tool for Single Adults

AMERICAN VERSION 2.01

©2015 OrgCode Consulting Inc. and Community Solutions. All rights reserved.
1 (800) 355-0420 info@orgcode.com www.orgcode.com

**COMMUNITY
SOLUTIONS**



Welcome to the SPDAT Line of Products

The Service Prioritization Decision Assistance Tool (SPDAT) has been around in various incarnations for over a decade, before being released to the public in 2010. Since its initial release, the use of the SPDAT has been expanding exponentially and is now used in over one thousand communities across the United States, Canada, and Australia.

More communities using the tool means there is an unprecedented demand for versions of the SPDAT, customized for specific client groups or types of users. With the release of SPDAT V4, there have been more current versions of SPDAT products than ever before.

VI-SPDAT Series

The Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT) was developed as a pre-screening tool for communities that are very busy and do not have the resources to conduct a full SPDAT assessment for every client. It was made in collaboration with Community Solutions, creators of the Vulnerability Index, as a brief survey that can be conducted to quickly determine whether a client has high, moderate, or low acuity. The use of this survey can help prioritize which clients should be given a full SPDAT assessment first. Because it is a self-reported survey, no special training is required to use the VI-SPDAT.

Current versions available:

- VI-SPDAT V 2.0 for Individuals
- VI-SPDAT V 2.0 for Families
- VI-SPDAT V 1.0 for Youth

All versions are available online at

www.orgcode.com/products/vi-spdats/

SPDAT Series

The Service Prioritization Decision Assistance Tool (SPDAT) was developed as an assessment tool for front-line workers at agencies that work with homeless clients to prioritize which of those clients should receive assistance first. The SPDAT tools are also designed to help guide case management and improve housing stability outcomes. They provide an in-depth assessment that relies on the assessor's ability to interpret responses and corroborate those with evidence. As a result, this tool may only be used by those who have received proper, up-to-date training provided by OrgCode Consulting, Inc. or an OrgCode certified trainer.

Current versions available:

- SPDAT V 4.0 for Individuals
- SPDAT V 2.0 for Families
- SPDAT V 1.0 for Youth

Information about all versions is available online at

www.orgcode.com/products/spdat/

SPDAT Training Series

To use the SPDAT, training by OrgCode or an OrgCode certified trainer is required. We provide training on a wide variety of topics over a variety of mediums.

The full-day in-person SPDAT Level 1 training provides you the opportunity to bring together as many people as you want to be trained for one low fee. The webinar training allows for a maximum of 15 different computers to be logged into the training at one time. We also offer online courses for individuals that you can do at your own speed.

The training gives you the manual, case studies, application to current practice, a review of each component of the tool, conversation guidance with prospective clients – and more!

Current SPDAT training available:

- Level 0 SPDAT Training: VI-SPDAT for Frontline Workers
- Level 1 SPDAT Training: SPDAT for Frontline Workers
- Level 2 SPDAT Training: SPDAT for Supervisors
- Level 3 SPDAT Training: SPDAT for Trainers

Other related training available:

- Excellence in Housing-Based Case Management
- Coordinated Access & Common Assessment
- Motivational Interviewing
- Objective-Based Interactions

More information about SPDAT training, including pricing, is available online at

<http://www.orgcode.com/product-category/training/spdat/>

Administration

Interviewer's Name _____	Agency _____	<input type="checkbox"/> Team <input type="checkbox"/> Staff <input type="checkbox"/> Volunteer
Survey Date DD/MM/YYYY ____/____/____	Survey Time ____	Survey Location _____

Opening Script

Every assessor in your community regardless of organization completing the VI-SPDAT should use the same introductory script. In that script you should highlight the following information:

- the name of the assessor and their affiliation (organization that employs them, volunteer as part of a Point in Time Count, etc.)
- the purpose of the VI-SPDAT being completed
- that it usually takes less than 7 minutes to complete
- that only "Yes," "No," or one-word answers are being sought
- that any question can be skipped or refused
- where the information is going to be stored
- that if the participant does not understand a question or the assessor does not understand the question that clarification can be provided
- the importance of relaying accurate information to the assessor and not feeling that there is a correct or preferred answer that they need to provide, nor information they need to conceal

Basic Information

First Name _____	Nickname _____	Last Name _____
In what language do you feel best able to express yourself? _____		
Date of Birth DD/MM/YYYY ____/____/____	Age _____	Social Security Number _____
		Consent to participate <input type="checkbox"/> Yes <input type="checkbox"/> No

IF THE PERSON IS 60 YEARS OF AGE OR OLDER, THEN SCORE 1.

SCORE:

A. History of Housing and Homelessness

1. Where do you sleep most frequently? (check one)

- ☐ Shelters
☐ Transitional Housing
☐ Safe Haven
☐ **Outdoors**
☐ **Other (specify):** _____

☐ **Refused**

IF THE PERSON ANSWERS ANYTHING OTHER THAN "SHELTER", "TRANSITIONAL HOUSING", OR "SAFE HAVEN", THEN SCORE 1.

SCORE:

2. How long has it been since you lived in permanent stable housing? _____

☐ Refused

3. In the last three years, how many times have you been homeless? _____

☐ Refused

IF THE PERSON HAS EXPERIENCED 1 OR MORE CONSECUTIVE YEARS OF HOMELESSNESS, AND/OR 4+ EPISODES OF HOMELESSNESS, THEN SCORE 1.

SCORE:

B. Risks

4. In the past six months, how many times have you...

a) Received health care at an emergency department/room? _____

☐ Refused

b) Taken an ambulance to the hospital? _____

☐ Refused

c) Been hospitalized as an inpatient? _____

☐ Refused

d) Used a crisis service, including sexual assault crisis, mental health crisis, family/intimate violence, distress centers and suicide prevention hotlines? _____

☐ Refused

e) Talked to police because you witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told you that you must move along? _____

☐ Refused

f) Stayed one or more nights in a holding cell, jail or prison, whether that was a short-term stay like the drunk tank, a longer stay for a more serious offence, or anything in between? _____

☐ Refused

IF THE TOTAL NUMBER OF INTERACTIONS EQUALS 4 OR MORE, THEN SCORE 1 FOR EMERGENCY SERVICE USE.

SCORE:

5. Have you been attacked or beaten up since you've become homeless? _____

☐ Y ☐ N ☐ Refused

6. Have you threatened to or tried to harm yourself or anyone else in the last year? _____

☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF HARM.

SCORE:

7. Do you have any legal stuff going on right now that may result in you being locked up, having to pay fines, or that make it more difficult to rent a place to live? ☐ Y ☐ N ☐ Refused

IF "YES," THEN SCORE 1 FOR **LEGAL ISSUES**.

SCORE:

8. Does anybody force or trick you to do things that you do not want to do? ☐ Y ☐ N ☐ Refused

9. Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **RISK OF EXPLOITATION**.

SCORE:

C. Socialization & Daily Functioning

10. Is there any person, past landlord, business, bookie, dealer, or government group like the IRS that thinks you owe them money? ☐ Y ☐ N ☐ Refused

11. Do you get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that? ☐ Y ☐ N ☐ Refused

IF "YES" TO QUESTION 10 OR "NO" TO QUESTION 11, THEN SCORE 1 FOR **MONEY MANAGEMENT**.

SCORE:

12. Do you have planned activities, other than just surviving, that make you feel happy and fulfilled? ☐ Y ☐ N ☐ Refused

IF "NO," THEN SCORE 1 FOR **MEANINGFUL DAILY ACTIVITY**.

SCORE:

13. Are you currently able to take care of basic needs like bathing, changing clothes, using a restroom, getting food and clean water and other things like that? ☐ Y ☐ N ☐ Refused

IF "NO," THEN SCORE 1 FOR **SELF-CARE**.

SCORE:

14. Is your current homelessness in any way caused by a relationship that broke down, an unhealthy or abusive relationship, or because family or friends caused you to become evicted? ☐ Y ☐ N ☐ Refused

IF "YES," THEN SCORE 1 FOR **SOCIAL RELATIONSHIPS**.

SCORE:

D. Wellness

15. Have you ever had to leave an apartment, shelter program, or other place you were staying because of your physical health? ☐ Y ☐ N ☐ Refused
16. Do you have any chronic health issues with your liver, kidneys, stomach, lungs or heart? ☐ Y ☐ N ☐ Refused
17. If there was space available in a program that specifically assists people that live with HIV or AIDS, would that be of interest to you? ☐ Y ☐ N ☐ Refused
18. Do you have any physical disabilities that would limit the type of housing you could access, or would make it hard to live independently because you'd need help? ☐ Y ☐ N ☐ Refused
19. When you are sick or not feeling well, do you avoid getting help? ☐ Y ☐ N ☐ Refused
20. **FOR FEMALE RESPONDENTS ONLY:** Are you currently pregnant? ☐ Y ☐ N ☐ N/A or Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **PHYSICAL HEALTH**.

SCORE:

21. Has your drinking or drug use led you to being kicked out of an apartment or program where you were staying in the past? ☐ Y ☐ N ☐ Refused
22. Will drinking or drug use make it difficult for you to stay housed or afford your housing? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **SUBSTANCE USE**.

SCORE:

23. Have you ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of:
- a) A mental health issue or concern? ☐ Y ☐ N ☐ Refused
- b) A past head injury? ☐ Y ☐ N ☐ Refused
- c) A learning disability, developmental disability, or other impairment? ☐ Y ☐ N ☐ Refused
24. Do you have any mental health or brain issues that would make it hard for you to live independently because you'd need help? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **MENTAL HEALTH**.

SCORE:

IF THE RESPONDENT SCORED 1 FOR **PHYSICAL HEALTH** AND 1 FOR **SUBSTANCE USE** AND 1 FOR **MENTAL HEALTH**, SCORE 1 FOR **TRI-MORBIDITY**.

SCORE:

25. Are there any medications that a doctor said you should be taking that, for whatever reason, you are not taking? ☐ Y ☐ N ☐ Refused

26. Are there any medications like painkillers that you don't take the way the doctor prescribed or where you sell the medication? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, SCORE 1 FOR MEDICATIONS.

SCORE:

27. **YES OR NO:** Has your current period of homelessness been caused by an experience of emotional, physical, psychological, sexual, or other type of abuse, or by any other trauma you have experienced? ☐ Y ☐ N ☐ Refused

IF "YES", SCORE 1 FOR ABUSE AND TRAUMA.

SCORE:

Scoring Summary

DOMAIN	SUBTOTAL	RESULTS
PRE-SURVEY	/1	Score: Recommendation: 0-3: no housing intervention 4-7: an assessment for Rapid Re-Housing 8+: an assessment for Permanent Supportive Housing/Housing First
A. HISTORY OF HOUSING & HOMELESSNESS	/2	
B. RISKS	/4	
C. SOCIALIZATION & DAILY FUNCTIONS	/4	
D. WELLNESS	/6	
GRAND TOTAL:	/17	

Follow-Up Questions

On a regular day, where is it easiest to find you and what time of day is easiest to do so?	place: _____ time: ____ : ____ or
Is there a phone number and/or email where someone can safely get in touch with you or leave you a message?	phone: (____) _____ - _____ email: _____
Ok, now I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused

Communities are encouraged to think of additional questions that may be relevant to the programs being operated or your specific local context. This may include questions related to:

- military service and nature of discharge
- ageing out of care
- mobility issues
- legal status in country
- income and source of it
- current restrictions on where a person can legally reside
- children that may reside with the adult at some point in the future
- safety planning

Appendix A: About the VI-SPDAT

The HEARTH Act and federal regulations require communities to have an assessment tool for coordinated entry - and the VI-SPDAT and SPDAT meet these requirements. Many communities have struggled to comply with this requirement, which demands an investment of considerable time, resources and expertise. Others are making it up as they go along, using “gut instincts” in lieu of solid evidence. Communities need practical, evidence-informed tools that enhance their ability to satisfy federal regulations and quickly implement an effective approach to access and assessment. The VI-SPDAT is a first-of-its-kind tool designed to fill this need, helping communities end homelessness in a quick, strategic fashion.

The VI-SPDAT

The VI-SPDAT was initially created by combining the elements of the Vulnerability Index which was created and implemented by Community Solutions broadly in the 100,000 Homes Campaign, and the SPDAT Prescreen Instrument that was part of the Service Prioritization Decision Assistance Tool. The combination of these two instruments was performed through extensive research and development, and testing. The development process included the direct voice of hundreds of persons with lived experience.

The VI-SPDAT examines factors of current vulnerability and future housing stability. It follows the structure of the SPDAT assessment tool, and is informed by the same research backbone that supports the SPDAT - almost 300 peer reviewed published journal articles, government reports, clinical and quasi-clinical assessment tools, and large data sets. The SPDAT has been independently tested, as well as internally reviewed. The data overwhelmingly shows that when the SPDAT is used properly, housing outcomes are better than when no assessment tool is used.

The VI-SPDAT is a triage tool. It highlights areas of higher acuity, thereby helping to inform the type of support and housing intervention that may be most beneficial to improve long term housing outcomes. It also helps inform the order - or priority - in which people should be served. The VI-SPDAT does not make decisions; it informs decisions. The VI-SPDAT provides data that communities, service providers, and people experiencing homelessness can use to help determine the best course of action next.

Version 2

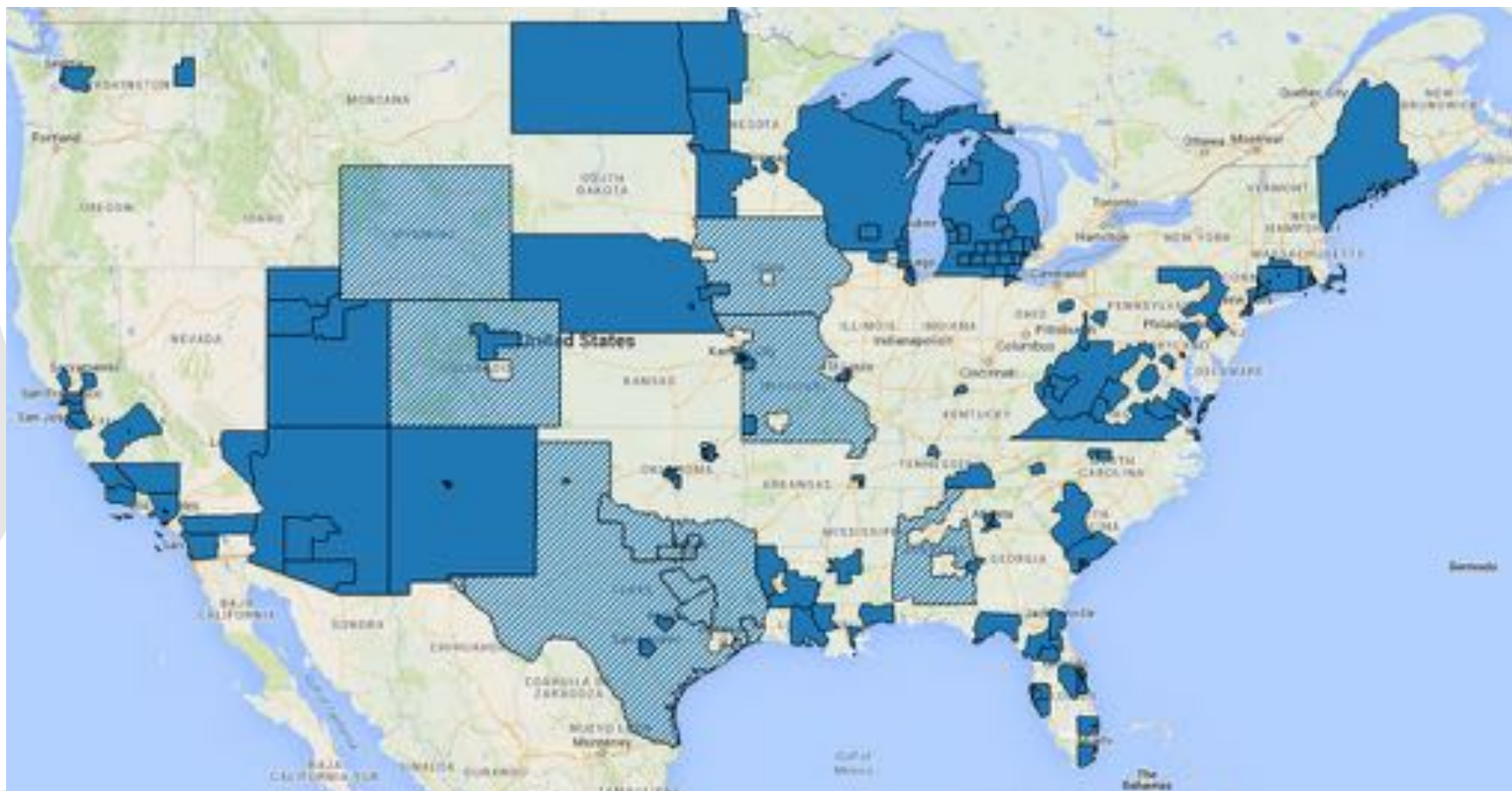
Version 2 builds upon the success of Version 1 of the VI-SPDAT with some refinements. Starting in August 2014, a survey was launched of existing VI-SPDAT users to get their input on what should be amended, improved, or maintained in the tool. Analysis was completed across all of these responses. Further research was conducted. Questions were tested and refined over several months, again including the direct voice of persons with lived experience and frontline practitioners. Input was also gathered from senior government officials that create policy and programs to help ensure alignment with guidelines and funding requirements.

You will notice some differences in Version 2 compared to Version 1. Namely:

- it is shorter, usually taking less than 7 minutes to complete;
- subjective elements through observation are now gone, which means the exact same instrument can be used over the phone or in-person;
- medical, substance use, and mental health questions are all refined;
- you can now explicitly see which component of the full SPDAT each VI-SPDAT question links to; and,
- the scoring range is slightly different (Don't worry, we can provide instructions on how these relate to results from Version 1).

Appendix B: Where the VI-SPDAT is being used in the United States

Since the VI-SPDAT is provided completely free of charge, and no training is required, any community is able to use the VI-SPDAT without the explicit permission of Community Solutions or OrgCode Consulting, Inc. As a result, the VI-SPDAT is being used in more communities than we know of. It is also being used in Canada and Australia.



A partial list of continua of care (CoCs) in the US where we know the VI-SPDAT is being used includes:

Alabama

- Parts of Alabama Balance of State

Arizona

- Statewide

California

- San Jose/Santa Clara City & County
- San Francisco
- Oakland/Alameda County
- Sacramento City & County
- Richmond/Contra Costa County
- Watsonville/Santa Cruz City & County
- Fresno/Madera County
- Napa City & County
- Los Angeles City & County
- San Diego
- Santa Maria/Santa Barbara County
- Bakersfield/Kern County
- Pasadena
- Riverside City & County
- Glendale
- San Luis Obispo County

Colorado

- Metropolitan Denver Homeless Initiative
- Parts of Colorado Balance of State

Connecticut

- Hartford
- Bridgeport/Stratford/Fairfield
- Connecticut Balance of State
- Norwalk/Fairfield County
- Stamford/Greenwich
- City of Waterbury

District of Columbia

- District of Columbia

Florida

- Sarasota/Bradenton/Manatee, Sarasota Counties
- Tampa/Hillsborough County
- St. Petersburg/Clearwater/Largo/Pinellas County
- Tallahassee/Leon County
- Orlando/Orange, Osceola, Seminole Counties
- Gainesville/Alachua, Putnam Counties
- Jacksonville-Duval, Clay Counties
- Palm Bay/Melbourne/Brevard County
- Ocala/Marion County
- Miami/Dade County
- West Palm Beach/Palm Beach County

Georgia

- Atlanta County
- Fulton County
- Columbus-Muscogee/Russell County
- Marietta/Cobb County
- DeKalb County

Hawaii

- Honolulu

Illinois

- Rockford/Winnebago, Boone Counties
- Waukegan/North Chicago/Lake County
- Chicago
- Cook County

Iowa

- Parts of Iowa Balance of State

Kansas

- Kansas City/Wyandotte County

Kentucky

- Louisville/Jefferson County

Louisiana

- Lafayette/Acadiana
- Shreveport/Bossier/Northwest
- New Orleans/Jefferson Parish
- Baton Rouge
- Alexandria/Central Louisiana CoC

Massachusetts

- Cape Cod Islands
- Springfield/Holyoke/Chicopee/Westfield/Hampden County

Maryland

- Baltimore City
- Montgomery County

Maine

- Statewide

Michigan

- Statewide

Minnesota

- Minneapolis/Hennepin County
- Northwest Minnesota
- Moorhead/West Central Minnesota
- Southwest Minnesota

Missouri

- St. Louis County
- St. Louis City
- Joplin/Jasper, Newton Counties
- Kansas City/Independence/Lee's Summit/Jackson County
- Parts of Missouri Balance of State

Mississippi

- Jackson/Rankin, Madison Counties
- Gulf Port/Gulf Coast Regional

North Carolina

- Winston Salem/Forsyth County
- Asheville/Buncombe County
- Greensboro/High Point

North Dakota

- Statewide

Nebraska

- Statewide

New Mexico

- Statewide

Nevada

- Las Vegas/Clark County

New York

- New York City
- Yonkers/Mount Vernon/New Rochelle/Westchester County

Ohio

- Toledo/Lucas County
- Canton/Massillon/Alliance/Stark County

Oklahoma

- Tulsa City & County/Broken Arrow
- Oklahoma City
- Norman/Cleveland County

Pennsylvania

- Philadelphia
- Lower Marion/Norristown/Abington/Montgomery County
- Allentown/Northeast Pennsylvania
- Lancaster City & County
- Bristol/Bensalem/Bucks County
- Pittsburgh/McKeesport/Penn Hills/Allegheny County

Rhode Island

- Statewide

South Carolina

- Charleston/Low Country
- Columbia/Midlands

Tennessee

- Chattanooga/Southeast Tennessee
- Memphis/Shelby County
- Nashville/Davidson County

Texas

- San Antonio/Bexar County
- Austin/Travis County
- Dallas City & County/Irving
- Fort Worth/Arlington/Tarrant County
- El Paso City and County
- Waco/McLennan County
- Texas Balance of State
- Amarillo
- Wichita Falls/Wise, Palo Pinto, Wichita, Archer Counties
- Bryan/College Station/Brazos Valley
- Beaumont/Port Arthur/South East Texas

Utah

- Statewide

Virginia

- Richmond/Henrico, Chesterfield, Hanover Counties
- Roanoke City & County/Salem
- Virginia Beach
- Portsmouth
- Virginia Balance of State
- Arlington County

Washington

- Seattle/King County
- Spokane City & County

Wisconsin

- Statewide

West Virginia

- Statewide

Wyoming

- Wyoming Statewide is in the process of implementing

**Transition Age Youth -
Vulnerability Index -
Service Prioritization Decision Assistance Tool
(TAY-VI-SPDAT)**

“Next Step Tool for Homeless Youth”

AMERICAN VERSION 1.0

©2015 OrgCode Consulting Inc., Corporation for Supportive Housing,
Community Solutions, and Eric Rice, USC School of Social Work. All rights reserved.
1 (800) 355-0420 info@orgcode.com www.orgcode.com

**COMMUNITY
SOLUTIONS**



Eric Rice, PhD
USC
SCHOOL OF
SOCIAL WORK



Welcome to the SPDAT Line of Products

The Service Prioritization Decision Assistance Tool (SPDAT) has been around in various incarnations for over a decade, before being released to the public in 2010. Since its initial release, the use of the SPDAT has been expanding exponentially and is now used in over one thousand communities across the United States, Canada, and Australia.

More communities using the tool means there is an unprecedented demand for versions of the SPDAT, customized for specific client groups or types of users. With the release of SPDAT V4, there have been more current versions of SPDAT products than ever before.

VI-SPDAT Series

The Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT) was developed as a pre-screening tool for communities that are very busy and do not have the resources to conduct a full SPDAT assessment for every client. It was made in collaboration with Community Solutions, creators of the Vulnerability Index, as a brief survey that can be conducted to quickly determine whether a client has high, moderate, or low acuity. The use of this survey can help prioritize which clients should be given a full SPDAT assessment first. Because it is a self-reported survey, no special training is required to use the VI-SPDAT.

Current versions available:

- VI-SPDAT V 2.0
- Family VI-SPDAT V 2.0
- Next Step Tool for Homeless Youth V 1.0

All versions are available online at

www.orgcode.com/products/vi-spdatt/

SPDAT Series

The Service Prioritization Decision Assistance Tool (SPDAT) was developed as an assessment tool for front-line workers at agencies that work with homeless clients to prioritize which of those clients should receive assistance first. The SPDAT tools are also designed to help guide case management and improve housing stability outcomes. They provide an in-depth assessment that relies on the assessor's ability to interpret responses and corroborate those with evidence. As a result, this tool may only be used by those who have received proper, up-to-date training provided by OrgCode Consulting, Inc. or an OrgCode certified trainer.

Current versions available:

- SPDAT V 4.0 for Individuals
- F-SPDAT V 2.0 for Families
- Y-SPDAT V 1.0 for Youth

Information about all versions is available online at

www.orgcode.com/products/spdat/

SPDAT Training Series

To use the SPDAT assessment product, training by OrgCode or an OrgCode certified trainer is required. We provide training on a wide variety of topics over a variety of mediums.

The full-day in-person SPDAT Level 1 training provides you the opportunity to bring together as many people as you want to be trained for one low fee. The webinar training allows for a maximum of 15 different computers to be logged into the training at one time. We also offer online courses for individuals that you can do at your own speed.

The training gives you the manual, case studies, application to current practice, a review of each component of the tool, conversation guidance with prospective clients – and more!

Current SPDAT training available:

- Level 0 SPDAT Training: VI-SPDAT for Frontline Workers
- Level 1 SPDAT Training: SPDAT for Frontline Workers
- Level 2 SPDAT Training: SPDAT for Supervisors
- Level 3 SPDAT Training: SPDAT for Trainers

Other related training available:

- Excellence in Housing-Based Case Management
- Coordinated Access & Common Assessment
- Motivational Interviewing
- Objective-Based Interactions

More information about SPDAT training, including pricing, is available online at

<http://www.orgcode.com/product-category/training/spdat/>

The TAY-VI-SPDAT – The Next Step Tool for Homeless Youth

OrgCode Consulting, Inc. and Community Solutions joined forces with the Corporation for Supportive Housing (CSH) to combine the best parts of products and expertise to create one streamlined triage tool designed specifically for youth aged 24 or younger.

Administration

Interviewer's Name _____	Agency _____	<input type="checkbox"/> Team <input type="checkbox"/> Staff <input type="checkbox"/> Volunteer
Survey Date DD/MM/YYYY ____/____/____	Survey Time ____:____	Survey Location _____

Opening Script

Every assessor in your community regardless of organization completing the VI-SPDAT should use the same introductory script. In that script you should highlight the following information:

- the name of the assessor and their affiliation (organization that employs them, volunteer as part of a Point in Time Count, etc.)
- the purpose of the VI-SPDAT being completed
- that it usually takes less than 7 minutes to complete
- that only "Yes," "No," or one-word answers are being sought
- that any question can be skipped or refused
- where the information is going to be stored
- that if the participant does not understand a question that clarification can be provided
- the importance of relaying accurate information to the assessor and not feeling that there is a correct or preferred answer that they need to provide, nor information they need to conceal

Basic Information

First Name _____	Nickname _____	Last Name _____
In what language do you feel best able to express yourself? _____		
Date of Birth DD/MM/YYYY ____/____/____	Age _____	Social Security Number _____
		Consent to participate <input type="checkbox"/> Yes <input type="checkbox"/> No

IF THE PERSON IS 17 YEARS OF AGE OR LESS, THEN SCORE 1.

SCORE:

A. History of Housing and Homelessness

1. Where do you sleep most frequently? (check one)

- ☐ Shelters ☐ Couch surfing ☐ Other (specify): _____
☐ Transitional Housing ☐ Outdoors
☐ Safe Haven ☐ Refused

IF THE PERSON ANSWERS ANYTHING OTHER THAN "SHELTER", "TRANSITIONAL HOUSING", OR "SAFE HAVEN", THEN SCORE 1.

SCORE:

2. How long has it been since you lived in permanent stable housing? _____ ☐ Refused

3. In the last three years, how many times have you been homeless? _____ ☐ Refused

IF THE PERSON HAS EXPERIENCED 1 OR MORE CONSECUTIVE YEARS OF HOMELESSNESS, AND/OR 4+ EPISODES OF HOMELESSNESS, THEN SCORE 1.

SCORE:

B. Risks

4. In the past six months, how many times have you...

- a) Received health care at an emergency department/room? _____ ☐ Refused
 b) Taken an ambulance to the hospital? _____ ☐ Refused
 c) Been hospitalized as an inpatient? _____ ☐ Refused
 d) Used a crisis service, including sexual assault crisis, mental health crisis, family/intimate violence, distress centers and suicide prevention hotlines? _____ ☐ Refused
 e) Talked to police because you witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told you that you must move along? _____ ☐ Refused
 f) Stayed one or more nights in a holding cell, jail, prison or juvenile detention, whether it was a short-term stay like the drunk tank, a longer stay for a more serious offence, or anything in between? _____ ☐ Refused

IF THE TOTAL NUMBER OF INTERACTIONS EQUALS 4 OR MORE, THEN SCORE 1 FOR EMERGENCY SERVICE USE.

SCORE:

5. Have you been attacked or beaten up since you've become homeless? ☐ Y ☐ N ☐ Refused

6. Have you threatened to or tried to harm yourself or anyone else in the last year? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF HARM.

SCORE:

7. Do you have any legal stuff going on right now that may result in you being locked up, having to pay fines, or that make it more difficult to rent a place to live? ☐ Y ☐ N ☐ Refused
8. Were you ever incarcerated when younger than age 18? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **LEGAL ISSUES**.

SCORE:

9. Does anybody force or trick you to do things that you do not want to do? ☐ Y ☐ N ☐ Refused
10. Do you ever do things that may be considered to be risky like exchange sex for money, food, drugs, or a place to stay, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that? ☐ Y ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **RISK OF EXPLOITATION**.

SCORE:

C. Socialization & Daily Functioning

11. Is there any person, past landlord, business, bookie, dealer, or government group like the IRS that thinks you owe them money? ☐ Y ☐ N ☐ Refused
12. Do you get any money from the government, an inheritance, an allowance, working under the table, a regular job, or anything like that? ☐ Y ☐ N ☐ Refused

IF "YES" TO QUESTION 11 OR "NO" TO QUESTION 12, THEN SCORE 1 FOR **MONEY MANAGEMENT**.

SCORE:

13. Do you have planned activities, other than just surviving, that make you feel happy and fulfilled? ☐ Y ☐ N ☐ Refused

IF "NO," THEN SCORE 1 FOR **MEANINGFUL DAILY ACTIVITY**.

SCORE:

14. Are you currently able to take care of basic needs like bathing, changing clothes, using a restroom, getting food and clean water and other things like that? ☐ Y ☐ N ☐ Refused

IF "NO," THEN SCORE 1 FOR **SELF-CARE**.

SCORE:

15. Is your current lack of stable housing...

- a) Because you ran away from your family home, a group home or a foster home? ☐ **Y** ☐ N ☐ Refused
- b) Because of a difference in religious or cultural beliefs from your parents, guardians or caregivers? ☐ **Y** ☐ N ☐ Refused
- c) Because your family or friends caused you to become homeless? ☐ **Y** ☐ N ☐ Refused
- d) Because of conflicts around gender identity or sexual orientation? ☐ **Y** ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR SOCIAL RELATIONSHIPS.

SCORE:

- e) Because of violence at home between family members? ☐ **Y** ☐ N ☐ Refused
- f) Because of an unhealthy or abusive relationship, either at home or elsewhere? ☐ **Y** ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR ABUSE/TRAUMA.

SCORE:

D. Wellness

- 16. Have you ever had to leave an apartment, shelter program, or other place you were staying because of your physical health? ☐ **Y** ☐ N ☐ Refused
- 17. Do you have any chronic health issues with your liver, kidneys, stomach, lungs or heart? ☐ **Y** ☐ N ☐ Refused
- 18. If there was space available in a program that specifically assists people that live with HIV or AIDS, would that be of interest to you? ☐ **Y** ☐ N ☐ Refused
- 19. Do you have any physical disabilities that would limit the type of housing you could access, or would make it hard to live independently because you'd need help? ☐ **Y** ☐ N ☐ Refused
- 20. When you are sick or not feeling well, do you avoid getting medical help? ☐ **Y** ☐ N ☐ Refused
- 21. Are you currently pregnant, have you ever been pregnant, or have you ever gotten someone pregnant? ☐ **Y** ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR PHYSICAL HEALTH.

SCORE:

NEXT STEP TOOL FOR HOMELESS YOUTH

SINGLE YOUTH

AMERICAN VERSION 1.0

22. Has your drinking or drug use led you to being kicked out of an apartment or program where you were staying in the past? ☐ **Y** ☐ N ☐ Refused
23. Will drinking or drug use make it difficult for you to stay housed or afford your housing? ☐ **Y** ☐ N ☐ Refused
24. If you've ever used marijuana, did you ever try it at age 12 or younger? ☐ **Y** ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **SUBSTANCE USE**.

SCORE:

25. Have you ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of:

- a) A mental health issue or concern? ☐ **Y** ☐ N ☐ Refused
- b) A past head injury? ☐ **Y** ☐ N ☐ Refused
- c) A learning disability, developmental disability, or other impairment? ☐ **Y** ☐ N ☐ Refused

26. Do you have any mental health or brain issues that would make it hard for you to live independently because you'd need help? ☐ **Y** ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR **MENTAL HEALTH**.

SCORE:

IF THE RESPONENT SCORED 1 FOR **PHYSICAL HEALTH** AND 1 FOR **SUBSTANCE USE** AND 1 FOR **MENTAL HEALTH**, SCORE 1 FOR **TRI-MORBIDITY**.

SCORE:

27. Are there any medications that a doctor said you should be taking that, for whatever reason, you are not taking? ☐ **Y** ☐ N ☐ Refused
28. Are there any medications like painkillers that you don't take the way the doctor prescribed or where you sell the medication? ☐ **Y** ☐ N ☐ Refused

IF "YES" TO ANY OF THE ABOVE, SCORE 1 FOR **MEDICATIONS**.

SCORE:

Scoring Summary

DOMAIN	SUBTOTAL	RESULTS
PRE-SURVEY	/1	Score: Recommendation: 0-3: no moderate or high intensity services be provided at this time 4-7: assessment for time-limited supports with moderate intensity 8+: assessment for long-term housing with high service intensity
A. HISTORY OF HOUSING & HOMELESSNESS	/2	
B. RISKS	/4	
C. SOCIALIZATION & DAILY FUNCTIONS	/5	
D. WELLNESS	/5	
GRAND TOTAL:	/17	

Follow-Up Questions

On a regular day, where is it easiest to find you and what time of day is easiest to do so?	place: _____ time: ____ : ____ or
Is there a phone number and/or email where someone can get in touch with you or leave you a message?	phone: (____) _____ - _____ email: _____
Ok, now I'd like to take your picture so that it is easier to find you and confirm your identity in the future. May I do so?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused

Communities are encouraged to think of additional questions that may be relevant to the programs being operated or your specific local context. This may include questions related to:

- military service and nature of discharge
- ageing out of care
- mobility issues
- legal status in country
- income and source of it
- current restrictions on where a person can legally reside
- children that may reside with the youth at some point in the future
- safety planning

Appendix A: About the TAY-VI-SPDAT

The HEARTH Act and federal regulations require communities to have an assessment tool for coordinated entry - and the VI-SPDAT and SPDAT meet these requirements. Many communities have struggled to comply with this requirement, which demands an investment of considerable time, resources and expertise. Others are making it up as they go along, using “gut instincts” in lieu of solid evidence. Communities need practical, evidence-informed tools that enhance their ability to satisfy federal regulations and quickly implement an effective approach to access and assessment. The VI-SPDAT is a first-of-its-kind tool designed to fill this need, helping communities end homelessness in a quick, strategic fashion.

The VI-SPDAT

The VI-SPDAT was initially created by combining the elements of the Vulnerability Index which was created and implemented by Community Solutions broadly in the 100,000 Homes Campaign, and the SPDAT Prescreen Instrument that was part of the Service Prioritization Decision Assistance Tool. The combination of these two instruments was performed through extensive research and development, and testing. The development process included the direct voice of hundreds of persons with lived experience.

The VI-SPDAT examines factors of current vulnerability and future housing stability. It follows the structure of the SPDAT assessment tool, and is informed by the same research backbone that supports the SPDAT - almost 300 peer reviewed published journal articles, government reports, clinical and quasi-clinical assessment tools, and large data sets. The SPDAT has been independently tested, as well as internally reviewed. The data overwhelmingly shows that when the SPDAT is used properly, housing outcomes are better than when no assessment tool is used.

The VI-SPDAT is a triage tool. It highlights areas of higher acuity, thereby helping to inform the type of support and housing intervention that may be most beneficial to improve long term housing outcomes. It also helps inform the order - or priority - in which people should be served. The VI-SPDAT does not make decisions; it informs decisions. The VI-SPDAT provides data that communities, service providers, and people experiencing homelessness can use to help determine the best course of action next.

The Youth – Transition Age Youth Tool from CSH

Released in May 2013, the Corporation for Supportive Housing (CSH) partnered with Dr. Eric Rice, Assistant Professor at the University of Southern California (USC) School of Social Work, to develop a triage tool that targets homeless Transition Age Youth (TAY) for permanent supportive housing. It consists of six items associated with long-term homelessness (five or more years) among transition-aged youth (age 18-24).

Version 2 of the VI-SPDAT

Version 2 builds upon the success of Version 1 of the VI-SPDAT with some refinements. Starting in August 2014, a survey was launched of existing VI-SPDAT users to get their input on what should be amended, improved, or maintained in the tool.

Analysis was completed across all of these responses. Further research was conducted. Questions were tested and refined over several months, again including the direct voice of persons with lived experience and frontline practitioners. Input was also gathered from senior government officials that create policy and programs to help ensure alignment with guidelines and funding requirements.

The TAY-VI-SPDAT – The Next Step Tool for Homeless Youth

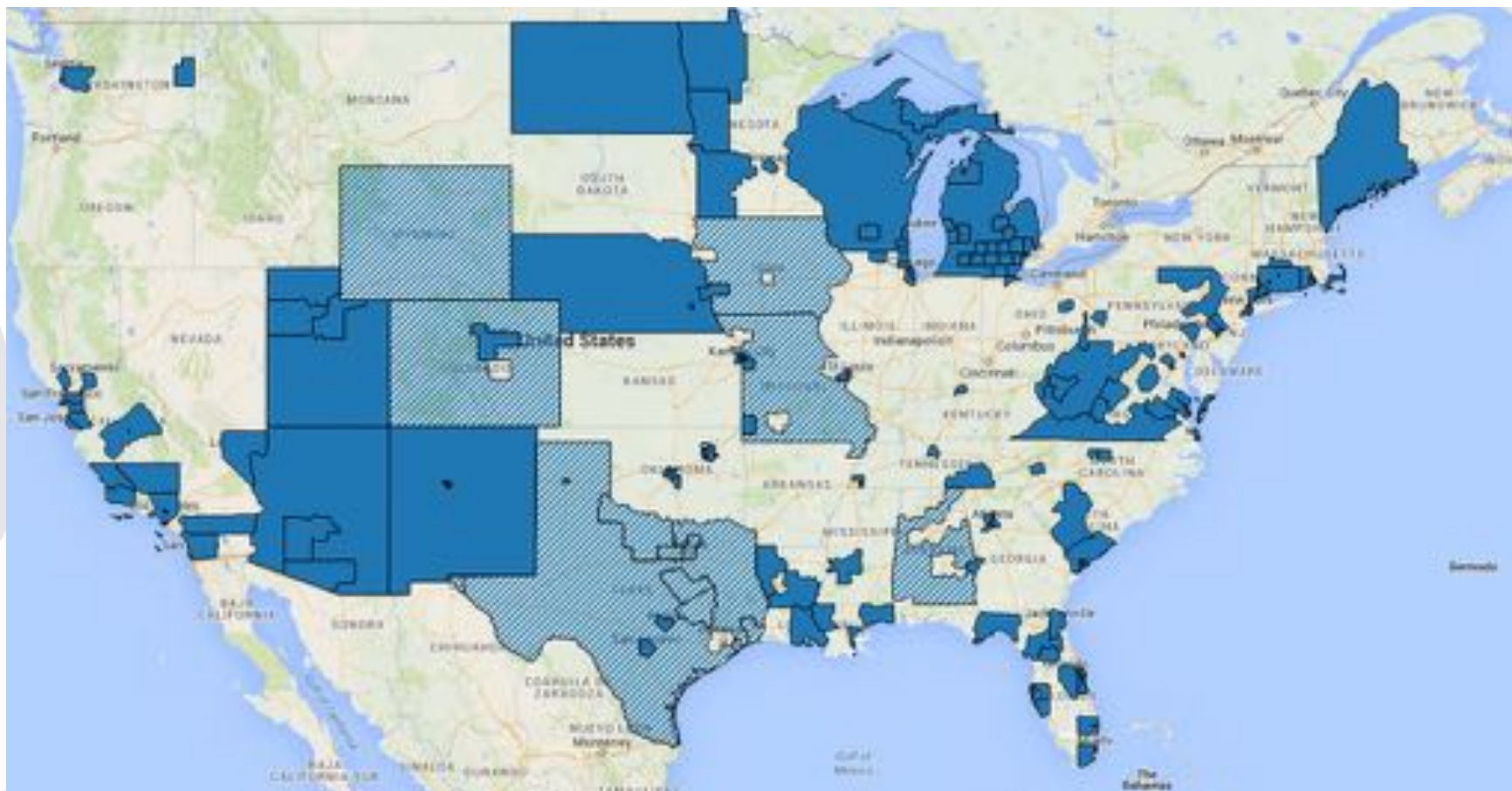
One piece of feedback was the growing concern that youth tended to score lower on the VI-SPDAT, since the Vulnerability Index assesses risk of mortality which is less prevalent among younger populations. So, in version 2 of the VI-SPDAT, OrgCode Consulting, Inc. and Community Solutions joined forces with CSH to combine the best parts of the TAY, the VI, and the SPDAT to create one streamlined triage tool designed specifically for youth aged 24 or younger.

If you are familiar with the VI-SPDAT, you will notice some differences in the TAY-VI-SPDAT compared to VI-SPDAT version 1. Namely:

- it is shorter, usually taking less than 7 minutes to complete;
- subjective elements through observation are now gone, which means the exact same instrument can be used over the phone or in-person;
- medical, substance use, and mental health questions are all refined;
- you can now explicitly see which component of the full SPDAT each VI-SPDAT question links to; and,
- the scoring range is slightly different (Don't worry, we can provide instructions on how these relate to results from Version 1).

Appendix B: Where the VI-SPDAT is being used in the United States

Since the VI-SPDAT is provided completely free of charge, and no training is required, any community is able to use the VI-SPDAT without the explicit permission of Community Solutions or OrgCode Consulting, Inc. As a result, the VI-SPDAT is being used in more communities than we know of. It is also being used in Canada and Australia.



A partial list of continua of care (CoCs) in the US where we know the VI-SPDAT is being used includes:

Alabama

- Parts of Alabama Balance of State

Arizona

- Statewide

California

- San Jose/Santa Clara City & County
- San Francisco
- Oakland/Alameda County
- Sacramento City & County
- Richmond/Contra Costa County
- Watsonville/Santa Cruz City & County
- Fresno/Madera County
- Napa City & County
- Los Angeles City & County
- San Diego
- Santa Maria/Santa Barbara County
- Bakersfield/Kern County
- Pasadena
- Riverside City & County
- Glendale
- San Luis Obispo County

Colorado

- Metropolitan Denver Homeless Initiative
- Parts of Colorado Balance of State

Connecticut

- Hartford
- Bridgeport/Stratford/Fairfield
- Connecticut Balance of State
- Norwalk/Fairfield County
- Stamford/Greenwich
- City of Waterbury

District of Columbia

- District of Columbia

Florida

- Sarasota/Bradenton/Manatee, Sarasota Counties
- Tampa/Hillsborough County
- St. Petersburg/Clearwater/Largo/Pinellas County
- Tallahassee/Leon County
- Orlando/Orange, Osceola, Seminole Counties
- Gainesville/Alachua, Putnam Counties
- Jacksonville-Duval, Clay Counties
- Palm Bay/Melbourne/Brevard County
- Ocala/Marion County
- Miami/Dade County
- West Palm Beach/Palm Beach County

Georgia

- Atlanta County
- Fulton County
- Columbus-Muscogee/Russell County
- Marietta/Cobb County
- DeKalb County

Hawaii

- Honolulu

Illinois

- Rockford/Winnebago, Boone Counties
- Waukegan/North Chicago/Lake County
- Chicago
- Cook County

Iowa

- Parts of Iowa Balance of State

Kansas

- Kansas City/Wyandotte County

Kentucky

- Louisville/Jefferson County

Louisiana

- Lafayette/Acadiana
- Shreveport/Bossier/Northwest
- New Orleans/Jefferson Parish
- Baton Rouge
- Alexandria/Central Louisiana CoC

Massachusetts

- Cape Cod Islands
- Springfield/Holyoke/Chicopee/Westfield/Hampden County

Maryland

- Baltimore City
- Montgomery County

Maine

- Statewide

Michigan

- Statewide

Minnesota

- Minneapolis/Hennepin County
- Northwest Minnesota
- Moorhead/West Central Minnesota
- Southwest Minnesota

Missouri

- St. Louis County
- St. Louis City
- Joplin/Jasper, Newton Counties
- Kansas City/Independence/Lee's Summit/Jackson County
- Parts of Missouri Balance of State

Mississippi

- Jackson/Rankin, Madison Counties
- Gulf Port/Gulf Coast Regional

North Carolina

- Winston Salem/Forsyth County
- Asheville/Buncombe County
- Greensboro/High Point

North Dakota

- Statewide

Nebraska

- Statewide

New Mexico

- Statewide

Nevada

- Las Vegas/Clark County

New York

- New York City
 - Yonkers/Mount Vernon/New Rochelle/Westchester County
- Ohio**
- Toledo/Lucas County
 - Canton/Massillon/Alliance/Stark County

Oklahoma

- Tulsa City & County/Broken Arrow
- Oklahoma City
- Norman/Cleveland County

Pennsylvania

- Philadelphia
- Lower Marion/Norristown/Abington/Montgomery County
- Allentown/Northeast Pennsylvania
- Lancaster City & County
- Bristol/Bensalem/Bucks County
- Pittsburgh/McKeesport/Penn Hills/Allegheny County

Rhode Island

- Statewide

South Carolina

- Charleston/Low Country
- Columbia/Midlands

Tennessee

- Chattanooga/Southeast Tennessee
- Memphis/Shelby County
- Nashville/Davidson County

Texas

- San Antonio/Bexar County
- Austin/Travis County
- Dallas City & County/Irving
- Fort Worth/Arlington/Tarrant County
- El Paso City and County
- Waco/McLennan County
- Texas Balance of State
- Amarillo
- Wichita Falls/Wise, Palo Pinto, Wichita, Archer Counties
- Bryan/College Station/Brazos Valley
- Beaumont/Port Arthur/South East Texas

Utah

- Statewide

Virginia

- Richmond/Henrico, Chesterfield, Hanover Counties
- Roanoke City & County/Salem
- Virginia Beach
- Portsmouth
- Virginia Balance of State
- Arlington County

Washington

- Seattle/King County
- Spokane City & County

Wisconsin

- Statewide

West Virginia

- Statewide

Wyoming

- Wyoming Statewide is in the process of implementing

Navigation Pane						
Version 3.2						
GENERAL	ABOUT THE TOOL	TOOL RESOURCES	RAW HIC DATA	LIST OF PROJECTS TO BE REVIEWED		
RATING	CUSTOMIZE RATING CRITERIA	RENEW. + EXP. THRESHOLD	RENEW. + EXP. RATING TOOL	NEW PROJECTS THRESHOLD	NEW PROJECTS RATING TOOL	ALTERNATIVE RATING TOOL
RANKING	FUNDING CEILINGS + PRIORITIES	FUNDING ANALYSIS + RANKING				
						RATING RESULTS

ABOUT THE CoC PROGRAM RATING & RANKING TOOL

ABOUT THE TOOL

HUD is providing this Rating and Ranking Tool to help CoCs design and implement a comprehensive annual CoC competition application review process. It has several customization features so you can choose the rating factors that are most relevant to your CoC and the priorities your CoC has adopted to inform system (re)design.

DISCLAIMER: HUD is explicitly stating that use of this tool is optional, is not being promoted over other tools CoCs currently use, and does not guarantee:

- additional points in the Fiscal Year (FY) 2018 Continuum of Care Program (CoC) Competition;
- CoC applications will be consistent with all NOFA requirements; and
- HUD will award CoCs with full points or funding.

The tool provides a strong framework for implementing a data-driven rating process and a ranking process informed by system priorities and capacity analysis (if available) and it satisfies the objective criteria requirement in the **FY 2018 CoC Program NOFA**. HUD strongly encourages CoCs to read the CoC Program NOFA carefully to determine if there are new opportunities, priorities, or expectations that your CoC might need to assess outside this tool. The Priority Listing is the official project ranking record for the CoC Program NOFA. HUD is not requiring CoCs to use this tool, nor is it preferred over other rating tools or processes, use of the tool does not guarantee additional points on the CoC Program application. HUD has made this tool available to CoCs for use in their year-round NOFA planning process. Feedback on the tool is welcome.

Microsoft Excel 2003 or higher is required when using this tool. When opening the tool workbook, you might need to click **"Enable Content"**, **"Enable Editing"**, and/or **"Enable Macros"** buttons in the yellow bar at the top of your screen. This is necessary for the macros and formulas to run correctly within the spreadsheet. If you get an error message, please check to see if the yellow bar is present and click these buttons before attempting to use the tool further. If you encounter a bug while using the tool, click **"End"** in the error pop-up, return to this tab and click the **"Turn On Macros"** button in the top right corner to ensure the underlying code is not disrupted before resuming. CoCs can submit technical questions about the Rating and Ranking Tool, including requesting help with bugs in the Tool, through the esnaps competition AAQ desk.

Due to the complexity of the tool, problems might occur when multiple Excel files are open at the same time. To help alleviate this problem, you should close all other Excel files on your computer before running the following parts of the tool:

- Generating list of projects from Raw HIC data
- Populating rating results
- Generating project ranking

CHANGES FROM VERSION 3.1 TO VERSION 3.2

- Instructions for migrating data from version 2.3 to all versions developed for the FY18 CoC NOFA (ie. Version 3.0, 3.1 and 3.2) have been updated and clarified.
- Instructions for manually entering data on the **'LIST OF PROJECTS TO BE REVIEWED'** tab have been clarified.
- Programming error that hid the scoring of additional New Project rating factors on the **'NEW PROJECTS RATING TOOL'** tab has been corrected.
- Programming error that caused inaccuracies in the display of scores when a Project Type was selected on the **'CUSTOMIZE RATING CRITERIA'** tab dropdown that didn't match the type of the project currently being rated was corrected.
- Programming correction to ensure scores are accurately displayed when switching between projects of different types on the **'RATING TOOL'** tabs.
- New programming to allow saving of the PERFORMANCE values entered for individual projects on the **'RENEW. + EXP. RATING TOOL'** tab.

CHANGES FROM VERSION 3.0 TO VERSION 3.1

Updates to version 3.1 include corrections to programming errors and improved functionality.

CHANGES:

- Projects now move between tables (ex. Tier 1 and Tier 2) in the **‘FUNDING ANALYSIS + RANKING’** tab. A programming error did not allow movement into a table if it was currently empty.
- If skipping the HIC data upload, projects added on the **‘LIST OF PROJECTS TO BE REVIEWED’** tab will now appear. A programming error had hidden them.
- Goals for additional rating factors on the **‘RENEW.+EXP. RATING TOOL’** tab will now be shown. A programming error had hidden them.
- On the **‘FUNDING ANALYSIS + RANKING’** tab reallocated projects in the **'Projects Not Selected For Funding'** will now be labeled "Reallocated" instead of “Over Target”.
- On the **‘FUNDING ANALYSIS + RANKING’** projects moved down into the **'Projects Not Selected For Funding'** table' will now be labeled "Exceeds ARD" instead of “Over Target”.
- On the **‘FUNDING ANALYSIS + RANKING’** projects in the **'Projects Exceeding ARD'** table' will now be labeled "Exceeds ARD" unless they are "Ineligible".
- Tier 2 ranking numbers continue from Tier 1 rather than starting over.
- Selecting a project on either a threshold tab or individual rating tool tab will cause that project to be selected on the other tab to make the rating process easier and more transparent.

CHANGES FROM VERSION 2.3 TO VERSION 3 FOR FY18 CoC NOFA

Updates to the FY18 CoC Program Rating and Ranking Tool include a number of usability and performance improvements, a few new features, and revisions to the tool's language and instructions for clarity.

NEW FEATURES

- Rating criteria can be customized for each project type (RRH, PSH, TH) in the 'CUSTOMIZE RATING CRITERIA' tab and all criteria have factor and goal fields for more customization. If the CoC wants to print the rating templates for use with the CoC Committee this can be done from the "Print Blank Template" icon at the top of the 'RENEW. + EXP. RATING TOOL' and 'NEW PROJECTS RATING TOOL' tabs.
- Project performance can be recorded in the 'RENEW. + EXP. RATING TOOL' tab for documentation purposes.
- "Print Report Card" feature added to the 'RENEW. + EXP. RATING TOOL' tab to share final rating decisions with CoC Review Committee or projects. The 'RENEW. + EXP. RATING TOOL' tab can also be used to track performance against CoC rating criteria throughout the year, and the "Print Report Card" button can be used to distribute these mid-year performance reports.
- 'ALTERNATIVE RATING TOOL' tab added to enter project threshold review results and rating scores for CoCs that have completed the rating process not using the tool and want to use the tool to rank their projects.
- New funding for projects serving survivors of domestic violence has been added to the ranking process.
- Ranking process places DV bonus and bonus projects in the list of projects by performance and need instead of placing them in Tier 2 by default.

MIGRATING DATA TO NEWER VERSIONS OF THE TOOL

The version of the CoC Program Rating and Ranking Tool created for the FY18 CoC Program NOFA (Version 3.0 and higher) contains improvements to the rating process and includes the new funding for projects serving survivors of domestic violence in the ranking process, CoCs are strongly encouraged to use Version 3.0 for the FY18 CoC NOFA process. The Tool has been updated to reflect the FY18 NOFA to the greatest extent possible. CoCs are responsible for verifying that the rating and ranking process they use is consistent with the NOFA.

If a CoC has started using an earlier version of the Tool for the FY18 NOFA process the data entered into the data can be migrated to Version 3.0 by following the steps in the chart below.

If a CoC decides to use version 2.3 for the FY18 CoC process, they should review the HUD threshold requirements in the 'RENEW. + EXP. THRESHOLD' and 'NEW PROJECTS THRESHOLD' tabs and the NOFA information in the "General Funding Information" and "HUD CoC Program NOFA Opportunities" sections of the 'FUNDING CEILINGS + PRIORITIES' tab carefully to take into account any changes in HUD requirements or NOFA opportunities in the FY18 CoC NOFA.

STEP IN TOOL PROCESS	PROCESS FOR MIGRATING DATA
Uploaded HIC and entered all projects in 'LIST OF PROJECTS TO BE REVIEWED' tab	Migrate data from from any earlier version of the tool to the current version (e.g. from Version 2.3 to 3.0 or from Version 3.0 to 3.1, etc.) by copying the data (one column at a time, excluding headers) in the 'LIST OF PROJECTS TO BE REVIEWED' tab from one version to the other. If copying from version 2.3 of the tool make sure that in the "Renewal, New, Expansion, Reallocate, Ignore" column, you select "Ignore" for any projects that are funded by the Emergency Solutions Grant.
Completed threshold review and project rating for all projects and have clicked the "Populate Rating Results" button in the 'RATING RESULTS' tab.	Migrate data from from any earlier version of the tool to the current version (e.g. from Version 2.3 to 3.0 or from Version 3.0 to 3.1, etc.) by taking the following steps: 1. Open a copy of the current version and navigate to the 'ABOUT THE TOOL' tab and click the "Turn Off Macros" button. 2. Navigate to the 'RATING RESULTS' tab. In the ribbon at the top of the Excel window, click the Review tab, then the Unprotect Sheet button in the Changes group. 3. Copy data from each table column (ignoring headers) in the old version 'RATING RESULTS' tab to the corresponding column in version 3.0. When you paste, be sure to paste as values (right-click on the destination cell, then hit V). 4. In the current version, fill in column V. 5. Navigate to the 'ABOUT THE TOOL' tab and click the 'Turn On Macros' button.

GETTING STARTED

Before using the tool, read the instructions below to gain an understanding of all the steps and how they fit together, as well as the details of how to use the tool. The tool can be completed all at once or in phases. The different steps of the rating and ranking process are separated into different tabs. Use the tabs at the bottom of each screen to navigate the tool.

Step 1: Prepare your list of projects for review, including projects your CoC is reallocating:

Tab: RAW HIC DATA

Tab: LIST OF PROJECTS TO BE REVIEWED

Step 2: Review all projects for threshold criteria and then score projects based on locally-adopted rating criteria:

Tab: CUSTOMIZE RATING CRITERIA

Tab: RENEW. + EXP. THRESHOLD

Tab: RENEW. + EXP. RATING TOOL

Tab: NEW PROJECTS THRESHOLD
Tab: NEW PROJECTS RATING TOOL
Tab: ALTERNATIVE RATING TOOL
Tab: RATING RESULTS

Step 3: Establish Local Funding Ceilings and Priorities and then rank projects accordingly:

Tab: FUNDING CEILINGS + PRIORITIES
Tab: FUNDING ANALYSIS + RANKING

KEY TERMS

Rating: The process of scoring projects based on standardized criteria. Projects are generally scored relative to other projects of the same type. Some projects such as the HMIS or coordinated entry might not be rated since there is no clear mechanism to score them relative to other projects. The tool refers to these as "non-rated" projects.

Ranking: The process of prioritizing projects for funding in rank order. The rating scores are generally an important input into the ranking process (e.g., projects might be ranked according to their score), but the CoC might intend to add other factors to inform ranking. For instance, ranking might be prioritized based on project type, population groups, relative levels of unmet need, or other local funding priorities.

Grant Types (Renewal, Reallocated, Expansion, New):

Renewal grants represent previously funded projects that are requesting renewal funding. These projects should have historical performance data that CoCs can use for rating purposes.

Reallocated grants represent previously funded projects that are not being submitted for renewal. These projects will not be rated or ranked. The amount of the previous annual award will be available for new projects, meaning those coded either as new or expansion grants within the tool.

New grants represent funding requests for new projects that do not have any historical performance information to use for rating purposes. The New Project Rating criteria are largely narrative-based.

Expansion grants are new funding requests to expand an existing project. Therefore, the applicant should have historical performance data from the current project that CoCs can use as a proxy to rate the grant application. Expansion projects prioritized for funding must be listed as "New" grants in the CoC Application.

STEP 1: PREPARE YOUR LIST OF PROJECTS FOR REVIEW

This tool allows applicants to use your CoC's most recent Housing Inventory Count (HIC) data to populate existing residential projects, rather than setting up all projects from scratch. The instructions below describe the process to import and adjust HIC data.

If you decide to enter the data manually, you can skip this tab and proceed directly to the **'LIST OF PROJECTS TO BE REVIEWED'** tab. The final list of projects generated through this process populates the universe of renewal, expansion, and new projects in the rating tools.

TAB: RAW HIC DATA

To use your CoC's most recent HIC data to populate existing residential projects in the tool:

- 1) Go to HUD HDX and select the HIC tab.
- 2) Select 'Inventory List' under the HIC tab.
- 3) Select the year with the most current HIC data.
- 4) Select 'Choose Columns' under the Inventory List Tab. A Choose Columns table will appear.
- 5) Under the Choose Columns table, select 'Select All' and close table.
- 6) Select the 'Export to Excel' option.
- 7) Save the HIC data that will appear in an Excel spreadsheet onto your computer.
- 8) Copy and paste the saved HIC data onto the **'RAW HIC DATA'** tab in the tool. You should copy your CoC's HIC data by selecting the relevant records directly in the HIC download. Include **the header row** but do not include any summary rows. Paste the selection into the **'RAW HIC DATA'** tab on top of the header row (starting in cell A2). Do not use the MS Excel copy function that allows you to copy and paste the entire worksheet, as that will overwrite the **"Generate List of Projects from Raw HIC Data"** button on the **'RAW HIC DATA'** tab. If you inadvertently copy over this function, restart the import process with a clean copy of the tool to ensure the underlying programming is not affected. If you intend to include HIC data for multiple CoCs, you can paste additional excerpts into the **'RAW HIC DATA'** tab below the first excerpt, but you should not include additional header rows or any blank rows in the data.

- 9) Click **"Generate List of Projects from Raw HIC Data"** button at the top of the **'RAW HIC DATA'** tab. The tool will select and reformat the necessary fields from the **'RAW HIC DATA'** tab. The reformatted data will appear on the **'LIST OF PROJECTS TO BE REVIEWED'** tab.

If you do not intend to import HIC data into the tool, proceed to the **'LIST OF PROJECTS TO BE REVIEWED'** tab to directly enter all projects that you intend to review. The final list of projects generated through this process will populate the universe of renewal, expansion, and new projects on the rating tools.

NOTE: The HIC only collects inventory information for each family subpopulation by the number of beds available to that subpopulation. This means the tool indicates inventory information for families in beds not units. CoCs must keep this in mind when adding new family projects and setting ranking parameters for families.

TAB: LIST OF PROJECTS TO BE REVIEWED

Assuming they were listed on your CoC's HIC, all renewal CoC Program funded PSH, RRH, SH, TH, and TH-RRH projects should now be listed on the "LIST OF PROJECTS TO BE REVIEWED" tab. (Instructions on how to add additional projects are provided below.) You will only see projects from the HIC identified as "Receiving McKinney-Vento funding" that are not "McKinney-Vento: EsgES" or "McKinney-Vento: EsgRrh". ES projects with funding from any source, ESG funded RRH projects and non-McKinney-Funded projects have automatically been coded to be ignored for purposes of rating and ranking. However, you can see them by clicking on the filter icon next to the "Renewal, New, Expansion, Reallocate, Ignore" column and clicking "Select All". You can then unhide various project groupings by unchecking the respective boxes in the sort menu of relevant column headers.

This list will be used to populate the rating and the ranking tabs, so complete and accurate information at this step is essential. You can use the final 2018 Grant Inventory Worksheet (GIW) for your CoC to compare the projects brought in from the HIC with the list of projects eligible for renewal through the FY2018 CoC Program NOFA. If entering data manually, be sure to add unique numeric Project IDs to all projects entered on this tab.

Using the green columns in this tab, you must identify which McKinney-Vento funded projects will be considered for this year's CoC Application review process and you must fill in additional funding information for the projects that are being considered for this grant cycle.

- 1) No two projects can have the same **"Organization Name"/"Project Name"** combinations. Check the list for duplicates. If duplicates are legitimate (e.g., the same agency operates a shelter and a transitional housing project that have the same name and are distinguished by other project attributes), add consecutive numbers or other distinguishing labels to the **"Project Name"** to make each row distinct. If duplicates are not legitimate, delete the duplicate row or otherwise correct the source data.
- 2) In the 5th green column, select **"Renewal"** for all projects that you intend to rate as part of the application process. Select **"Reallocate"** if the project is eligible for renewal, but the CoC has decided to reallocate the funds. Select **"Ignore"** if you intend for the tool to ignore the project for rating and ranking purposes.
- 3) In the first green column, add the CoC grant number for the projects that you have classified as **"Renewal"** or **"Reallocate"**.

4) In the remaining green columns, enter the "**CoC Amount Awarded Last Operating Year**" for renewal and reallocated grants and then enter the "**CoC Amount Expended Last Operating Year**" and "**CoC Funding Requested**", for each renewal grant. If you intend to renew a project at a lower funding level as part of a reallocation strategy then the project should be marked as a **Renewal** project with the lower amount in the "**CoC Funding Requested**" column.

5) In the columns with blue headings to the left, check the unit/bed inventory of the projects that you classified as "**Renewal**" projects. Since projects might be listed differently than the way they are funded with CoC Program grants, you might need to adjust the bed counts associated with grants eligible for renewal. (Note: if two HIC projects are combined under one grant, choose one project to rate, update bed counts to reflect the total number of both projects, and select "**Ignore**" in the right-most green column for the other. In making this change, make sure the project names are not identical, even if one is "**Ignore**".) The grey columns are populated with data from the information entered into the blue columns; in order to adjust totals in the grey columns you must change the source data in the columns with blue headings.

6) Add other renewal, expansion, and new projects to be rated and ranked (see below). Additional projects would include new or expansion residential projects that are applying in this grant cycle for bonus, DV or reallocated funding, renewal projects that were not in service at the time the HIC data was collected, renewal SSO projects, new and renewal SSO coordinated entry projects, and new and renewal HMIS projects.

NOTE: The tool is not designed to rate or score Safe Haven, TH-RRH awarded under the FY2017 NOFA, SSO or HMIS projects, since performance data may not be available for some of these projects and a CoC usually only has one of each project type preventing comparison of performance. The tool will automatically list them as "Not Rated" in the Rating Results, and then you will be able to rank them alongside the other rated projects based on locally adopted ranking priorities. Your CoC may want to develop a scoring process outside of the tool to assist in the rating process for these projects.

To add additional projects:

1) In the '**LIST OF PROJECTS TO BE REVIEWED**' tab, click the '**Add Additional Project to the List Below**' button.

2) A form will appear asking for information for the additional project. If a new project is based on a project with historical performance data, it should be classified as an "**Expansion**" project in the form. Expansion projects will be rated using the '**RENEW. + EXP. RATING TOOL**' tab. If the proposed project is completely new and does not have historical performance data, classify it as a "**New**" project. If a project is eligible for renewal, but the CoC has decided to reallocate the funds, classify it as a "**Reallocated**" project. Every field except the grant number is required for a project to be added to the form. If a PSH project will be considered for bonus funding make sure the 100% of Individual/Family Beds Targeted to CH box is checked. If a new project will be considered for DV bonus funding make sure the 100% DV box is checked. Click '**OK**' to add the project to the list.

3) To add additional projects, repeat the process.

4) If you need to change information about a project you already added, click the row to adjust the information.

5) After you create the additional projects, enter information about "**CoC Amount Awarded Last Operating Year**", "**CoC Amount Expended Last Operating Year**" and "**CoC Funding Requested**" as appropriate for the "**Renewal, New, Expansion or Reallocation**" status of the project.

You can edit most information after creating projects. If you intend to remove a project from the list of projects to be reviewed select "**Ignore**" and the project will be ignored for purposes of the Tool or you can unprotect the Tool and delete the row.

Because the HIC records might vary from the number of units funded with a CoC Program award, the tool prompts you to verify project inventory that was uploaded from your HIC against your CoC's Grant Inventory Worksheet. To do this, download your approved GIW from the HUD website and check all projects that your CoC has designated for renewal or reallocation. Once you complete your check, check the box labeled "**Check once you have confirmed the bed inventory...**" before advancing to the next step. This inventory information must be accurate because it will be used during the ranking process to tally the number of units that the CoC will request funding for within the different bonus and funding tiers.

Transition Grants

The FY18 CoC NOFA allows CoCs to change a project's component type and use up to six months of funding to transition to the new project. These projects will be assessed based on the new component so the CoC needs to update the project's information in the tool. Use the following steps for a transition grant:

1. Upload the current grant to the tool through the HIC upload or 'Add Additional Project to the List Below' button on the '**LIST OF PROJECTS TO BE REVIEWED**' tab. The project should be listed as a "**Renewal**" in column M.

2. Change the project's component or project type in column E of the '**LIST OF PROJECTS TO BE REVIEWED**' tab and adjust the project's beds by population in the blue columns P-AD, do not enter any values into the dark grey cells in this area.

3. Rate the new project's anticipated performance using one of these approaches depending on whether performance data for a similar project is available:

a. If performance data for a similar project (ex. the recipient already operates PSH and the transition grant is changing to a PSH project that would be similar to current PSH projects) is available, then use that data to rate the new project on the '**RENEW.+EXP. RATING TOOL**' tab.

b. If performance data is not available, then score the project as a new project using a paper template printed using the 'Print Blank Template' icon on the '**NEW PROJECTS RATING TOOL**' tab. Weight the score on a 100 point scale and add the score to the project on the '**ALTERNATIVE RATING TOOL**' tab.

4. The project should be ranked based on how the new project will meet the CoC's funding priorities.

STEP 2: REVIEW ALL PROJECTS

The tool uses a two-step process for rating—a threshold requirements review and performance scoring. These steps can be performed at the same time or in phases. Because new projects do not have historical performance data upon which to base ratings, this tool provides different rating processes for renewal/expansion projects and for new projects. Before beginning rating, you may customize the threshold and rating tabs with local criteria. Then you can begin entering threshold and/or rating scores for the projects set up on the 'LIST OF PROJECTS TO BE REVIEWED' tab. Blank templates of your threshold and rating criteria can be printed so your CoC can use paper copies as part of its rating process, if desired.

TAB: CUSTOMIZING RATING CRITERIA

All customization selections made on this tab will be reflected on the following tabs: 'RENEW. + EXP. THRESHOLD', 'RENEW. + EXP. RATING TOOL', 'NEW PROJECTS THRESHOLD', and 'NEW PROJECTS RATING TOOL'.

There are four sections on the 'CUSTOMIZE RATING CRITERIA' tab.

The **NAVIGATION** section allows you to navigate directly to the other subsections in this tab. For example, selecting 'GO' next to Customize New Rating Tool will navigate you to the Customize New Rating Tool section of this tab.

The **CUSTOMIZE NEW AND RENEWAL/EXPANSION PROJECT THRESHOLD REQUIREMENTS** section allows you to customize CoC-specified threshold requirements for New and Renewal projects. **Any changes made here will be reflected on the 'RENEW. + EXP. THRESHOLD' and 'NEW PROJECTS THRESHOLD' tabs.**

The 'RENEW. + EXP. THRESHOLD' and 'NEW PROJECTS THRESHOLD' tabs have two types of threshold requirements: **HUD Threshold Requirements**, which are intended to mirror the requirements that HUD will use to assess each application, and **CoC Threshold Requirements**, which allow the CoC to define additional threshold requirements. CoCs can use this section of the 'CUSTOMIZE RATING CRITERIA' tab to customize the CoC Threshold Requirements. The HUD Threshold Requirements are populated in the tool, and cannot be customized. However, CoCs should review the HUD Threshold Requirements against the NOFA to ensure that all NOFA requirements are accounted for. If they are not, the CoC can add them as CoC Threshold Requirements for purposes of the review process.

- 1) Based on HUD CoC Program requirements and a scan of effective local rating tools, the tool includes a list of suggested CoC Threshold requirements to consider for all projects. For definitions of the suggested CoC Threshold Requirements, see the CoC Threshold Requirements chart in the Tool Resources tab.

Note: To be consistent with the rating process suggested in the CoC Program NOFA, HUD strongly encourages CoCs to include the first five items either as Threshold Requirements or as Rating Factors.

- 2) You can choose whether to include CoC threshold requirements from the suggested list by deleting the X in the box to the left of the requirement.
- 3) You can add threshold requirements by clicking 'Add Additional CoC Threshold Requirement'. The tool will prompt you to enter the text of the additional threshold requirement and click **OK**. Repeat the process to add more requirements.

The **CUSTOMIZE RENEWAL RATING TOOL** section allows you to customize the rating tool for renewal projects. **Any changes made here will be reflected on the 'RENEW. + EXP. RATING TOOL' tab.** There are four subsections here:

- Performance Measures
- Serve High Need Populations
- Project Effectiveness, and
- Other and Local Criteria.

The tool provides suggested rating factors for each subsection. **You can choose not to include suggested rating factors by deleting the X in the box to the left of the factor.**

Many of the recommended factors have a suggested Factor/Goal parameter, and all have suggested Max Point Values. You can modify these to align with local funding policies and based on availability of data. HUD encourages CoCs to develop a companion rubric or scale specifying how CoCs will award points for each rating factor. For instance, if a factor is worth 15 points, a CoC could establish a scale for prorating the points awarded based on performance ranges.

You can set rating factors for each of the main project types (RRH, PSH, TH) by selecting each project type from the "Project Type to Edit" drop-down menu on the top left side of this section.

- For **Length of Stay and Exits to Permanent Housing**, the suggested factors are different for the different project types: RRH, PSH, and TH. The suggested maximum score for Length of Stay is 20 points and for Exit to Permanent Housing is 25 points.
- For **Returns to Homeless**, the factor is the same for all project types with a suggested maximum score of 15 points.
- For **New or Increased Income and Earned Income**, there are four factors that total to a suggested maximum score of 10 points.
- For **Serve High Need Population**, the factor is the same for all project types with a suggested maximum score of 20 points except for the APR data approach which totals 30 points.

Based on local policies and preferences, this factor can be evaluated using one of three approaches:

- Coordinated Assessment Score
- Project Focuses on Chronically Homeless People
- APR data on \geq 50% of participants had a disability or were zero income or were unsheltered prior to entry

- For **Project Effectiveness**, there are three recommended factors which are the same for all project types with a suggested maximum score for this section of 40 points.

You can also add factors.

- 1) Click '**Add Renewal/Expansion Project Rating Factor**'.
- 2) Complete the table that will appear and click **OK**.
- 3) The additional factor will be included under the **Other and Local Criteria**.

If you add a factor that you later decide not to use, delete the X in the box to the left of the rating factor.

Already finished with your local CoC rating process? Go to the ALTERNATIVE RATING TOOL and enter threshold and rating answers in bulk.

The CUSTOMIZE NEW RATING TOOL section allows you to customize the rating tool for new projects. This section uses the same process as in the CUSTOMIZE RENEWAL RATING TOOL section. Any changes made here will also be made to the 'NEW PROJECTS RATING TOOL' tab. There are six subsections here:

- Experience
- Design of Housing and Supportive Services
- Timeliness
- Financial
- Project Effectiveness
- Other and Local Criteria

Because these are new projects with no performance data, rating is based on the answers to narrative questions. The CoC should develop a rubric to guide scoring of new project proposals.

After customizing all of the tools, the total maximum score might be different for renewal/expansion or new projects, or even for different project types within them. After projects are rated, the scores will be weighted against a 100 point scale when they are considered for ranking. Raw scores will be visible on the rating tool for each project. Weighted scores will be visible in the '**RATING RESULTS**' tab.

Depending on how the CoC customizes the rating tool, **the CoC will likely need to develop its own local application packet to request the information necessary to score each project.** The tool allows points for each rating factor to be awarded on a scale, up to the maximum point value specified. Therefore, HUD strongly encourages **each CoC to develop a scoring rubric or scale to assign the points for each rating factor.**

Addressing the Needs of DV Survivors: The tool allows communities to customize the rating and ranking process in several ways. The needs of DV survivors are addressed most directly through the ranking process. A CoC can select DV Families or DV Individuals as a priority subpopulation on the **FUNDING CEILINGS + PRIORITIES** tab. Using this approach, a project that serves DV survivors that has a longer length of stay than other projects can be prioritized for funding. DV was not included as a high need population in the rating process because that criteria focused on vulnerability of individuals and not on prioritizing projects serving specific subpopulations such as DV. CoCs can add additional rating criteria to address DV if the community desires.

TAB: RENEW. + EXP. THRESHOLD

Each project should be reviewed to determine if it meets specified threshold requirements.

- 1) Use the drop-down list in the "Project Name" field to find the name of the renewal or expansion grant application you intend to review first. Once selected, basic information about the grant will be populated in the top of the threshold review tool, and you can fill in the results of the threshold review.
- 2) The threshold criteria shown on the form will be customized based the criteria established on the '**CUSTOMIZE RATING CRITERIA**' tab. For each criterion, click the grey cell and select "**Yes**" or "**No**" from the drop-down selection. Yes or no are the only options because the project must fully meet the criteria in order to meet threshold. If the CoC has already reviewed the threshold requirements for all projects under consideration the "**Yes to All**" box can be checked for projects that have met all the requirements. If a CoC has granted a waiver for a particular project (e.g., a victim services provider does not participate in coordinated entry the way other projects would be expected to participate), the CoC should select "**Yes**" for the requirement.
- 3) Click "**Save**" to save the results and then either keep working on the same project or select another project from the dropdown and enter the threshold review results for it.
- 4) To edit a project already reviewed, select the project from the dropdown. Projects that have been reviewed will be listed at the bottom of the dropdown list and will have a checkmark next to the project name. Results can be edited, and then the record should be saved again by clicking "**Save**".

After you have conducted threshold review for a project, it is moved to the bottom of the list and its completion is accounted for in the overall progress bar.

CoCs will need to adopt policies to decide whether to rate projects that do not meet all HUD Threshold Requirements and all CoC Threshold Requirements. The tool is designed to allow CoCs to score projects whether they meet threshold requirements or not. On the '**RATING RESULTS**' tab, the tool will flag with red highlighting projects that did not go through threshold review and any project that has not met all HUD or CoC Threshold Requirements and on the '**FUNDING ANALYSIS + RANKING**' tab, they will initially be ranked in the section labeled "**Projects Not Selected for Funding**" and marked as **Ineligible** in the **Ranking** column.

A project that does not meet all threshold requirements in the local application review process is not likely to meet threshold review in HUD's CoC application process; therefore CoCs are strongly encouraged not to rank projects that do not meet "**HUD Threshold Requirements**", or they should work with applicants to address deficiencies prior to submitting a formal application for CoC Program funding. A CoC can move these projects up into a funding position, based on CoC funding policies. (More instructions on this topic are included below.)

TAB: RENEW. + EXP. RATING TOOL

After threshold review, each of the projects can be scored. (The tool will allow you to score projects that do not meet all threshold criteria, but you do not have to score them.) Your CoC review committee can use the tool real-time during your scoring process, or scores can be determined through a separate process and entered into the tool later.

- 1) Use the drop-down list in the "**Project Name**" field to find the name of the renewal or expansion grant application you intend to score. Once selected, basic information about the grant will populate in the top of the rating tool, and you can fill in the results of the scoring. If the project has not been scored on the threshold requirements a message will appear that states '**Threshold rating not started**'. If the project has not met one or more threshold requirements a message will appear that states '**Did not meet all threshold requirements**'.
- 2) The rating factors shown on the form will be customized based on the type of project being scored and the factors established on the '**CUSTOMIZE RATING CRITERIA**' tab. For each factor, enter the points earned by the project on a scale from 0 to the maximum point value specified.
- 3) Click "**Save**" to save the results. After saving, you can keep working on the same project or you can select another project to score
- 4) To edit a project that has already been scored, select it from the menu and edit. Click "**Save**" before moving to the next project.

If your CoC has already rated all new and renewal projects for the funding cycle, threshold review results and rating scores can be entered in bulk in the '**ALTERNATIVE RATING TOOL**' tab.

TAB: NEW PROJECTS THRESHOLD

The process outlined above for renewal projects should be followed to determine if each new project meets specified threshold requirements.

TAB: NEW PROJECTS RATING TOOL

You should follow the same process outlined above for renewal projects to determine if each new project meets specified rating factors. The rating tool will be customized according to the criteria specified for New Projects in the '**CUSTOMIZE RATING TOOL**' tab.

TAB: ALTERNATIVE RATING TOOL

As an alternative to manual entry of a project's threshold review and rating scores, CoCs can quickly enter threshold review results and a weighted rating score for each project on the '**ALTERNATIVE RATING TOOL**' tab. CoCs who have completed a review process using a local rating approach can use this tab to enter threshold and rating information so that the tool can be used to rank projects using the CoC's funding priorities.

- 1) Click the button called "**Pull in projects to rate**".
- 2) If desired, sort the projects by various categories using the drop-down menu in the top left corner.
- 3) Enter results of the HUD and CoC threshold requirements review using the drop-down menu in each cell or click the box next to '**Yes to all threshold requirements**' to answer Yes for all projects.
- 4) Enter weighted rating scores for each project.
- 5) Click the '**Save**' button in the top right corner to save the information entered into the tab.

TAB: RATING RESULTS

When you are finished rating all projects, move to the '**RATING RESULTS**' tab and click "**Populate Rating Results**" at the top of the page. At any point, if you add and rate other projects, you must click this button again to repopulate the tab. This tab allows you to see the new, renewal, and expansion projects on one form with their threshold review results and rating scores. If a project did not meet all threshold requirements, the row will be highlighted red.

Review the projects for any errors. You must correct errors on the tabs on which you originally entered the information (e.g., '**LIST OF PROJECTS TO BE REVIEWED**' tab, the '**THRESHOLD**' and '**RATING TOOL**' tabs or the '**ALTERNATIVE RATING TOOL**' tab). If you change any information in the source tabs, you must click '**Populate Rating Results**' to refresh the information.

STEP 3. RANK PROJECTS

After completing individual project rating, the CoC must establish a rank order list of projects to include in its annual CoC Application to HUD. CoCs can use these tabs to set system-wide funding priorities and then to produce a ranked list that reflects both the rating results and funding priorities. The tool produces tallies of funding within Bonus, DV Bonus, Tier 1, and Tier 2 (Remaining ARD + Bonus + DV) funding levels, so CoCs can assess the reach of their annual CoC investments. The funding analysis table displays the units funded by project type and population along with indicating whether the caps or ceilings for project types and populations have been met or exceeded. Blue shading in the Funding Analysis + Ranking Table indicates the population and project types that will be served by the units in the Tier 1 and Tier 2 lists. The tool also offers CoCs flexibility to adjust rank order to implement local funding priorities or CoC Program NOFA provisions that are not addressed within the tool.

TAB: FUNDING CEILINGS + PRIORITIES

Separate from the rating process, the tool allows the CoC to specify system-wide funding priorities for its annual funding process. Many CoCs have not yet made the distinction between rating results and ranking priorities, so this step may be new for many stakeholders.

This tab has three sections:

- General Funding Information
- FY2018 HUD CoC Program NOFA Opportunities
- Funding Ceilings and Priorities by Project Type and Population.

In the 'General Funding Information' section, CoCs should enter their Annual Renewal Demand amount, the amount of their potential bonus funding, the amount of their potential DV bonus funding, and the Tier 1 funding line (the percentage specified for Tier 1 within the annual CoC NOFA). You can find this information in the Estimated ARD report HUD released as part of the CoC Program NOFA process.

In the '**FY2018 HUD CoC Program NOFA Opportunities**' section, CoCs should select the project types they intend to consider for bonus and DV bonus funding. Because NOFA opportunities might be updated, CoCs should ensure that the project types and populations they have selected are eligible in the current CoC NOFA. These selections will be used to prioritize new or expansion projects for bonus and DV bonus funding during the ranking process.

In the '**Funding Ceilings and Priorities by Project Type and Population**' section, CoCs can specify their system needs and the relative priority of different parts of their homeless system for purposes of the CoC Program application.

For each project type/population combination, the CoC can specify the **maximum number of beds** (renewal and new combined), **maximum level of funding**, and **relative priority**.

- The easiest parameter to intuitively understand is the **relative priority** of a particular project type or population to target to receive CoC funding. Remember, these should be priorities for use of CoC funds; the populations might be a low priority because the system already has enough capacity of that project type or for that group, or it might be a lower priority because other funds are available to support expansion of the project type.
 - When a CoC conducts system planning, part of the exercise often includes determining the level of inventory needed for the CoC's system – ideally, the CoC will set inventory targets by project type for each major population group (e.g., families, individuals, youth). If a CoC has a particular unmet need, it might also set targets for a specific group (e.g., victims of domestic violence, chronically homeless, veterans, parenting youth). The tool allows the CoC to enter its desired inventory (or level of CoC Program \$ investment) for each major project type and population group. These bed/\$ caps are not required, but if they are entered, the tool will rank projects up to that level and then will ignore projects that will yield excess inventory. The theory is that no matter how high a project scores, the CoC should not recommend it for funding if it doesn't need the inventory. **The tool will only be able to calculate targets and ranking for CoC Program-funded projects, so CoCs should set the targets specifically for CoC Program funding.** The target for beds should represent the number of beds the CoC intends to fund with CoC Program funds (new and renewal projects combined) and the target for \$ should represent the amount of CoC Program funding the CoC intends to invest in that project type. The major population groups are available by default. The CoC can set targets for other listed groups by checking the boxes next to the names of the population group.
- If new projects being considered for DV bonus or bonus funding are not rated as highly as renewal projects for a project type and population or group, the new projects may be initially ranked in the Projects Not Selected for Funding chart. CoCs should carefully review ranking of projects to consider whether other DV bonus or bonus eligible projects would meet a higher need in the Continuum.

- Any or all of the values can be left blank if the CoC has not adopted these types of targets or priorities. If you leave blank Maximum Beds or \$, then projects within that category will not be capped and projects will be ranked solely based on their rating scores up to the Tier 1 and Tier 2 levels. If you leave the table blank, the tool will rank projects by the rating score.

The ranking list will be generated in the following order:

- 1) New and renewal HMIS and SSO-coordinated entry projects will be listed first in Tier 1 because they are required elements of a CoC's system. HUD is not requiring CoCs to list these projects in this position in the final ranking; rather CoCs should set local policies on their relative priority and move them accordingly after the initial ranking is generated.
- 2) New or expansion projects that meet HUD and CoC DV bonus project criteria will be placed by the tool in order of system priority and performance. DV bonus projects are indicated by brown formatting. HUD is not requiring CoCs to accept this placement as the final ranking for DV bonus; rather CoCs should consider the appropriate placement of the projects within Tier 1 and Tier 2.
- 3) New or expansion projects that meet HUD and CoC bonus project criteria will be placed by the tool in order of system priority and performance. Bonus projects are indicated by pink formatting. HUD is not requiring CoCs to accept this placement as the final ranking for bonus projects; rather CoCs should consider the appropriate placement of the projects within Tier 1 and Tier 2.

- 4) Projects in the high priority categories, listed in order of their rating score, up to the maximum number of beds or funding level specified for each project type/population.
- 5) Projects in the medium priority categories, listed in order of their rating score, up to the maximum number of beds or funding level specified for each project type/population.
- 6) Projects in the low priority categories, listed in order of their rating score, up to the maximum number of beds or funding level specified for each project type/population.
- 7) Projects with unspecified priority, listed in order of their rating score.
- 8) Other SSO grants

Projects may exceed the portion of ARD available in Tier 1 and 'straddle' the Tier 1/Tier 2 line. CoCs should carefully review this and the NOFA treatment of scoring and awards of straddle projects. Funding may be adjusted or projects moved to reduce or eliminate the straddle. Projects may also exceed the Tier 2 line which means the projects exceed the funding available to the CoC. Projects that fully exceed the CoCs available funding are listed in the **"Projects Exceeding ARD"** chart.

Projects that exceed the beds or \$ specified on the **'FUNDING CEILINGS + PRIORITIES'** tab will be listed in the **"Projects Not Selected for Funding"** section of the **'FUNDING ANALYSIS + RANKING'** tab because they represent inventory above the needs of the system. The CoC NOFA Committee might consider soliciting additional projects to fill project type and population targets that are not met for this CoC Program NOFA.

Details on the logic used in generating the ranked list can be found in the **'TOOL RESOURCES'** tab.

You will have the chance to adjust the relative ranking for these projects, based on your locally adopted policies, once you begin working on the **'FUNDING ANALYSIS + RANKING'** tab.

After you enter information for each of the three parameters, click the **"Generate Ranking"** button. Please note this process may take several minutes given the processing involved to implement these complex calculations.

TAB: FUNDING ANALYSIS AND RANKING

This tab shows the initial ranking, based on the rating results recorded in earlier sections of the tool and the funding parameters set by the NOFA and the CoC. The worksheet has six sections:

- Summary tallies of amounts allocated within each category
- A Funding Analysis Table that summarizes the units and \$ allocated to each major project type and population group
- A list of projects ranked within Tier 1
- A list of projects ranked within Tier 2 (ARD less the amount allocated in Tier 1 + Bonus + DV project funding)
- A list of projects exceeding ARD
- A list of projects not selected for funding

The tool populates the lists of projects based on the order described under the description of the **'FUNDING CEILINGS + PRIORITIES'** tab. The section labeled, **"Projects Exceeding ARD"** includes projects that meet the CoC's priorities for ranking but exceed the available funding. The section labeled, **"Projects not Selected for Funding"** includes:

- projects deemed ineligible because they did not meet all threshold requirements
- projects that were not ranked based on the bed and \$ caps entered in the **'FUNDING CEILINGS + PRIORITIES'** tab
- projects that were eligible for renewal but were reallocated

Use the arrows to adjust rank order. The tool provides CoCs flexibility to adjust ranking order to implement local funding priorities or CoC Program NOFA provisions that are not addressed within the tool. Click the **up/down** arrows to the left of individual projects to move it up or down within the ranked list. If you move a project to a new funding tier or out of the **"Projects Not Selected for Funding"** section, the summaries and Funding Analysis table at the top will automatically adjust. If you want to reset to the initial ranking values or change funding priorities and generate the initial ranking again, you can return to the **'FUNDING CEILINGS AND PRIORITIES'** tab and click **"Generate Ranking"**. Clicking **"Generate Ranking"** will erase the changes you made, so you might consider saving a copy of your adjusted rankings before resetting.

The **"Funding Analysis Table"** under the summary tallies shows the number of beds and the funding allocated by project type and population and how these amounts compare to the bed and \$ caps established on the **'FUNDING CEILINGS + PRIORITIES'** tab. HUD does not guarantee that CoCs will receive their requested Bonus, DV Bonus, Tier 1 or Tier 2 funding based on the use of this tool. To view more rows on the screen, hide the **"Funding Analysis Table"** by clicking **"Show/Hide Funding Analysis Table"** at the top of the page.

As projects are ranked, the summary tallies at the top of the screen will show the amount of DV Bonus funding, bonus funding, Tier 1 funding, and Tier 2 (Remaining ARD+Bonus+DV Bonus funding) funding that has been committed in the tool so far. The totals are based on the CoC Funding Recommended amounts for each project, which are initially populated with the amounts entered for **"CoC Funding Requested"** on the **'LIST OF PROJECTS TO BE REVIEWED'** tab.

It is possible that an initial ranking might leave uncaptured funds in one or both of the Tiers, such as when the CoC does not have eligible projects that meet its defined bonus or DV bonus priorities. More likely, a CoC will have projects it is interested in funding that fall outside of Tier 1 and Tier 2, projects in this situation can be found in the Projects Exceeding ARD section of the table. CoCs should also review the Projects Not Selected for Funding chart to verify that the projects exceeding the CoC's funding ceiling and priorities should be reallocated to allow projects serving other priorities to be funded.

CoCs can change the amount of the CoC Funding Request by entering a new "**CoC Funding Recommendation**" amount in the green column. When determining how much to recommend for CoC awards, the CoC should review CoC grant amounts expended in prior years to determine whether there are any grantees that underspend their awards. When you revise recommended funding amounts, the summary and widget totals adjust accordingly. To adjust the allocation of projects in the Tier 1 and Tier 2 lists after changing funding levels for projects in the green column, click the "**Adjust Projects in Tiers after Funding Changes**" button in the top right corner of the tab (you may need to move the screen to the right to be able to see the button). The Tool will pull a new project into either Tier 1 or Tier 2 if there is any funding available in the Tier potentially creating a 'straddle' project.

Once CoCs have finalized the ranking of projects in Tier 1 and Tier 2, they should review the funding level in each Tier in the summary tallies to ensure that the totals are not above or below available funding levels. The suggested order to reconcile funding amounts would be DV bonus projects, bonus projects, Tier 1 with consideration of any straddle amount, and then Tier 2. Amounts made available through reallocation are not separately accounted for in the tallies, CoCs should ensure that reallocated funds are expended by checking the Tier 1 and Tier 2 tallies.

The table can be printed to communicate recommended ranking results to applicants and CoC stakeholders, and CoCs can use them to prepare annual CoC Program application materials for HUD.

Navigation Pane

Version 3.2

GENERAL	ABOUT THE TOOL	TOOL RESOURCES	RAW HIC DATA	LIST OF PROJECTS TO BE REVIEWED			
RATING	CUSTOMIZE RATING CRITERIA	RENEW. + EXP. THRESHOLD	RENEW. + EXP. RATING TOOL	NEW PROJECTS THRESHOLD	NEW PROJECTS RATING TOOL	ALTERNATIVE RATING TOOL	RATING RESULTS
RANKING	FUNDING CEILINGS + PRIORITIES	FUNDING ANALYSIS + RANKING					

CoC THRESHOLD REQUIREMENTS DEFINITIONS

The Tool contains 11 suggested CoC threshold requirements. The CoC Threshold Requirements Definition Chart provides a general definition of each requirement. CoCs can update these definitions to be consistent with local requirements including increasing threshold requirements as appropriate. The CoC will need to establish local policies or standards to determine what is an acceptable response to the requirement.

CoC Threshold Requirement	Definition
Coordinated Entry Participation	The project participates or intends to participate in coordinated entry in compliance with the CoC's Coordinated Entry Policies and Procedures and HUD's Coordinated Entry Notice.
Housing First and/or Low Barrier Implementation	The project is, or intends to be, designed and implemented using Housing First principles including: no preconditions or barriers to entry except as required by funding sources, and provision of necessary supports to maintain housing and prevent a return to homelessness.
Documented, secured minimum match	Applicant has match commitments that satisfy CoC Program Rule requirements for source and amount.
Project has reasonable costs per permanent housing exit as defined locally	Cost per permanent housing exit can be determined by dividing total project costs by the number of permanent housing exits. These costs can be averaged across all projects within a project type to determine the average cost per permanent housing exit for the community for that project type. The CoC can use this information to define a reasonable cost locally.
Project is financially feasible	Project has funding commitments equal to or exceeding project budget.
Applicant is active CoC Participant	Applicant participation in CoC Board and committee meetings meets CoC requirements for a member in good standing.
Application is complete and data are consistent	All required information is completed and all required attachments are provided. Data provided in response to different questions match.
Data quality at or above 90%	Data elements required by HUD and the CoC have a 90% or higher completion rate.
Bed/unit utilization rate at or above 90%	Beds or units in the project are occupied 90% or more of the operating year.
Acceptable organizational audit/financial review	Applicant's audit or financial review does not contain findings or other indications of financial or accounting problems.
Documented organizational financial stability	Applicant's financial statements for previous fiscal year demonstrates financial stability sufficient to support operation of the project during the next operating year.

SOURCE OF DATA FOR RATING CRITERIA

CoCs can evaluate project compliance with CoC and HUD requirements and project performance through review of data, project documents and project operations. The suggested data sources for the rating criteria included in the tool are listed below as a resource for CoCs when they are customizing the rating templates in the "Customize Rating Criteria" tab. If available, a CoC can use a local report to evaluate performance.

PERFORMANCE MEASURES		
Project Type	Rating Factor	Data Source
Length of Stay		
RRH	On average, participants spend XX days from project entry to housing move-in	CAPER Q22c - The CAPER can be run for CoC Program funded projects.
TH	On average, participants stay in project XX days	APR Q22b
Exit to Permanent Housing		
RRH	Minimum percent move to permanent housing	APR Q23a & Q23b
PSH	Minimum percent remain in or move to permanent housing	Calculation: 1) Subtract leavers to all destinations (APR Q23a and Q23b) from number of participants (APR Q7) to determine number of stayers; 2) Add leavers to permanent housing destinations (APR Q23a & Q23b); 3) Add stayers (Step 1) and leavers to permanent housing destinations (Step 2) and divide by number of participants (APR Q7)
TH	Minimum percent move to permanent housing	APR Q23a & Q23b
Returns to Homelessness		
RRH, PSH, TH	Maximum percent of participants return to homelessness within 12 months of exit to permanent housing	Local data if available
New or Increased Income or Earned Income		
RRH, PSH, TH	Minimum percent of participants with new or increased earned income for project stayers	APR Q19a1 (This question only collects information for participants who have been in the project for 365+ days. A local report with more complete data can be substituted.)
RRH, PSH, TH	Minimum percent of participants with new or increased non-employment income for project stayers	APR Q19a1 (This question only collects information for participants who have been in the project for 365+ days. A local report with more complete data can be substituted.)
RRH, PSH, TH	Minimum percent of participants with new or increased earned income for project leavers	APR Q19a2
RRH, PSH, TH	Minimum percent of participants with new or increased non-employment income for project leavers	APR Q19a2
SERVE PRIORITY POPULATIONS		
Project Type	Rating Factor	Data Source
Coordinated Assessment Score		
TH	XX% of participants meet CoC's TH targeting criteria	Local data if available
RRH	Assessment score for XX% of participants indicate RRH or more intensive intervention	Local data if available
PSH	Assessment score for participants indicates PSH with XX% at highest end of PSH	Local data if available
Project Focuses on Chronically Homeless People		
TH	XX% of participants are chronically homeless	Calculate percent using data in APR Q26a
RRH	XX% of participants are chronically homeless	Calculate percent using data in APR Q26a
PSH	XX% of participants are chronically homeless	Calculate percent using data in APR Q26a

TOOL RESOURCES

APR data on ≥ 50% disability /zero income/unsheltered		
TH	Minimum percent of participants with zero income at entry	APR Q16
TH	Minimum percent of participants with more than one disability type	APR Q13a2
TH	Minimum percent of participants entering project from place not meant for human habitation	APR Q15
RRH	Minimum percent of participants with zero income at entry	APR Q16
RRH	Minimum percent of participants with more than one disability type	APR Q13a2
RRH	Minimum percent of participants entering project from place not meant for human habitation	APR Q15
PSH	Minimum percent of participants with zero income at entry	APR Q16
PSH	Minimum percent of participants with more than one disability type	APR Q13a2
PSH	Minimum percent of participants entering project from place not meant for human habitation	APR Q15
PROJECT EFFECTIVENESS		
Project Type	Rating Factor	Data Source
RRH, PSH, TH	Project has reasonable costs per permanent housing exit	Divide total project costs (collected from each project using a standardized tool that accounts for housing, services and administrative costs) by number of permanent housing exits (APR Q23a + Q23b)
RRH, PSH, TH	Coordinated Entry Participation - Minimum percent of entries to project from CE referral (or alternative system for DV projects)	Local data if available
RRH, PSH, TH	Housing First and/or Low Barrier Implementation	CoC assessment of fidelity to Housing First from CoC monitoring or review of project policies and procedures
OTHER AND LOCAL CRITERIA		
Project Type	Rating Factor	Data Source
Project is Operating in Conformance with CoC Standards		
RRH, PSH, TH	CoC monitoring score	CoC monitoring process results
RRH, PSH, TH	Applicant narrative that CoC scores	CoC rating process

FUNDING ANALYSIS TAB LOGIC

DETERMINING PROJECT PRIORITY

The programming for the '**FUNDING ANALYSIS + RANKING**' tab applies the following logic to the project type and population targets indicated in the '**FUNDING CEILINGS + PRIORITIES**' tab to determine the rank order of the projects based on the priorities indicated.

Ratio of Beds within a Project	How Priority is Determined
If a Project has any beds dedicated to a subpopulation...	
1. Does the project have DV beds?	<ul style="list-style-type: none"> The project is ranked based on the relevant DV priority (e.g., DV Fam, DV Ind)
2. Does the project have at least 50% of its total beds dedicated to CH Fam, CH Ind, Vet Fam, Vet Ind OR Parenting Youth?	<ul style="list-style-type: none"> The project is ranked based on that subpopulation's priority. If multiple subpopulations meet the 50+% threshold, ranking is based on the highest ranked of the subpopulations.
3. Even though no one subpopulation meets the 50% threshold, is the sum of dedicated beds 50% or greater?	<ul style="list-style-type: none"> Both subpopulation and population priorities are ignored for ranking purposes. The project is ranked with other projects that meet unspecified priorities
4. Is the sum of dedicated beds less than 50%?	<ul style="list-style-type: none"> Subpopulation priorities are ignored for ranking purposes. The project is ranked solely based on the overarching population priorities
If a Project doesn't have any beds dedicated to a subpopulation...	
Does the project target > 50% of its beds to Families OR Individuals?	The project is ranked based on the Priority and Funding Ceilings of the Majority Population
Does the project evenly target two populations (50%/50%)?	Ranking is based on the Priority and Funding Ceilings of the Highest Ranked Population (Fam, Ind)
If a Project is Eligible for Bonus or DV Funding...	
1. Is there bonus (or reallocated) funding remaining?	<ul style="list-style-type: none"> The project is highlighted in pink
2. Is there DV bonus funding remaining?	<ul style="list-style-type: none"> The project is highlighted in brown

ALLOCATING BEDS

The programming for the '**FUNDING ANALYSIS + RANKING**' tab uses the following logic to allocate beds and \$ to the funding targets indicated on the '**FUNDING CEILINGS + PRIORITIES**' tab.

Ratio of Beds within a Project	How Subpopulation Bed/\$ Counts are Allocated	How "All Families" and "All Individuals" Bed/\$ Counts are Allocated	How funding caps are allocated	Notes
If a Project does not have any beds dedicated to a subpopulation....				
	N/A	All beds are counted for their assigned population group	All \$ are counted for their assigned population group, pro-rated by beds	

TOOL RESOURCES

If a Project has any beds dedicated to a subpopulation...				
1. Does the project have DV beds?	Beds are allocated to the DV need (e.g., DV Fam, DV Ind)	Beds are not allocated to All Fam need or All Ind need (since they would not be able to meet the needs of non-DV Fam or non-DV Ind)	\$ are allocated to the DV need (e.g., DV Fam, DV Ind), prorated by beds	If DV is selected, Tool assigns all of the Population Beds (e.g., Fam or Ind) to DV
2. Does the project have at least 50% of its beds dedicated to CH Fam, CH Ind, Vet Fam, Vet Ind OR Parenting Youth?	Subpopulation beds are counted within their specific subpopulation category. <i>E.g., if a 100 bed project for Individuals has 25 beds for CH and 25 beds for Vets, 25 beds would count toward the CH cap and 25 beds could count toward the Vet cap.</i>	After subtracting the sum of any dedicated beds, the remaining Fam or Ind beds are counted within their specific Population category <i>E.g., if a 100 bed project for Individuals has 25 beds for CH and 25 beds for Vets, 50 beds would count toward All Ind cap.</i>	All subpopulation \$ is prorated based on the beds, and then counted within their specific subpopulation category. <i>E.g., if a 100 bed project for Individuals has 25 beds for CH and 25 beds for Vets, 25% of the total would be counted toward CH, 25% for Vets, and 50% for All Ind.</i>	The tool does not attempt to reconcile overlapping criteria, therefore a project that is 100% dedicated to CH and Vets will be counted as meeting both the Vet and CH criteria. Your CoC may need to manually adjust ranking if the projects with combined eligibility criteria do not adequately meet identified system needs.
3. Even if no single subpopulation meets the 50% threshold, is the sum of dedicated beds 50% or greater than the total project beds?				
4. Is the sum of dedicated beds less than 50%?				

Paste in This Cell ↓				After pasting your CoC's raw HIC data below, click on this button to generate the list of projects to be reviewed. If you prefer not to use the raw HIC data, skip this tab and proceed directly to the LIST OF PROJECTS TO BE REVIEWED tab to enter project data directly.															
Row #	Year	Proj. Type	Organization Name	Project Name	Geo Code	Inventory Type	Bed Type	Target Pop. A	Target Pop. B	Beds HH w/ Children	Units HH w/ Children	Beds HH w/o Children	Beds HH w/ only Children	Veteran Beds HH w/ Children	Youth Beds HH w/ Children	CH Beds HH w/ Children	Veteran Beds HH w/o Children	Youth Beds HH w/o Children	CH Beds HH w/o Children
330102	2018	RRH	Carson Valley Children's Aid	Norristown Housing Resource Center	429091	C	SMF+HC	NA		75	23	47	0	0	0		0	0	
330104	2018	PSH	Family Services	Supportive Housing for Persons with Disabilities - HOPWA	429091	C	SMF+HC	HIV		0	0	8	0	0	0		0	0	0
330105	2018	PSH	Family Services	Supportive Housing Leasing Program for Persons with Disabilities	429091	C	SMF+HC	HIV		22	7	37	0	0	0	0	0	0	3
351323	2018	ES	FEMA	Hotel Voucher	429091	C	Voucher beds			0	0	0	0	0					
330106	2018	PSH	Hedwig House	Shelter Liaison	429091	C	SMF+HC	NA		11	3	14	0	0	0	0	0	0	3
330082	2018	TH	Inter-Faith Housing Alliance	Hope Gardens	429091	C	HC	NA		44	8	0	0	0	0		0	0	
330081	2018	ES	Inter-Faith Housing Alliance	Inter-Faith Hospitality Network - Emergency Shelter	429091	C	Other beds	HC	NA	10	3	0	0	0	0		0	0	
330083	2018	ES	Inter-Faith of the Mainline	Inter-Faith Hospitality Network - Emergency Shelter	429091	C	Other beds	HC	NA	17	4	0	0	0	0		0	0	
330085	2018	ES	Keystone Opportunity Center	Inter-Faith Hospitality Network Emergency Shelter	429091	C	Other beds	HC	NA	10	3	0	0	0	0		0	0	
330084	2018	RRH	Keystone Opportunity Center	North Penn Housing Resource Center	429091	C	SMF+HC	NA		44	13	15	0	0	0		0	0	
349044	2018	PSH	Keystone Opportunity Center	PSH-Keystone	429091	N	SMF	NA		0	0	3	0	0	0	0	0	0	3
330090	2018	PSH	Laurel House	Permanent Supportive Housing	429091	C	HC	DV		6	2	0	0	0	0	0	0	0	0
330088	2018	ES	Laurel House	Shelter	429091	C	Facility-bas	SFHC	DV	24	9	0	0	0	0		0	0	
330089	2018	TH	Laurel House	Transitional	429091	C		DV		15	5	0	0	0	0		0	0	
330092	2018	ES	Main Street Ministries	Pottstown Code Blue Shelter	429091	C	Facility-bas	SMF	NA	0	0	0	0	0	0		0	0	
330093	2018	TH	Mental Health Assoc. of PA.	Halfway There	429091	C		SMF	NA	0	0	16	0	0	0		0	0	
330094	2018	ES	Missionaries of Charity	Sister's of Charity Emergency Shelter	429091	C	Facility-bas	SFHC	NA	0	0	13	0	0	0		0	0	
330095	2018	PSH	Montgomery County BH/DD	Horizon House S+C Act II	429091	C		SMF	NA	0	0	4	0	0	0	0	0	0	4
330099	2018	PSH	Montgomery County BH/DD	Penn Foundation S+C	429091	C		SMF+HC	NA	3	1	10	0	0	0	0	0	0	0
330096	2018	PSH	Montgomery County BH/DD	Permanent Solutions -1 (Columbus Properties)	429091	C		SMF	NA	0	0	22	0	0	0		0	0	22
330097	2018	PSH	Montgomery County BH/DD	Permanent Solutions -2 (Columbus Properties)	429091	C		SMF+HC	NA	9	4	22	0	0	0	9	0	0	22
330098	2018	PSH	Montgomery County BH/DD	Project Vesta	429091	C		SMF	NA	0	0	11	0	0	0	0	0	0	11
330100	2018	RRH	Pottstown Cluster of Religious Communities	Pottstown Housing Resource Center	429091	C		SMF+HC	NA	129	33	28	0	0	0		0	0	
330101	2018	ES	Resources for Human Development	Coordinated Homeless Outreach Center Single Adult Shelter	429091	C	Facility-bas	SMF	NA	0	0	52	0	0	0		0	0	
330110	2018	PSH	Salvation Army Norristown	Disabled Individuals	429091	C		SMF+HC	NA	0	0	6	0	0	0	0	0	0	6
330108	2018	ES	Salvation Army Norristown	Norristown Family Emergency Shelter	429091	C	Facility-bas	HC	NA	28	7	0	0	0	0		0	0	
349054	2018	PSH	Salvation Army Norristown	PSH2	429091	C		SMF+HC	NA	12	4	5	0	0	0	12	0	0	5
330109	2018	ES	Salvation Army Norristown	Winter Shelter, SA-Norristown	429091	C	Facility-bas	SF	NA	0	0	0	0	0	0		0	0	
347976	2018	PSH	Salvation Army Pottstown	Permanent Supportive Housing, SA-Pottstown	429091	N		SMF+HC	NA	21	4	2	0	0	0	21	0	0	2
330111	2018	ES	Salvation Army Pottstown	Pottstown Emergency Shelter	429091	C	Facility-bas	HC	NA	44	11	0	0	0	0		0	0	
330113	2018	ES	Trinity Lutheran Church, Lansdale	Code Blue Shelter	429091	C	Other beds	SM	NA	0	0	0	0	0	0		0	0	
330114	2018	RRH	Valley Youth House	CoC Rapid Re-Housing Program for Families	429091	C		YMF	NA	28	10	0	0	0	28		0	0	
349901	2018	RRH	Veterans Multi-Service Center	VMC SSVF Program - RRRH	429091	C		SMF+HC	NA	0	0	2	0	0	0		2	0	

[illegible]

Paste in This Cell ↓																												
Row #	McKinney- Vento: EsqRrh	McKinney- Vento: Coc	McKinney- Vento: CocSh	McKinney- Vento: CocTh	McKinney- Vento: CocPsh	McKinney- Vento: CocRrh	McKinney- Vento: CocSro	McKinney- Vento: SpC	McKinney- Vento: SB	McKinney- Vento: Shp	Year-Round Beds	HMIS Beds HH w/ Children	HMIS Beds HH w/o Children	HMIS Beds HH w/ only Children	% of HMIS Beds HH with Children	% of HMIS Beds HH without Children	% of HMIS Beds HH w/ only Children	Total Seasonal Beds	Seasonal Beds Available in HMIS	Availability Start Date	Availability End Date	Overflow Beds	HMIS Overflow Beds	PIT Count	Total Beds	Utilization Rate	Last Update On	
330102	No	No	No	No	No	No	No	No	No	No	122	75	47	0	1	1									122	122	1	43216.64
330104	No	No	No	No	No	No	No	No	No	No	8	0	8	0		1									8	8	1	43215.67
330105	No	Yes	No	No	Yes	No	No	No	No	No	59	22	37	0	1	1									59	59	1	43216.51
351323	No										0	0	0	0									3	0	3	3	1	43283.42
330106	No	Yes	No	No	Yes	No	No	No	No	No	25	11	14	0	1	1									17	25	0.68	43216.51
330082	No	No	No	No	No	No	No	No	No	No	44	44	0	0	1										23	44	0.52	43215.66
330081	No	No	No	No	No	No	No	No	No	No	10	10	0	0	1				0	0			0	0	13	10	1.3	43214.41
330083	No	No	No	No	No	No	No	No	No	No	17	17	0	0	1				0	0			0	0	7	17	0.41	43214.41
330085	No	No	No	No	No	No	No	No	No	No	10	10	0	0	1				0	0			0	0	7	10	0.7	43214.41
330084	No	Yes	No	No		Yes	No	No	No	No	59	44	15	0	1	1									59	59	1	43216.66
349044		Yes			Yes						3	0	3	0		1									2	3	0.67	43216.45
330090	No	No	No	No	No	No	No	No	No	No	6	0	0	0											4	6	0.67	43216.51
330088	No	No	No	No	No	No	No	No	No	No	24	0							0	0			0	0	18	24	0.75	43214.42
330089	No	No	No	No	No	No	No	No	No	No	15	0	0	0											12	15	0.8	43214.46
330092	No	No	No	No	No	No	No	No	No	No	0	0	0	0					15	0	43040	43190	0	0	12	15	0.8	43283.41
330093	No	No	No	No	No	No	No	No	No	No	16	0	16	0		1									10	16	0.62	43216.66
330094	No	No	No	No	No	No	No	No	No	No	13	0	0	0					0	0			0	0	9	13	0.69	43214.42
330095	No	Yes	No	No	Yes	No	No	No	No	No	4	0	4	0		1									4	4	1	43216.45
330099	No	Yes	No	No	Yes	No	No	No	No	No	13	3	10	0	1	1									13	13	1	43216.44
330096	No	Yes	No	No	Yes	No	No	No	No	No	22	0	22	0		1									22	22	1	43216.51
330097	No	Yes	No	No	Yes	No	No	No	No	No	31	9	22	0	1	1									31	31	1	43216.51
330098	No	Yes	No	No	Yes	No	No	No	No	No	11	0	11	0		1									11	11	1	43216.51
330100	Yes	Yes	No	No	No	Yes	No	No	No	No	157	129	28	0	1	1									157	157	1	43216.68
330101	No	No	No	No	No	No	No	No	No	No	52	0	52	0		1			0	0			8	8	57	60	0.95	43214.42
330110	No	Yes	No	No	Yes	No	No	No	No	No	6	0	6	0		1									6	6	1	43216.46
330108	No	No	No	No		No	No	No	No	No	28	28	0	0	1				0	0			10	10	38	38	1	43214.43
349054		Yes			Yes						17	12	5	0	1	1									17	17	1	43216.46
330109	No	No	No	No	No	No	No	No	No	No	0	0	0	0					20	20	43040	43220	0	0	20	20	1	43214.42
347976		Yes			Yes						23	21	2	0	1	1									23	23	1	43216.51
330111	No	No	No	No	No	No	No	No	No	No	44	44	0	0	1				0	0			11	11	32	55	0.58	43214.43
330113	No	No	No	No	No	No	No	No	No	No	0	0	0	0					0	0			15	0	10	15	0.67	43214.43
330114	No	Yes	No	No		Yes	No	No	No	No	28	28	0	0	1										28	28	1	43216.46
349901	No										2	0	2	0		1									2	2	1	43217.39

LIST OF PROJECTS TO BE REVIEWED

Sort projects by:

Organization Name

You can sort the project list below using the drop down selection to the left. Please note that you cannot sort by "Renewal, New, Expansion...." until you have completed the green section of this form

Use your Grant Inventory Worksheet and project spending records to complete these columns

☒ Check o
listed fo

Project ID	Organization Name	Project Name	Project Type	McKinney-Vento	Grant Number	CoC Amount Awarded Last Operating Year	CoC Amount Expended Last Operating Year	CoC Funding Requested	Renewal, New, Expansion, Reallocate, Ignore	Geo Code	DV/H IV	All Fam Beds
34	County of Montgomery, PA	HMIS Dedicated Project	HMIS	Yes	tbd	\$ 139,242	\$ 139,242	\$ 139,242	Renewal			
3	Family Services	Supportive Housing Leasing Program for Persons with Disabilities	PSH	Yes	SF-424	\$ 350,015	\$ 329,061	\$ 350,015	Renewal	429091	HIV	22
5	Hedwig House	Shelter Liaison	PSH	Yes	PA0133L3T041710	\$ 189,898	\$ 158,918	\$ 189,989	Renewal	429091	NA	11
10	Keystone Opportunity Center	North Penn Housing Resource Center	RRH	Yes	PA0625L3T041805	\$ 281,636	\$ 281,636	\$ 281,636	Renewal	429091	NA	44
11	Keystone Opportunity Center	PSH-Keystone	PSH	Yes	PA0799L3T041802	\$ 45,846		\$ 46,386	Renewal	429091	NA	0
35	Montgomery County BH/DD	Coordinated Homeless Outreach Center	SSO	Yes	PA0127L3T041710	\$ 276,509	\$ 276,509	\$ 276,509	Renewal	429091	NA	0
18	Montgomery County BH/DD	Horizon House S+C Act II	PSH	Yes	PA0646L3T041705	\$ 26,064	\$ 24,456	\$ 26,064	Renewal	429091	NA	0
19	Montgomery County BH/DD	Penn Foundation S+C	PSH	Yes	PA0575L3T041702	\$ 103,028	\$ 93,864	\$ 103,028	Renewal	429091	NA	3
21	Montgomery County BH/DD	Permanent Solutions - 2 (Columbus Properties)	PSH	Yes	PA0549L3T041707	\$ 326,497	\$ 326,497	\$ 326,497	Renewal	429091	NA	9
22	Montgomery County BH/DD	Project Vesta	PSH	Yes	PA0550L3T041707	\$ 78,192	\$ 78,192	\$ 78,192	Renewal	429091	NA	0
36	Pottstown Cluster of Religious Commu	Pottstown HRC Rapid Rehousing 2014	RRH	Yes	PA0700L3T041703	\$ 52,432	\$ 52,432	\$ 52,432	Renewal	429091	NA	26
37	Pottstown Cluster of Religious Commu	Pottstown HRC Rapid Rehousing 2015	RRH	Yes	PA0767L3T041702	\$ 402,010	\$ 402,010	\$ 402,886	Renewal	429091	NA	103
25	Salvation Army Norristown	Disabled Individuals	PSH	Yes	PA0136L3T041710	\$ 102,290	\$ 95,372	\$ 102,290	Renewal	429091	NA	0
27	Salvation Army Norristown	PSH2	PSH	Yes	PA0766L3T041702	\$ 215,816	\$ 131,925	\$ 215,816	Renewal	429091	NA	12
29	Salvation Army Pottstown	Permanent Supportive Housing, SA-Pottstown	PSH	Yes	PA0798L3T041701	\$ 184,334	\$ 167,833	\$ 184,334	Renewal	429091	NA	21
32	Valley Youth House	CoC Rapid Re-Housing Program for Families	RRH	Yes	PA0687L3T041703	\$ 112,028	\$ 112,028	\$ 112,028	Renewal	429091	NA	28
38	Carson Valley Children's Aid	Rapid Rehousing for Families of Young Children	RRH	Yes	n/a	\$ -	\$ -	\$ 181,403	New	429091	NA	40
39	Keystone Opportunity Center	Keystone Rapid Rehousing Expand 2018	RRH	Yes	n/a	\$ -	\$ -	\$ 187,616	Expansion	429091	NA	59
40	Laurel House	Rapid Rehousing for Victims of Domestic Abuse	RRH	Yes	n/a	\$ -	\$ -	\$ 243,608	New	429091	DV	70
41	HOPE, Incorporated	Project RESET	RRH	Yes	n/a	\$ -	\$ -	\$ 132,000	New	429091	NA	0
42	Valley Youth House	TH-RRH for Montgomery County Young Adults	TH/RRH	Yes	n/a	\$ -	\$ -	\$ 137,000	New	429091	NA	0
43	Women's Center of Montgomery Coun	WCMC Domestic Violence Transitional Housing Project	TH/RRH	Yes	n/a	\$ -	\$ -	\$ 170,000	New	429091	DV	25

LIST OF PROJECTS TO BE REVIEWED

= Auto-populated cell. Cannot be edited

Once you have confirmed the bed inventory listed for the projects below is consistent with the number of beds for each project in your CoC's Grant Inventory Worksheet.

Project ID	DV Fam Beds	CH Fam Beds	Vet Fam Beds	Par Youth Beds	Beds HH w/o Children	Beds HH w/ only Children	All Ind Beds	DV Ind Beds	CH Beds HH w/o Children	CH Beds HH w/ only Children	Total CH Ind Beds	Vet Ind Beds	Single Youth Beds	Is 100% Dedicated + or CH Fam (Yes/No)	Is 100% Dedicated + or CH Ind (Yes/No)	Is 100% DV (Yes/No)	CH Bed Inventory (PSH Only)	Vet Bed Inventory	Youth Bed Inventory
34	0							0						No	No	No	0	0	0
3	0	0	0	0	37	0	37	0	3	0	3	0	0	No	No	No	3	0	0
5	0	0	0	0	14	0	14	0	3	0	3	0	0	No	No	No	3	0	0
10	0	0	0	0	15	0	15	0	0	0	0	0	0	No	No	No	0	0	0
11	0	0	0	0	3	0	3	0	3	0	3	0	0	No	Yes	No	3	0	0
35	0	0	0	0	52	0	52	0	0	0	0	0	0	No	No	No	0	0	0
18	0	0	0	0	4	0	4	0	4	0	4	0	0	No	Yes	No	4	0	0
19	0	0	0	0	10	0	10	0	0	0	0	0	0	No	No	No	0	0	0
21	0	9	0	0	42	0	42	0	42	0	42	0	0	Yes	Yes	No	51	0	0
22	0	0	0	0	11	0	11	0	11	0	11	0	0	No	Yes	No	11	0	0
36	0	0	0	0	6	0	6	0	0	0	0	0	0	No	No	No	0	0	0
37	0	0	0	0	22	0	22	0	0	0	0	0	0	No	No	No	0	0	0
25	0	0	0	0	6	0	6	0	6	0	6	0	0	No	Yes	No	6	0	0
27	0	12	0	0	5	0	5	0	5	0	5	0	0	Yes	Yes	No	17	0	0
29	0	21	0	0	2	0	2	0	2	0	2	0	0	Yes	Yes	No	23	0	0
32	0	0	0	28	0	0	0	0	0	0	0	0	0	No	No	No	0	0	28
38	0	0	0	0	0	0	0	0	0	0	0	0	0	No	No	No	0	0	0
39	0	0	0	0	0	0	0	0	0	0	0	0	0	No	No	No	0	0	0
40	70	0	0	0	0	0	0	0	0	0	0	0	0	No	No	Yes	0	0	0
41	0	0	0	0	20	0	20	0	0	0	0	0	0	No	No	No	0	0	0
42	0	0	0	0	8	0	8	0	0	0	0	0	8	No	No	No	0	0	8
43	25	0	0	0	0	0	0	0	0	0	0	0	0	No	No	Yes	0	0	0

NAVIGATION

- ☒ GO Customize Threshold Requirements
- ☒ GO Customize Renewal/Expansion Project Rating Tool
- ☒ GO Customize New Project Rating Tool

CUSTOMIZE NEW AND RENEWAL/EXPANSION PROJECT THRESHOLD REQUIREMENTS

CoC Threshold Requirements

(Delete the X in the box next to any requirements you do not wish to include.)

- ☒ Coordinated Entry Participation
- ☒ Housing First and/or Low Barrier Implementation
- ☒ Documented, secured minimum match
- ☒ Project has reasonable costs per permanent housing exit, as defined locally
- ☒ Project is financially feasible
- ☒ Applicant is active CoC participant
- ☒ Application is complete and data are consistent
- ☒ Data quality at or above 90%
- ☒ Bed/unit utilization rate at or above 90%
- ☒ Acceptable organizational audit/financial review
- ☒ Documented organizational financial stability

(The first five requirements are re
either as Threshold Requirement

CUSTOMIZE RENEWAL/EXPANSION PROJECT RATING TOOL

Using the drop-down menu on the left customize rating factors for each project type or delete the type to view all factors at once.

Delete the X in the box besides any rating factor you do not wish to include. If desired, adjust the factor/goal and point value for each measure. You can add additional locally-defined criteria below. See the D Source Chart for information about where to obtain data to use in scoring.

Performance Measures

Length of Stay

- ☒ RRH - On average, participants spend XX days from project entry to residential move-in
- ☐ PSH - On average, participants stay in project XX days
- ☐ TH - On average, participants stay in project XX days

Factor/Goal

Max Point Value

30 days 20 points

Exits to Permanent Housing

- ☒ RRH - Minimum percent move to permanent housing
- ☒ PSH - Minimum percent remain in or move to permanent housing
- ☐ TH - Minimum percent move to permanent housing

75 % 25 points95 % 25 points

Returns to Homelessness (if data is available for project)

- ☒ RRH - Maximum percent of participants return to homelessness within 12 months of exit to permanent housing

10 % 15 points

CUSTOMIZE RATING CRITERIA

<input checked="" type="checkbox"/>	PSH - Maximum percent of participants return to homelessness within 12 months of exit to permanent housing	<u>10</u> %	<u>15</u> points
<input type="checkbox"/>	TH - Maximum percent of participants return to homelessness within 12 months of exit to permanent housing		

New or Increased Income and Earned Income

<input checked="" type="checkbox"/>	RRH - Minimum new or increased earned income for project stayers	<u>15</u> %	<u>2.5</u> points
<input checked="" type="checkbox"/>	PSH - Minimum new or increased earned income for project stayers	<u>15</u> %	<u>2.5</u> points
<input type="checkbox"/>	TH - Minimum new or increased earned income for project stayers		
<input checked="" type="checkbox"/>	RRH - Minimum new or increased non-employment income for project stayers	<u>30</u> %	<u>2.5</u> points
<input checked="" type="checkbox"/>	PSH - Minimum new or increased non-employment income for project stayers	<u>30</u> %	<u>2.5</u> points
<input type="checkbox"/>	TH - Minimum new or increased non-employment income for project stayers		
<input checked="" type="checkbox"/>	RRH - Minimum new or increased earned income for project leavers	<u>15</u> %	<u>2.5</u> points
<input checked="" type="checkbox"/>	PSH - Minimum new or increased earned income for project leavers	<u>15</u> %	<u>2.5</u> points
<input type="checkbox"/>	TH - Minimum new or increased earned income for project leavers		
<input checked="" type="checkbox"/>	RRH - Minimum new or increased non-employment income for project leavers	<u>30</u> %	<u>2.5</u> points
<input checked="" type="checkbox"/>	PSH - Minimum new or increased non-employment income for project leavers	<u>30</u> %	<u>2.5</u> points
<input type="checkbox"/>	TH - Minimum new or increased non-employment income for project leavers		

Serve High Need Populations

(select from drop-down menu)

<input checked="" type="checkbox"/>	APR data on ≥ 50% disability/zero income/unsheltered		
<input checked="" type="checkbox"/>	RRH - Minimum percent of participants with zero income at entry	<u>50</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	RRH - Minimum percent of participants with more than one disability	<u>50</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	RRH - Minimum percent of participants entering project from place not meant for human habitation	<u>10</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	PSH - Minimum percent of participants with zero income at entry	<u>50</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	PSH - Minimum percent of participants with more than one disability	<u>75</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	PSH - Minimum percent of participants entering project from place not meant for human habitation	<u>10</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	TH - Minimum percent of participants with zero income at entry	<u>50</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	TH - Minimum percent of participants with more than one disability	<u>50</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	TH - Minimum percent of participants entering project from place not meant for human habitation	<u>50</u> %	<u>10</u> points

Project Effectiveness

<input type="checkbox"/>	RRH - Project has reasonable costs per permanent housing exit as defined locally		
<input type="checkbox"/>	PSH - Project has reasonable costs per permanent housing exit as defined locally		
<input type="checkbox"/>	TH - Project has reasonable costs per permanent housing exit as defined locally		
<input checked="" type="checkbox"/>	RRH - Coordinated Entry Participation- Minimum percent of entries to project from CE referral (or alternative system for DV projects)	<u>95</u> %	<u>10</u> points
<input checked="" type="checkbox"/>	PSH - Coordinated Entry Participation- Minimum percent of entries to project from CE referral (or alternative system for DV projects)	<u>95</u> %	<u>10</u> points
<input type="checkbox"/>	TH - Coordinated Entry Participation- Minimum percent of entries to project from CE referral (or alternative system for DV projects)		
<input checked="" type="checkbox"/>	RRH - Housing First and/or Low Barrier Implementation - CoC assessment of fidelity to Housing First from CoC monitoring or review of project policies and procedures	<u>Yes</u>	<u>10</u> points

CUSTOMIZE RATING CRITERIA

<input checked="" type="checkbox"/>	PSH - Housing First and/or Low Barrier Implementation - CoC assessment of fidelity to Housing First from CoC monitoring or review of project policies and procedures	Yes	10	points
<input type="checkbox"/>	TH - Housing First and/or Low Barrier Implementation - CoC assessment of fidelity to Housing First from CoC monitoring or review of project policies and procedures			

Other and Local Criteria

(select from drop-down menu)

CoC Monitoring Score

Project is operating in conformance with CoC Standards

Total Maximum Score		RRH projects:	120	points
		PSH projects:	100	points
		TH projects:	30	points

CUSTOMIZE NEW PROJECT RATING TOOL

Experience	Factor/Goal	Max Point Valu
<div><input checked="" type="checkbox"/> A. Describe the experience of the applicant and sub-recipients (if any) in working with the proposed population and in providing housing similar to that proposed in the application.</div>		15 points
<div><div><input type="checkbox"/> B. Describe experience with utilizing a Housing First approach. Include 1) eligibility criteria; 2) process for accepting new clients; 3) process and criteria for exiting clients. Must demonstrate there are no preconditions to entry, allowing entry regardless of current or past substance abuse, income, criminal records (with exceptions of restrictions imposed by federal, state, or local law or ordinance), marital status, familial status, actual or perceived sexual orientation, gender identity. Must demonstrate the project has a process to address situations that may jeopardize housing or project assistance to ensure that project participation is terminated in only the most severe cases.</div></div>		10 points
<div><input checked="" type="checkbox"/> C. Describe experience in effectively utilizing federal funds including HUD grants and other public funding, including satisfactory drawdowns and performance for existing grants as evidenced by timely reimbursement of subrecipients (if applicable), regular drawdowns, timely resolution of monitoring findings, and timely submission of required reporting on existing grants.</div>		5 points
Design of Housing & Supportive Services		
<div><div><input checked="" type="checkbox"/> A. Extent to which the applicant 1) Demonstrates understanding of the needs of the clients to be served. 2) Demonstrates that type, scale, and location of the housing fit the needs of the clients to be served. 3) Demonstrates that type and scale of the all supportive services, regardless of funding source, meets the needs of clients to be served. 4) Demonstrates how clients will be assisted in obtaining mainstream benefits. 5) Establishes performances measures for housing and income that are objective, measurable, trackable and meet or exceed any established HUD or CoC benchmarks.</div></div>		15 points
<div><input checked="" type="checkbox"/> B. Describe the plan to assist clients to rapidly secure and maintain permanent housing that is safe, affordable, accessible, and acceptable to their needs.</div>		5 points
<div><input checked="" type="checkbox"/> C. Describe how clients will be assisted to increase employment and/or income and to maximize their ability to live independently.</div>		5 points

Timeliness

CUSTOMIZE RATING CRITERIA

☒

A. Describe plan for rapid implementation of the program, documenting how the project will be ready to begin housing the first program participant. Provide a detailed schedule of proposed activities for 60 days, 120 days, and 180 days after grant award.

10

points

Financial

☒

A. Project is cost-effective when projected cost per person served is compared to CoC average within project type.

5

points

☐

B. Organization's most recent audit:

☐

1. Found no exceptions to standard practicess

☐

2. Identified agency as 'low risk'

☐

3. Indicates no findings

☐

C. Documented match amount meets HUD requirements.

☒

D. Budgeted costs are reasonable, allocable, and allowable.

20

points

Project Effectiveness

☒

Coordinated Entry Participation- Minimum percent of entries projected to come from CE referrals

95

%

5

points

Other and Local Criteria

Total Maximum Score

All projects: 95 points

RENEWAL/EXPANSION THRESHOLD REQUIREMENTS

Project Name: √ PSH-Keystone (11)
 Organization Name: Keystone Opportunity Center
 Project Type: PSH
 Project Identifier: 11

Completed projects will be moved to the bottom of the list.

If you would like to change the project type, please do so in the HIC and re-copy the data to the RAW HIC DATA tab, or do so in the LIST OF PROJECTS TO BE REVIEWED.

Renewal/Expansion Projects
Threshold Review Complete

100%

THRESHOLD REQUIREMENTS

YES/NO

Stakeholders should NOT assume all requirements are fully addressed through this tool. CoC Program application requirements change periodically and annual NOFAs may provide more detailed guidance. The CoC collaborative applicant and project applicants should carefully review the annual NOFA criteria each year.

☒ Yes to all

HUD THRESHOLD REQUIREMENTS

1. Applicant has Active SAM registration with current information.

Yes

2. Applicant has Valid DUNS number in application.

Yes

3. Applicant has no Outstanding Delinquent Federal Debts- It is HUD policy, consistent with the purposes and intent of 31 U.S.C. 3720B and 28 U.S.C. 3201(e), that applicants with outstanding delinquent federal debt will not be eligible to receive an award of funds, unless:

(a) A negotiated repayment schedule is established and the repayment schedule is not delinquent, or

(b) Other arrangements satisfactory to HUD are made before the award of funds by HUD.

Yes

4. Applicant has no Debarments and/or Suspensions - In accordance with 2 CFR 2424, no award of federal funds may be made to debarred or suspended applicants, or those proposed to be debarred or suspended from doing business with the Federal Government.

Yes

5. Disclosed any violations of Federal criminal law - Applicants must disclose in a timely manner, in writing to HUD, all violations of Federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the Federal award. Failure to make required disclosures can result in any of the remedies described in 2 CFR §200.338, Remedies for noncompliance, including suspension or debarment. This mandatory disclosure requirement also applies to subrecipients of HUD funds who must disclose to the pass-through entity from which it receives HUD funds.

Yes

6. Submitted the required certifications as specified in the NOFA.

Yes

7. Demonstrated the population to be served meets program eligibility requirements as described in the Act, and project application clearly establishes eligibility of project applicants. This includes any additional eligibility criteria for certain types of projects contained in the NOFA.

Yes

8. Agreed to Participate in HMIS - Project applicants, except Collaborative Applicants that only receive awards for CoC planning costs and, if applicable, UFA Costs, must agree to participate in a local HMIS system. However, in accordance with Section 407 of the Act, any victim service provider that is a recipient or subrecipient must not disclose, for purposes of HMIS, any personally identifying information about any client. Victim service providers must use a comparable database that complies with the federal HMIS data and technical standards. While not prohibited from using HMIS, legal services providers may use a comparable database that complies with federal HMIS data and technical standards, if deemed necessary to protect attorney client privilege.

Yes

9. Met HUD Expectations - When considering renewal projects for award, HUD will review information in eLOCCS; Annual Performance Reports (APRs); and information provided from the local HUD CPD Field Office, including monitoring reports and A-133 audit reports as applicable, and performance standards on prior grants. HUD will also assess renewal projects using the following performance standards in relation to the project's prior grants:

(a) Whether the project applicant's performance met the plans and goals established in the initial application, as amended;

Yes

(b) Whether the project applicant demonstrated all timeliness standards for grants being renewed, including those standards for the expenditure of grant funds that have been met;

Yes

(c) The project applicant's performance in assisting program participants to achieve and maintain independent living and records of success, except HMIS-dedicated projects that are not required to meet this standard; and,

Yes

(d) Whether there is evidence that a project applicant has been unwilling to accept technical assistance, has a history of inadequate financial accounting practices, has indications of project mismanagement, has a drastic reduction

Yes

10. Met HUD financial expectations – If a project applicant has previously received HUD grants, the organization must have demonstrated its ability to meet HUD's financial expectations.

If any of the following have occurred, the project applicant would NOT meet this threshold criteria:

(a) Outstanding obligation to HUD that is in arrears or for which a payment schedule has not been agreed upon;

Yes

(b) Audit finding(s) for which a response is overdue or unsatisfactory;

Yes

(c) History of inadequate financial management accounting practices;

Yes

(d) Evidence of untimely expenditures on prior award;

Yes

(e) History of other major capacity issues that have significantly affected the operation of the project and its performance;

Yes

RENEWAL/EXPANSION THRESHOLD REQUIREMENTS

Project Name: √ PSH-Keystone (11)
 Organization Name: Keystone Opportunity Center
 Project Type: PSH
 Project Identifier: 11

Completed projects will be moved to the bottom of the list.

If you would like to change the project type, please do so in the HIC and re-copy the data to the RAW HIC DATA tab, or do so in the LIST OF PROJECTS TO BE REVIEWED.

Renewal/Expansion Projects
Threshold Review Complete

100%

THRESHOLD REQUIREMENTS

YES/NO

(f) History of not reimbursing subrecipients for eligible costs in a timely manner, or at least quarterly; and

Yes

(g) History of serving ineligible program participants, expending funds on ineligible costs, or failing to expend funds within statutorily established timeframes.

Yes

11. Demonstrated Project is Consistent with Jurisdictional Consolidated Plan(s) - All projects must be consistent with the relevant jurisdictional Consolidated Plan(s). The CoC will be required to submit a Certification of Consistency with the Consolidated Plan at the time of application submission to HUD.

Yes

CoC THRESHOLD REQUIREMENTS

For each requirement, select "Yes" if the project has provided reasonable assurances that the project will meet the requirement, has been given an exception by the CoC or will request a waiver from HUD. Otherwise select "No".

Coordinated Entry Participation

Yes

Housing First and/or Low Barrier Implementation

Yes

Documented, secured minimum match

Yes

Project has reasonable costs per permanent housing exit, as defined locally

Yes

Project is financially feasible

Yes

Applicant is active CoC participant

Yes

Application is complete and data are consistent

Yes

Data quality at or above 90%

Yes

Bed/unit utilization rate at or above 90%

Yes

Acceptable organizational audit/financial review

Yes

Documented organizational financial stability

Yes

RENEWAL/EXPANSION PROJECT RATING TOOL

Project Name: v PSH-Keystone (11)
 Organization Name: Keystone Opportunity Center
 Project Type: PSH
 Project Identifier: 11

[Print Blank Template](#)

[Print Report Card](#)

Renewal/Expansion Projects
 Rating Complete

Met all threshold requirements

100%

[Instructions on Awarding](#)

RATING FACTOR	PERFORMANCE GOAL	PERFORMANCE	POINTS AWARDED
PERFORMANCE MEASURES			
Length of Stay			
Exits to Permanent Housing			
Permanent Supportive-Housing	95% remain in or move to PH	100 %	25 out of
Returns to Homelessness			
Within 12 months of exit to permanent housing	≤ 10% of participants return to homelessness	0 %	15 out of
New or Increased Income and Earned Income			
Earned income for project stayers	15%+ increase	0 %	0.0 out of
Non-employment income for project stayers	30%+ increase	0 %	0.0 out of
Earned income for project leavers	15%+ increase	0 %	0.0 out of
Non-employment income for project leavers	30%+ increase	0 %	0.0 out of
Performance Measures Subtotal			40 out of
SERVE HIGH NEED POPULATIONS			
Permanent Supportive-Housing	≥ 50% of participants with zero income at entry	33.33 %	4 out of
Permanent Supportive-Housing	≥ 75% of participants with more than one disability type	100 %	10 out of
Permanent Supportive-Housing	≥ 10% of participants entering project from place not meant for human habitation	0 %	0 out of
Serve High Need Populations Subtotal			14 out of
PROJECT EFFECTIVENESS			
Coordinated Entry Participation	≥ 95% of entries to project from CE referrals	100 %	10 out of
Housing First and/or Low Barrier Implementation	Commits to applying Housing First model	Yes	10 out of
Project Effectiveness Subtotal			20 out of
OTHER AND LOCAL CRITERIA			
Other and Local Criteria Subtotal			0 out of
TOTAL SCORE			74 out of
Weighted Rating Score			74 out of

PROJECT FINANCIAL INFORMATION

CoC funding requested

NOTE: Edit on the LIST OF PROJECTS TO BE REVIEWED tab

\$

Amount of other public funding (federal, state, county, city)

RENEWAL/EXPANSION PROJECT RATING TOOL

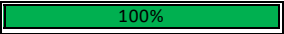
Project Name: √ PSH-Keystone (11)
Organization Name: Keystone Opportunity Center
Project Type: PSH
Project Identifier: 11

[Print Blank Template](#)

[Print Report Card](#)

Renewal/Expansion Projects
Rating Complete

Met all threshold requirements



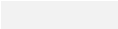
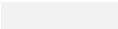
[Instructions on Awarding](#)

RATING FACTOR	PERFORMANCE GOAL	PERFORMANCE	POINTS AWARDED
Amount of private funding			
TOTAL PROJECT COST			\$
CoC Amount Awarded Last Operating Year	NOTE: Edit on the LIST OF PROJECTS TO BE REVIEWED tab		\$
CoC Amount Expended Last Operating Year	NOTE: Edit on the LIST OF PROJECTS TO BE REVIEWED tab		\$
Percent of CoC funding expended last operating year			0

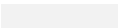


Points

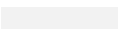
MAX POINT
VALUE



25



15

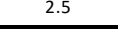


2.5

2.5

2.5

2.5



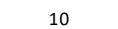
50



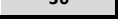
10

10

10

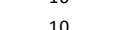


30

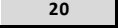


10

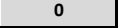
10



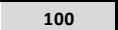
20



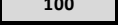
0



100



100



46,386





[Points](#)

MAX POINT VALUE
46,386
45,846
-
%

NEW PROJECTS THRESHOLD REQUIREMENTS

Project Name:	<u>✓ Rapid Rehousing for Victims of Domestic Abuse (40)</u>	Completed projects will be moved to the bottom of the list	
Organization Name:	<u>Laurel House</u>		
Project Type:	<u>RRH</u>	If you would like to change the project type, please do so in the HIC and re-copy the data to the RAW HIC DATA tab, or do so in the LIST OF PROJECTS TO BE REVIEWED.	New Projects Threshold Review Complete
Project Identifier:	<u>40</u>		<div style="background-color: green; color: white; padding: 2px; text-align: center;">100%</div>

THRESHOLD REQUIREMENTS

Stakeholders should NOT assume all requirements are fully addressed through this tool. CoC Program application requirements change periodically and annual NOFAs may provide more detailed guidance. The CoC collaborative applicant and project applicants should carefully review the annual NOFA criteria each year. ✓

HUD THRESHOLD REQUIREMENTS

1. Applicant has Active SAM registration with current information.
2. Applicant has Valid DUNS number in application.
3. Applicant has no Outstanding Delinquent Federal Debts- It is HUD policy, consistent with the purposes and intent of 31 U.S.C. 3720B and 28 U.S.C. 3201(e), that applicants with outstanding delinquent federal debt will not be eligible to receive an award of funds, unless:
 - (a) A negotiated repayment schedule is established and the repayment schedule is not delinquent, or
 - (b) Other arrangements satisfactory to HUD are made before the award of funds by HUD.
4. Applicant has no Debarments and/or Suspensions - In accordance with 2 CFR 2424, no award of federal funds may be made to debarred or suspended applicants, or those proposed to be debarred or suspended from doing business with the Federal Government.
5. Applicant has Accounting System - HUD will not award or disburse funds to applicants that do not have a financial management system that meets federal standards as described at 2 CFR 200.302. HUD may arrange for a survey of financial management systems for applicants selected for award who have not previously received federal financial assistance or where HUD Program officials have reason to question whether a financial management system meets federal standards, or for applicants considered high risk based on past performance or financial management findings.
6. Disclosed any violations of Federal criminal law - Applicants must disclose in a timely manner, in writing to HUD, all violations of Federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the Federal award. Failure to make required disclosures can result in any of the remedies described in 2 CFR §200.338, Remedies for noncompliance, including suspension or debarment. This mandatory disclosure requirement also applies to subrecipients of HUD funds who must disclose to the pass-through entity from which it receives HUD funds.
7. Demonstrated they are Eligible Project Applicants - Eligible project applicants for the CoC Program Competition are, under 24 CFR 578.15, nonprofit organizations, States, local governments, and instrumentalities of State and local governments. Public housing agencies, as such term is defined in 24 CFR 5.100, are eligible without limitation or exclusion. Neither for-profit entities nor Indian tribes are eligible to apply for grants or to be subrecipients of grant funds.
8. Submitted the required certifications as specified in the NOFA.
9. Demonstrated the project is cost-effective, including costs of construction, operations, and supportive services with such costs not deviating substantially from the norm in that locale for the type of structure or kind of activity.
10. Demonstrated they Participate in HMIS - Project applicants, except Collaborative Applicants that only receive awards for CoC planning costs and, if applicable, UFA Costs, must agree to participate in a local HMIS system. However, in accordance with Section 407 of the Act, any victim service provider that is a recipient or subrecipient must not disclose, for purposes of HMIS, any personally identifying information about any client. Victim service providers must use a comparable database that complies with the federal HMIS data and technical standards. While not prohibited from using HMIS, legal services providers may use a comparable database that complies with federal HMIS data and technical standards, if deemed necessary to protect attorney client privilege.
11. Demonstrated Project Meets Minimum Project Standards - HUD will assess all new projects for the following minimum project eligibility, capacity, timeliness, and performance standards. Please note that these are minimum threshold criteria. CoCs and project applicants should carefully review each year's NOFA to ensure they understand and have accounted for all applicable standards. To be considered as meeting project quality threshold, all new projects must meet all of the following criteria:
 - (a) Project applicants and potential subrecipients must have satisfactory capacity, drawdowns, and performance for existing grant(s) that are funded under the SHP, S+C, or CoC Program, as evidenced by timely reimbursement of subrecipients, regular drawdowns, and timely resolution of any monitoring findings;
 - (b) For expansion projects, project applicants must clearly articulate the part of the project that is being expanded. Additionally, the project applicants must clearly demonstrate that they are not replacing other funding sources; and,

NEW PROJECTS THRESHOLD REQUIREMENTS

Project Name: ✓ Rapid Rehousing for Victims of Domestic Abuse (40) *Completed projects will be moved to the bottom of the list*
 Organization Name: Laurel House
 Project Type: RRH *If you would like to change the project type, please do so in the HIC and re-copy the data to the RAW HIC DATA tab, or do so in the LIST OF PROJECTS TO BE REVIEWED.*
 Project Identifier: 40

New Projects
Threshold Review Complete

100%

THRESHOLD REQUIREMENTS

(c) Project applicants must demonstrate they will be able to meet all timeliness standards per 24 CFR 578.85. Project applicants with existing projects must demonstrate that they have met all project renewal threshold requirements of this NOFA. HUD reserves the right to deny the funding request for a new project, if the request is made by an existing recipient that HUD finds to have significant issues related to capacity, performance, unresolved audit or monitoring finding related to one or more existing grants, or does not routinely draw down funds from eLOCCS at least once per quarter. Additionally, HUD reserves the right to withdraw funds if no APR is submitted on the prior grant.

12. Demonstrated Project is Consistent with Jurisdictional Consolidated Plan(s) - All projects must be consistent with the relevant jurisdictional Consolidated Plan(s). The CoC will be required to submit a Certification of Consistency with the Consolidated Plan at the time of application submission to HUD.

CoC THRESHOLD REQUIREMENTS

For each requirement, select "Yes" if the project has provided reasonable assurances that the project will meet the requirement, has been given an exception by the CoC or will request a waiver from HUD. Otherwise select "No".

Coordinated Entry Participation

Housing First and/or Low Barrier Implementation

Documented, secured minimum match

Project has reasonable costs per permanent housing exit, as defined locally

Project is financially feasible

Applicant is active CoC participant

Application is complete and data are consistent

Data quality at or above 90%

Bed/unit utilization rate at or above 90%

Acceptable organizational audit/financial review

Documented organizational financial stability

NEW PROJECTS THRESHOLD REQUIREMENTS

Project Name:	V Rapid Rehousing for Victims of Domestic Abuse (40)	<i>Completed projects will be moved to the bottom of the list</i>	<div>New Projects Threshold Review Complete 100%</div>
Organization Name:	Laurel House		
Project Type:	RRH		
Project Identifier:	40	<i>If you would like to change the project type, please do so in the HIC and re-copy the data to the RAW HIC DATA tab, or do so in the LIST OF PROJECTS TO BE REVIEWED.</i>	

THRESHOLD REQUIREMENTS



YES/NO

Yes to all



Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes



YES/NO
Yes
Yes

[illegible]



YES/NO

NEW PROJECTS RATING TOOL			
Project Name: Rapid Rehousing for Victims of Domestic Abuse (40)		Print Blank Template	Print Report Card
Organization Name:		New Projects	
Project Type:		Rating Complete	
Project Identifier:		Met all threshold requirements	100%
		Instructions on Awarding Points	
RATING FACTOR	POINTS AWARDED	MAX POINT VALUE	
EXPERIENCE			
A. Describe the experience of the applicant and sub-recipients (if any) in working with the proposed population and in providing housing similar to that proposed in the application.		out of	15
B. Describe experience with utilizing a Housing First approach. Include 1) eligibility criteria; 2) process for accepting new clients; 3) process and criteria for exiting clients. Must demonstrate there are no preconditions to entry, allowing entry regardless of current or past substance abuse, income, criminal records (with exceptions of restrictions imposed by federal, state, or local law or ordinance), marital status, familial status, actual or perceived sexual orientation, gender identity. Must demonstrate the project has a process to address situations that may jeopardize housing or project assistance to ensure that project participation is terminated in only the most severe cases.		out of	10
C. Describe experience in effectively utilizing federal funds including HUD grants and other public funding, including satisfactory drawdowns and performance for existing grants as evidenced by timely reimbursement of subrecipients (if applicable), regular drawdowns, timely resolution of monitoring findings, and timely submission of required reporting on existing grants.		out of	5
Experience Subtotal	0	out of	30
DESIGN OF HOUSING & SUPPORTIVE SERVICES			
A. Extent to which the applicant 1. Demonstrate understanding of the needs of the clients to be served. 2. Demonstrate type, scale, and location of the housing fit the needs of the clients to be served 3. Demonstrate type and scale of the all supportive services, regardless of funding source, meet the needs of the clients to be served. 4. Demonstrate how clients will be assisted in obtaining and coordinating the provision of mainstream benefits 5. Establish performance measures for housing and income that are objective, measurable, trackable, and meet or exceed any established HUD, HEARTH or CoC benchmarks.		out of	15
B. Describe the plan to assist clients to rapidly secure and maintain permanent housing that is safe, affordable, accessible, and acceptable to their needs.		out of	5
C. Describe how clients will be assisted to increase employment and/or income and to maximize their ability to live independently.		out of	5
Design of Housing & Supportive Services Subtotal	0	out of	25
TIMELINESS			
A. Describe plan for rapid implementation of the program documenting how the project will be ready to begin housing the first program participant. Provide a detailed schedule of proposed activities for 60 days, 120 days, and 180 days after grant award.		out of	10
Timeliness Subtotal	0	out of	10
FINANCIAL			
A. Project is cost-effective - comparing projected cost per person served to CoC average within project type.		out of	5
B. Audit			
D. Budgeted costs are reasonable, allocable, and allowable		out of	20
Financial Subtotal	0	out of	25
PROJECT EFFECTIVENESS			
Coordinated Entry Participation-95% of entries to project from CE referrals		out of	5
Project Effectiveness Subtotal	0	out of	5
OTHER AND LOCAL CRITERIA			
Other and Local Criteria Subtotal	0	out of	0
TOTAL SCORE			
TOTAL SCORE	0	out of	95
Weighted Rating Score			
Weighted Rating Score		out of	100
PROJECT FINANCIAL INFORMATION			
CoC funding requested	NOTE: Edit on the LIST OF PROJECTS TO BE REVIEWED tab	\$	-
Amount of other public funding (federal, state, county, city)			
Amount of private funding			
TOTAL PROJECT COST		\$	-

ALTERNATIVE

Sort projects by:

Weighted Rating Score

You can sort the project list below

using the drop-down selection to the left.

RATING TABLE

Project ID	Grant Number	Renewal, New, Expansion, Reallocate	Project Name
34	tbd	Renewal	HMIS Dedicated Project
3	SF-424	Renewal	Supportive Housing Leasing Program for Persons with Disabilities
5	PA0133L3T041710	Renewal	Shelter Liaison
10	PA0625L3T041805	Renewal	North Penn Housing Resource Center
11	PA0799L3T041802	Renewal	PSH-Keystone
35	PA0127L3T041710	Renewal	Coordinated Homeless Outreach Center
18	PA0646L3T041705	Renewal	Horizon House S+C Act II
19	PA0575L3T041702	Renewal	Penn Foundation S+C
21	PA0549L3T041707	Renewal	Permanent Solutions - 2 (Columbus Properties)
22	PA0550L3T041707	Renewal	Project Vesta
36	PA0700L3T041703	Renewal	Pottstown HRC Rapid Rehousing 2014
37	PA0767L3T041702	Renewal	Pottstown HRC Rapid Rehousing 2015
25	PA0136L3T041710	Renewal	Disabled Individuals
27	PA0766L3T041702	Renewal	PSH2
29	PA0798L3T041701	Renewal	Permanent Supportive Housing, SA-Pottstown
32	PA0687L3T041703	Renewal	CoC Rapid Re-Housing Program for Families
38	n/a	New	Rapid Rehousing for Families of Young Children
39	n/a	Expansion	Keystone Rapid Rehousing Expand 2018
40	n/a	New	Rapid Rehousing for Victims of Domestic Abuse
41	n/a	New	Project RESET
42	n/a	New	TH-RRH for Montgomery County Young Adults
43	n/a	New	WCMC Domestic Violence Transitional Housing Project

RATING TOOL

☐ Yes to all threshold requirements

ENTER VALUES FOR ALL PROJECTS

Organization Name	Project Type	Met All HUD Threshold Requirements	Met All CoC Threshold Requirements	Weighted Rating Score (out of 100)
County of Montgomery, PA	HMIS	Yes	Yes	0
Family Services	PSH	Yes	Yes	97
Hedwig House	PSH	Yes	Yes	80
Keystone Opportunity Center	RRH	Yes	Yes	75
Keystone Opportunity Center	PSH	Yes	Yes	74
Montgomery County BH/DD	SSO	Yes	Yes	61
Montgomery County BH/DD	PSH	Yes	Yes	70
Montgomery County BH/DD	PSH	Yes	Yes	55
Montgomery County BH/DD	PSH	Yes	Yes	85
Montgomery County BH/DD	PSH	Yes	Yes	90
Pottstown Cluster of Religious Communities	RRH	Yes	Yes	70
Pottstown Cluster of Religious Communities	RRH	Yes	Yes	83
Salvation Army Norristown	PSH	Yes	Yes	82
Salvation Army Norristown	PSH	Yes	Yes	86
Salvation Army Pottstown	PSH	Yes	Yes	70
Valley Youth House	RRH	Yes	Yes	72
Carson Valley Children's Aid	RRH	Yes	Yes	68
Keystone Opportunity Center	RRH	Yes	Yes	77
Laurel House	RRH	Yes	Yes	72
HOPE, Incorporated	RRH	Yes	Yes	52
Valley Youth House	TH/RRH	Yes	Yes	88
Women's Center of Montgomery County	TH/RRH	Yes	Yes	100

If you make any edits, n
to save before moving c

By default, the thresho
score values will pull fr
individually saved proj

make sure
on.

Id and
om any
ects

RATING RESULTS

Sort projects by:

Weighted Rating Score

You can sort the project list below using the drop
down selection to the left.

Make sure to save any rating you've done before
running.

 =

RATING RESULTS

Project ID	Grant Number	Renewal, New, Expansion, Reallocate	Project Name	Organization Name	Project Type	DV/HIV	All Fam Beds	DV Fam Beds	CH Fam Beds	Vet Fam Beds	Par Youth Beds	All Ind Beds	DV Ind Beds
43	n/a	New	WCMC Domestic Violence Transiti	Women's Center of Montgomery C	TH/RRH	DV	25	25	0	0	0	0	0
3	SF-424	Renewal	Supportive Housing Leasing Program	Family Services	PSH	HIV	22	0	0	0	0	37	0
22	PA0550L3T041707	Renewal	Project Vesta	Montgomery County BH/DD	PSH	NA	0	0	0	0	0	11	0
42	n/a	New	TH-RRH for Montgomery County You	Valley Youth House	TH/RRH	NA	0	0	0	0	0	8	0
27	PA0766L3T041702	Renewal	PSH2	Salvation Army Norristown	PSH	NA	12	0	12	0	0	5	0
21	PA0549L3T041707	Renewal	Permanent Solutions - 2 (Columbus)	Montgomery County BH/DD	PSH	NA	9	0	9	0	0	42	0
37	PA0767L3T041702	Renewal	Pottstown HRC Rapid Rehousing 20	Pottstown Cluster of Religious Con	RRH	NA	103	0	0	0	0	22	0
25	PA0136L3T041710	Renewal	Disabled Individuals	Salvation Army Norristown	PSH	NA	0	0	0	0	0	6	0
5	PA0133L3T041710	Renewal	Shelter Liaison	Hedwig House	PSH	NA	11	0	0	0	0	14	0
39	n/a	Expansion	Keystone Rapid Rehousing Expand 2I	Keystone Opportunity Center	RRH	NA	59	0	0	0	0	0	0
10	PA0625L3T041805	Renewal	North Penn Housing Resource Cente	Keystone Opportunity Center	RRH	NA	44	0	0	0	0	15	0
11	PA0799L3T041802	Renewal	PSH-Keystone	Keystone Opportunity Center	PSH	NA	0	0	0	0	0	3	0
40	n/a	New	Rapid Rehousing for Victims of Domi	Laurel House	RRH	DV	70	70	0	0	0	0	0
32	PA0687L3T041703	Renewal	CoC Rapid Re-Housing Program for F	Valley Youth House	RRH	NA	28	0	0	0	28	0	0
36	PA0700L3T041703	Renewal	Pottstown HRC Rapid Rehousing 20	Pottstown Cluster of Religious Con	RRH	NA	26	0	0	0	0	6	0
18	PA0646L3T041705	Renewal	Horizon House S+C Act II	Montgomery County BH/DD	PSH	NA	0	0	0	0	0	4	0
29	PA0798L3T041701	Renewal	Permanent Supportive Housing, SA-f	Salvation Army Pottstown	PSH	NA	21	0	21	0	0	2	0
38	n/a	New	Rapid Rehousing for Families of Your	Carson Valley Children's Aid	RRH	NA	40	0	0	0	0	0	0
35	PA0127L3T041710	Renewal	Coordinated Homeless Outreach Cer	Montgomery County BH/DD	SSO	NA	0	0	0	0	0	52	0
19	PA0575L3T041702	Renewal	Penn Foundation S+C	Montgomery County BH/DD	PSH	NA	3	0	0	0	0	10	0
41	n/a	New	Project RESET	HOPE, Incorporated	RRH	NA	0	0	0	0	0	20	0
34	tbd	Renewal	HMIS Dedicated Project	County of Montgomery, PA	HMIS		0	0	0	0	0	0	0

RATING RESULTS

Sort project

Weighted R Not all requirements met or threshold scoring not started

RATING F

Project ID	Total CH Ind Beds	Vet Ind Beds	Single Youth Beds	Is 100% Dedicated + or CH Fam (Yes/No)	Is 100% Dedicated + or CH Ind (Yes/No)	Is 100% DV (Yes/No)	CoC Funding Requested	Amount of Other Public Funding (Federal, state, county, city)	Amount of private Funding	CoC Amount Expended Last Operating Year	Met All HUD Threshold Requirements	Met All CoC Threshold Requirements	Weighted Rating Score
43	0	0	0	No	No	Yes	\$170,000			\$0	Yes	Yes	100
3	3	0	0	No	No	No	\$350,015			\$329,061	Yes	Yes	97
22	11	0	0	No	Yes	No	\$78,192			\$78,192	Yes	Yes	90
42	0	0	8	No	No	No	\$137,000			\$0	Yes	Yes	88
27	5	0	0	Yes	Yes	No	\$215,816			\$131,925	Yes	Yes	86
21	42	0	0	Yes	Yes	No	\$326,497			\$326,497	Yes	Yes	85
37	0	0	0	No	No	No	\$402,886			\$402,010	Yes	Yes	83
25	6	0	0	No	Yes	No	\$102,290			\$95,372	Yes	Yes	82
5	3	0	0	No	No	No	\$189,989			\$158,918	Yes	Yes	80
39	0	0	0	No	No	No	\$187,616			\$0	Yes	Yes	77
10	0	0	0	No	No	No	\$281,636			\$281,636	Yes	Yes	75
11	3	0	0	No	Yes	No	\$46,386			\$0	Yes	Yes	74
40	0	0	0	No	No	Yes	\$243,608			\$0	Yes	Yes	72
32	0	0	0	No	No	No	\$112,028			\$112,028	Yes	Yes	72
36	0	0	0	No	No	No	\$52,432			\$52,432	Yes	Yes	70
18	4	0	0	No	Yes	No	\$26,064			\$24,456	Yes	Yes	70
29	2	0	0	Yes	Yes	No	\$184,334			\$167,833	Yes	Yes	70
38	0	0	0	No	No	No	\$181,403			\$0	Yes	Yes	68
35	0	0	0	No	No	No	\$276,509			\$276,509	Yes	Yes	61
19	0	0	0	No	No	No	\$103,028			\$93,864	Yes	Yes	55
41	0	0	0	No	No	No	\$132,000			\$0	Yes	Yes	52
34	0	0	0	No	No	No	\$139,242			\$139,242	Yes	Yes	0

GENERAL FUNDING INFORMATION

Annual Renewal Demand (\$): \$ 2,888,253

Bonus (\$): \$ 184,392

DV Bonus(\$): \$ 307,319

Tier 1 Funding Line (% of ARD): 94%

Tier 1 Funding Line (\$): \$ 2,714,958

FY2018 HUD CoC PROGRAM NOFA OPPORTUNITIES

Project Types to Consider for
Bonus/Reallocation Funding:

- ☒ New PSH for 100% Dedicated PLUS or chronically homeless individuals
☒ New PSH for 100% Dedicated PLUS or chronically homeless families
☒ New RRH for individuals
☒ New RRH for families

- ☒ New TH-RRH for Families
☒ New TH-RRH for Individuals
☐ New HMIS
☐ New SSO coordinated entry

Project Types to Consider for
DV Bonus Funding:

- ☒ New RRH for individuals
☒ New RRH for families
☒ New TH-RRH for individuals
☒ New TH-RRH for families
☐ New SSO coordinated entry

FUNDING CEILINGS AND PRIORITIES BY PROJECT TYPE AND POPULATION

For each project type/population combination, specify the maximum number of beds (renewal and new combined), maximum level of funding (ceiling), and relative priority. If beds or \$ are left blank, then projects within that category will not be capped. If the table below is blank, then projects will be ranked solely based on their rating scores. The ranking list will be generated in the following order:

- 1) HMIS and non-DV bonus-funded SSO-coordinated entry projects will be listed first in Tier 1 because they are required elements of a CoC's system. This does not mean that HUD is encouraging you to rank them first; rather you should set local policies on their relative priority and move them accordingly after the initial ranking is generated.
- 2) Bonus/new DV bonus-funded projects will be ranked just like other projects, and will be highlighted in pink/gray formatting. You should set local policies on their relative priority and move them accordingly after the initial ranking is generated.
- 3) Projects in the high priority categories, listed in order of their rating score, up to the maximum number of beds or funding level specified for each project type/population.
- 4) Projects in the medium priority categories, listed in order of their rating score, up to the maximum number of beds or funding level specified for each project type/population.
- 5) Projects in the low priority categories, listed in order of their rating score, up to the maximum number of beds or funding level specified for each project type/population.
- 6) Projects with unspecified priority, listed in order of their rating score.
- 7) Other SSO grants.

Projects that exceed the beds or \$ targets specified on the chart will be listed in the "Projects Not Selected for Funding" section of the FUNDING ANALYSIS + RANKING tab because they represent inventory above the needs of the system. The CoC NOFA Committee may want to solicit additional projects to fill project type and population targets that are not met for this CoC Program NOFA or subsequent NOFAs.

[Instructions on Completing Funding Ceilings and Priorities](#)

Total \$ Need Specified Below: \$ -

		PSH				RRH				TH				TH/RRH			
		Beds	\$	Priority		Beds	\$	Priority		Beds	\$	Priority		Beds	\$	Priority	
All Families	<input checked="" type="checkbox"/>			Medium				High				Low				Medium	
DV Families	<input type="checkbox"/>																
Chronically Homeless Families	<input type="checkbox"/>																
Veteran Families	<input type="checkbox"/>																
Parenting Youth	<input type="checkbox"/>																
All Individuals	<input checked="" type="checkbox"/>																
DV Individuals	<input type="checkbox"/>																
Chronically Homeless Individuals	<input type="checkbox"/>																
Veteran Individuals	<input type="checkbox"/>																
Single Youth	<input checked="" type="checkbox"/>																

FUNDING ANALYSIS + RANKING

Bonus Funding	\$184,392
Allocated	\$187,616
% of Ceiling	102%
Remaining	-\$3,224

DV Bonus Funding	\$307,319
Allocated	\$170,000
% of Ceiling	55%
Remaining	\$137,319

Tier 1 Funding	\$2,714,958
Allocated	\$2,887,344
% of Ceiling	106%
Remaining	-\$172,386
DV Bonus component	\$0

Tier 2 (Rest of ARD + Bonus)	
Allocated	
% of Ceiling	
Remaining	
DV Bonus component	

TIER 1

TIER 2

PROJECTS

Ranking	Priority Level	Weighted Rating Score	Renewal, New, Expansion, Reallocate	Grant Number	Project Type	Organization Name	Project Name	CoC Funding Requested	CoC Amount Expended Last Operating Year
1		NOT RATED	Renewal	tbd	HMIS	County of Montgomery, PA	HMIS Dedicated Proje	\$ 139,242	\$ 139,242
2	High	83	Renewal	PA0767L3T041702	RRH	Pottstown Cluster of Religic	Pottstown HRC Rapid	\$ 402,886	\$ 402,010
3	High	75	Renewal	PA0625L3T041805	RRH	Keystone Opportunity Cent	North Penn Housing R	\$ 281,636	\$ 281,636
4	High	72	Renewal	PA0687L3T041703	RRH	Valley Youth House	CoC Rapid Re-Housing	\$ 112,028	\$ 112,028
5	High	70	Renewal	PA0700L3T041703	RRH	Pottstown Cluster of Religic	Pottstown HRC Rapid	\$ 52,432	\$ 52,432
6	Medium	97	Renewal	SF-424	PSH	Family Services	Supportive Housing L	\$ 350,015	\$ 329,061
7	Medium	90	Renewal	PA0550L3T041707	PSH	Montgomery County BH/DE	Project Vesta	\$ 78,192	\$ 78,192
8	Medium	86	Renewal	PA0766L3T041702	PSH	Salvation Army Norristown	PSH2	\$ 215,816	\$ 131,925
9	Medium	85	Renewal	PA0549L3T041707	PSH	Montgomery County BH/DE	Permanent Solutions	\$ 326,497	\$ 326,497
10	Medium	82	Renewal	PA0136L3T041710	PSH	Salvation Army Norristown	Disabled Individuals	\$ 102,290	\$ 95,372
11	Medium	80	Renewal	PA0133L3T041710	PSH	Hedwig House	Shelter Liaison	\$ 189,989	\$ 158,918
12	Medium	74	Renewal	PA0799L3T041802	PSH	Keystone Opportunity Cent	PSH-Keystone	\$ 46,386	\$ -
13	Medium	70	Renewal	PA0798L3T041701	PSH	Salvation Army Pottstown	Permanent Supportiv	\$ 184,334	\$ 167,833
14	Medium	70	Renewal	PA0646L3T041705	PSH	Montgomery County BH/DE	Horizon House S+C Ac	\$ 26,064	\$ 24,456
15	Medium	55	Renewal	PA0575L3T041702	PSH	Montgomery County BH/DE	Penn Foundation S+C	\$ 103,028	\$ 93,864
16	Unspecified	61	Renewal	PA0127L3T041710	SSO	Montgomery County BH/DE	Coordinated Homeles	\$ 276,509	\$ 276,509
16	High	77	Expansion	n/a	RRH	Keystone Opportunity Cent	Keystone Rapid Rehou	\$ 187,616	\$ -
17	Medium	100	New	n/a	TH/RRH	Women's Center of Montgo	WCMC Domestic Viol	\$ 170,000	\$ -
18	Medium	88	New	n/a	TH/RRH	Valley Youth House	TH-RRH for Montgom	\$ 137,000	\$ -
Exceeds ARD	High	72	New	n/a	RRH	Laurel House	Rapid Rehousing for V	\$ 243,608	\$ -
Exceeds ARD	High	68	New	n/a	RRH	Carson Valley Children's Aid	Rapid Rehousing for F	\$ 181,403	\$ -
Exceeds ARD	High	52	New	n/a	RRH	HOPE, Incorporated	Project RESET	\$ 132,000	\$ -

Projects Not Selected For Funding

Ranking	Priority Level	Weighted Rating Score	Renewal, New, Expansion, Reallocate	Grant Number	Project Type	Organization Name	Project Name	CoC Funding Requested	CoC Amount Expended Last Operating Year
---------	----------------	-----------------------	-------------------------------------	--------------	--------------	-------------------	--------------	-----------------------	---

FUNDING ANALYSIS + RANKING

Bonus + DV Bonus)	\$665,006	Projects Exceeding ARD + Bonus + DV Bonus	
	\$667,002	Amount	\$557,011
	100%		
	-\$1,996		
	\$170,000		

MANUALLY EDIT!

CoC Funding Recommendation (manual entry)	All Fam Beds	DV Fam Beds	CH Fam Beds	Vet Fam Beds	Par Youth Beds	All Ind Beds	DV Ind Beds	Total CH Ind Beds	Vet Ind Beds	Single Youth Beds	Is 100% Dedicated + or CH Fam (Yes/No)	Is 100% Dedicated + or CH Ind (Yes/No)	Is 100% DV (Yes/No)	Met All HUD Threshold Requirements	Met All CoC Threshold Requirements
\$ 139,242	0	0	0	0	0	0	0	0	0	0	No	No	No	Yes	Yes
\$ 402,886	103	0	0	0	0	22	0	0	0	0	No	No	No	Yes	Yes
\$ 281,636	44	0	0	0	0	15	0	0	0	0	No	No	No	Yes	Yes
\$ 112,028	28	0	0	0	28	0	0	0	0	0	No	No	No	Yes	Yes
\$ 52,432	26	0	0	0	0	6	0	0	0	0	No	No	No	Yes	Yes
\$ 350,015	22	0	0	0	0	37	0	3	0	0	No	No	No	Yes	Yes
\$ 78,192	0	0	0	0	0	11	0	11	0	0	No	Yes	No	Yes	Yes
\$ 215,816	12	0	12	0	0	5	0	5	0	0	Yes	Yes	No	Yes	Yes
\$ 326,497	9	0	9	0	0	42	0	42	0	0	Yes	Yes	No	Yes	Yes
\$ 102,290	0	0	0	0	0	6	0	6	0	0	No	Yes	No	Yes	Yes
\$ 189,989	11	0	0	0	0	14	0	3	0	0	No	No	No	Yes	Yes
\$ 46,386	0	0	0	0	0	3	0	3	0	0	No	Yes	No	Yes	Yes
\$ 184,334	21	0	21	0	0	2	0	2	0	0	Yes	Yes	No	Yes	Yes
\$ 26,064	0	0	0	0	0	4	0	4	0	0	No	Yes	No	Yes	Yes
\$ 103,028	3	0	0	0	0	10	0	0	0	0	No	No	No	Yes	Yes
\$ 276,509	0	0	0	0	0	52	0	0	0	0	No	No	No	Yes	Yes
\$ 187,616	59	0	0	0	0	0	0	0	0	0	No	No	No	Yes	Yes
\$ 170,000	25	25	0	0	0	0	0	0	0	0	No	No	Yes	Yes	Yes
\$ 137,000	0	0	0	0	0	8	0	0	0	8	No	No	No	Yes	Yes
\$ 243,608	70	70	0	0	0	0	0	0	0	0	No	No	Yes	Yes	Yes
\$ 181,403	40	0	0	0	0	0	0	0	0	0	No	No	No	Yes	Yes
\$ 132,000	0	0	0	0	0	20	0	0	0	0	No	No	No	Yes	Yes

MANUALLY EDIT!

CoC Funding Recommendation (manual entry)	All Fam Beds	DV Fam Beds	CH Fam Beds	Vet Fam Beds	Par Youth Beds	All Ind Beds	DV Ind Beds	Total CH Ind Beds	Vet Ind Beds	Single Youth Beds	Is 100% Dedicated + or CH Fam (Yes/No)	Is 100% Dedicated + or CH Ind (Yes/No)	Is 100% DV (Yes/No)	Met All HUD Threshold Requirements	Met All CoC Threshold Requirements
---	--------------	-------------	-------------	--------------	----------------	--------------	-------------	-------------------	--------------	-------------------	--	--	---------------------	------------------------------------	------------------------------------

Project ID
34
37
10
32
36
3
22
27
21
25
5
11
29
18
19
35
39
43
42
40
38
41

Project ID

Dawson, Blair

From: Your Way Home Montgomery County
<bdawson=montcopa.org@mail120.suw151.rsgsv.net> on behalf of Your Way Home Montgomery County <bdawson@montcopa.org>
Sent: Friday, September 14, 2018 5:51 PM
To: Dawson, Blair
Subject: PA-504 FY 18 CoC Consolidated Application Open For Public Review

[View this email in your browser](#)



Facebook



Twitter



Website



Email



Website



NEWS

PA-504 FY 2018 CoC Program Competition: Documents Online for Public Review

The Montgomery County Office of Housing and Community Development is the Collaborative Applicant responsible for facilitating Your Way Home

Montgomery County's PA-504 Continuum of Care (CoC) Program Competition issued by the federal department of Housing and Urban Development (HUD), including the review, rating and ranking of new and renewal projects that provide housing and services for residents experiencing or at imminent risk of homelessness using these federal dollars.

The CoC makes all program competition documents available to the public for review and input. The final version of the completed CoC Consolidated Application for FY 2018 will be submitted to HUD on September 18, 2018 at 3:00 p.m. and made available to the public that same day. If you are interested in viewing any documents related to the competition, please follow the links below or visit the CoC webpage on the Your Way Home PA-504 website at <https://yourwayhome.org/continuum-of-care/>. Check back frequently for updates. Comments regarding the competition may be directed to Blair Dawson, Your Way Home Community Relations Manager at bdawson@montcopa.org.

PA-504 FY 2018 documents available online for public review include:

[PA-504 FY 2018 CoC Program Competition Consolidated Application and Priority Listing](#) (posted online for public review on September 14, 2018 following CoC Governance Team approval)

[PA-504 FY 2018 CoC Program Competition Application Priority Listing](#) (Posted August 24, 2018)

[PA-504 FY 2018 CoC Program Competition New and Renewal Project Applications](#) (link to website posting- September 14, 2018).

Please note, that check boxes for certain answers on the

application do not appear, including:

1E-3:

CoC or other Website, Email and Social Media for both columns

3B-2.3:

CoC conducts mandatory training for all CoC and ESG funded service providers on these topics and CoC has worked with ESG recipient(s) to adopt uniform anti-discrimination policies for all subrecipients.

3B-5b:

The CoC has identified steps it will take to help the CoC board and decisionmaking bodies better reflect the population served in the CoC.

The CoC is expanding outreach in geographic areas with higher concentrations of underrepresented groups.

The CoC has communication, such as flyers, websites, or other materials, inclusive of underrepresented groups

The CoC is training staff working in the homeless services sector to better understand racism and the intersection of racism and homelessness.

The CoC is establishing professional development opportunities to identify and invest in emerging leaders of different races and ethnicities in the homelessness sector.

The CoC has staff, committees or other resources

charged with analyzing and addressing racial disparities related to homelessness.

The CoC is educating organizations, stakeholders, boards of directors for local and national non-profit organizations working on homelessness on the topic of creating greater racial and ethnic diversity.

The CoC reviewed coordinated entry processes to understand their impact on people of different races and ethnicities experiencing homelessness.

The CoC is collecting data to better understand the pattern of program use for people of different races and ethnicities in its homeless services system.

The CoC is conducting additional research to understand the scope and needs of different races or ethnicities experiencing homelessness.

To learn more or download the HUD FY 2018 CoC Program Competition Notice of Funding Availability (NOFA): <https://www.hudexchange.info/resource/5719/fy-2018-coc-program-nofa/>

ABOUT US

Your Way Home Montgomery County is a transformational partnership between

government, philanthropy, nonprofits and community partners to end homelessness and housing instability for hardworking families and vulnerable residents throughout Montgomery County, which will make our community stronger for everyone.

If you aren't familiar with us, you can learn more at our website (yourwayhome.org).

OUR COMMUNITY AGENDA

To improve the housing stability, economic security and health of all Montgomery County residents.

OUR SHARED VISION

By creating more coordination, collaboration, communication and accountability among government, philanthropic, nonprofit and community partners, we will achieve better health, housing and financial outcomes for the most vulnerable members of our community.

OUR BOLD GOAL

Our bold goal is to reduce homelessness in Montgomery County by over 50% in the next five years while exiting people from homelessness to permanent housing more rapidly.



Facebook



Twitter



Website



Email

Copyright © 2018 Your Way Home Montgomery County, All rights reserved.

You are receiving this email because you are interested in ending homelessness in Montgomery County.

Our mailing address is:

Your Way Home Montgomery County
1430 DeKalb Street, 5th Floor
PO Box 311
Norristown, Pa 19401

[Add us to your address book](#)

Continuum of Care — Your Website

https://yourwayhome.org/continuum-of-care/

App YourWayHome.org Squarespace MailChimp Dashboard Welcome to Squarespace Eventbrite - Discover Planner Twitter / Notifications Carew Google MountCo Clarity

COC FY2018 GRANT APPLICATION MATERIALS:

Documents for Review:

- PA-504 CoC FY 2018 CoC Consolidated Application with Attachments
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Priority Listing
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Program Competition New and Renewal Project Applications
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Program Competition Ranking
Posted 8/24/18
- PA-504 CoC FY 2018 CoC Program Competition Rating Tool

Governance Charter:

- PA-504 Montgomery County, Pennsylvania: Continuum of Care Governance Charter
Posted 8/24/18

FY 2018 Policies, Priorities, and Applications:

- PA-504 FY 2018 CoC Program Competition: New Project Application Instructions
Posted 7/13/18
- CoC New Project Application Detailed Instructions: Fiscal Year 2018 CoC Program Competition
Posted 7/13/18
- FY 2018 New Project Application: Navigational Guide
Posted 7/13/18
- PA-504 FY 2018 CoC Program Competition: Renewal Project Application Instructions
Posted 7/13/18
- PA-504 FY 2018 CoC Program Competition: Renewal Application Summary
Posted 7/13/18

9:01 AM 9/13/2018

Twitter, Inc. (US) | https://twitter.com/YWHMontCo

yourwayhome.org |

Squarespace

MailChimp Dashboard

Welcome to Survey1

Eventbrite - Devices

Flarex

Twitter / Notifications

Camera

Google

MontCo

Clarify

Home

Moments

Notifications

Messages

Twitter

Search Twitter

Tweet

Your Way Home

@YWHMontCo

Tweets

Following

Followers

Likes

Lists

Moments

1,088

438

441

298

0

0

Edit profile

Your Way Home

@YWHMontCo

Your Way Home (YWH) is a public-private partnership dedicated to improving the housing stability, economic security and health of Montgomery County residents.

Montgomery County, PA

yourwayhome.org

Joined May 2014

226 Photos and videos

Tweets

Tweets & replies

Media

Your Way Home @YWHMontCo · 4m

FY2018 PA-504 CoC Consolidated HUD Application up for public review

Continuum of Care

yourwayhome.org

Your Way Home @YWHMontCo · Sep 12

Thank You @MontCoCommerce for co-sponsoring yesterday's Equitable Access to Economic Opportunities Forum. The panel was rich with information and ideas to improve access to equitable employment.

MontcoCommerce @MontCoCommerce

#MontcoForward is about making @MontcoPA the place to live, work, learn, & invest for everyone; thank you @YWHMontCo for the work you do and for including us in today's Equitable Access Forum!

Your Way Home @YWHMontCo · Sep 11

Today's panelists taking questions and opening up the forum! Craig Cuthbert of @PACareerLink, Kate Houston of @Eamafdn, Suzan Neiger Gould of @marssonmain, and Jason Zerbe of @FirstStepStaffing

Your Tweet activity

Your Tweets earned 1,854 impressions over the last week

1,854

1,000

500

0

Sep 8

Sep 14

View your top Tweets

Who to follow

Followed by Emma Herp and others

Michael Shore @mshoremore

Follow

Followed by Ken Lawrence Jr. and others

Evan Brandt @PottstownNJ...

Follow

Followed by Jason Alexander and others

CynthiaH @Cynthianagen...

Follow

Find people you know

Trends for you

Change

2:11 PM

9/14/2018

https://www.facebook.com/yourwayhome montgomery county/

YourWayHome.org | Twitter | MailChimp | SurveyMonkey | Eventbrite | Discord | Planner | Twitter / Notification | Canvas | Google | MontCo | Clarity

Your Way Home Montgomery County

Page | Inbox | Notifications | Insights | Publishing Tools | Promotions | Settings | Help


Your Way Home Montgomery County
@yourwayhome montgomery county

Home | About | Photos | Events | Videos | Posts | Services | Shop | Groups | Notes | Offers | Jobs | Community | Info and Ads | Promote | Manage Promotions

Like | Following | Share

Your Way Home Montgomery County
Published by Blair Kindick Dawson · 2 min

FY 2018 PA-504 CoC Consolidated HUD Application up for public review:
<https://twitter.com/YWHMontCo/status/1043683905566175239>


YOUR WAY HOME
MONTGOMERY COUNTY

TWITTER.COM
Your Way Home on Twitter
FY2018 PA-504 CoC Consolidated HUD Application up for public...

Boost Post

Like | Comment | Share

Your Way Home Montgomery County shared a post.
Published by Blair Kindick Dawson · July 12

Your Way Home is continuing the Equity conversation (started at the

Contact Us


About | See Ad

Send Message


<http://www.yourwayh...> | Promote Website


Community | Suggest Edit


Team Members

 Blair Kindick Dawson

Pages Liked by This Page

 Homeless and Housing Coalition...

 Family Mentor of Montgomery C...

 Haven for Hope

English (US) | Español | Português (Brasil) | Français (France) | Deutsch

Privacy | Terms | Advertising | Ad Choices | Cookies | More

Facebook © 2018

Chat (0/0)

2:14 PM 9/14/2018

Dawson, Blair

From: Your Way Home Montgomery County
<bdawson=montcopa.org@mail218.atl171.mcdlv.net> on behalf of Your Way Home Montgomery County <bdawson@montcopa.org>
Sent: Friday, July 13, 2018 3:27 PM
To: Dawson, Blair
Subject: PA-504 FY 2018 CoC Program Competition: New Project Application

[View this email in your browser](#)



Facebook



Twitter



Website



Email



Website



NEWS

PA-504 FY 2018 CoC Program Competition: New Project Application

The United States Department of Housing and Urban Development's (HUD) Continuum of Care (CoC)

Program is designed to promote communitywide commitment to the goal of ending homelessness; provide funding for efforts by nonprofit providers, and State and local governments to quickly rehouse homeless individuals and families while minimizing the trauma and dislocation caused to homeless individuals, families, and communities by homelessness; promote access to and effect utilization of mainstream programs by homeless individuals and families; and optimize self-sufficiency among individuals and families experiencing homelessness.

Your Way Home Montgomery County PA-504 CoC anticipates having **\$184,392** available for new Rapid Re-Housing projects. Populations to be served in order of priority include:

- Rapid Re-Housing for families and/or single adults.
- Rapid Re-Housing for youth aged 18 – 24.
- Joint TH and RRH component project for Transitional Age Youth aged 18 – 24.

Additionally, Your Way Home Montgomery County PA-504 CoC anticipates having up to **\$307,319** available for project(s) that are dedicated to survivors of domestic violence, dating violence, sexual assault, or stalking. Project types may include:

- RRH - Rapid Rehousing

To access the new project application, please click [here](#).

For more CoC Program Competition information and instructions, please visit the Continuum of Care page on the Your Way Home website by clicking [here](#).

If you have any issues downloading or accessing documents, please contact:

Blair Dawson
Community Relations Manager
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
Email: bdawson@montcopa.org

ABOUT US

Your Way Home Montgomery County is a transformational partnership between government, philanthropy, nonprofits and community partners to end homelessness and housing instability for hardworking families and vulnerable residents throughout Montgomery County, which will make our community stronger for everyone.

If you aren't familiar with us, you can learn more at our website (yourwayhome.org).

OUR COMM AGENDA

To improve the housing stability, economic security and health of all Montgomery County

OUR SHAR VISION

By creating more coordination, collaboration, communication and accountability

OUR BOL GOAL

Our bold goal is to reduce homelessness in Montgomery County by over 50% in the

residents.

among government, philanthropic, nonprofit and community partners, we will achieve better health, housing and financial outcomes for the most vulnerable members of our community.

next five years while exiting people from homelessness to permanent housing more rapidly.



Facebook



Twitter



Website



Email

Copyright © *|2018|* *|YWH|*, All rights reserved.

[unsubscribe from this list](#) [update subscription preferences](#)

This email was sent to bdawson@montcopa.org

[why did I get this?](#) [unsubscribe from this list](#) [update subscription preferences](#)

Your Way Home Montgomery County · 1430 DeKalb Street, 5th Floor · PO Box 311 · Norristown, Pa 19401 · USA



PA-504 2018 Continuum of Care (CoC) Program Competition: New Project Application

Updated July 13, 2018

Collaborative Applicant: Program Office of Housing and Community Development,
Montgomery County Department of Health and Human Services

Contacts:

Carolyn K. Mayinja
PA-504 CoC Co-Chair
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
PO Box 311
Norristown, PA 19404-0311
Tel: (610) 278-3540
Email: cmayinja@montcopa.org

Jason D. Alexander
Your Way Home Senior Advisor and PA-504 CoC Planning Consultant
Capacity for Change, LLC
Tel: 610-793-5063
Email: jason@capacityforchange.com

About Your Way Home Montgomery County PA-504 CoC:

<https://yourwayhome.org/partners/>

To learn more or download the 2018 HUD CoC Grant Competition Notice of Funding Availability: <https://www.hudexchange.info/programs/e-snaps/fy-2018-coc-program-nofa-coc-program-competition/#nofa-and-notices>

New Project Detailed Instructions and Instructional Guide:

<https://www.hudexchange.info/resource/2909/coc-project-application-instructions-for-new-projects/>

2018 CoC Program Competition: Your Way Home PA-504 New Project Priorities

Your Way Home Montgomery County PA-504 CoC anticipates having \$184,392 available for new Rapid Re-Housing projects. Populations to be served in order of priority include:

- Rapid Re-Housing for families with young children aged 0 – 5.



- Rapid Re-Housing for youth aged 18 – 24.
- Rapid Re-Housing for other families and/or single adults.
- Joint TH and RRH component project for Transitional Age Youth aged 18 – 24.

RRH and Joint TH and RRH component projects must follow a Housing First approach and the maximum grant term for a DV bonus project is 1-year, regardless of component type.

In addition, Your Way Home Montgomery County PA-504 CoC anticipates having up to \$307,319 available for project(s) that are dedicated to survivors of domestic violence, dating violence, sexual assault, or stalking that meet the eligibility criteria established in paragraph (4) of the definition of homeless at 24 CFR 578.3. Project types may include:

- RRH - Rapid Rehousing

What's New for CoC Program New Project Applications in FY 2018

1. Funding Limitations: For FY 2018, new projects are eligible through "Reallocation," funds "Bonus" funds, a combination of "Reallocation + Bonus," funds or "DV Bonus" funds. Within each CoC, the total available amount for new (standard) "Bonus" projects are limited to 6 percent of the CoC's Final Pro-Rata Need (FPRN). In addition, "DV Bonus" funds are limited to 10 percent of the CoC's Preliminary Pro Rata Need (PPRN), or a minimum of \$50,000, whichever is greater, or a maximum of \$5 million, whichever is less of the CoC's Final Pro-Rata Need (FPRN).
2. Domestic Violence (DV) Bonus. In the FY 2018 CoC Program Competition, up to \$50 million is available for project(s) that are dedicated to survivors of domestic violence, dating violence, sexual assault, or stalking that meet the eligibility criteria established in paragraph (4) of the definition of homeless at 24 CFR 578.3. Refer to Section III.C.3.h of the FY 2018 CoC Program Competition NOFA for more information. CoCs may only apply for up to 10 percent of their Preliminary Pro Rata Need (PPRN), or a minimum of \$50,000, whichever is greater, or a maximum of \$5 million, whichever is less, to create up to three DV Bonus projects—up to one of each of the following component types:
 - a. PH-RRH - Rapid Rehousing project;
 - b. Joint TH and PH-RRH component project;
 - c. SSO-CE project to implement policies, procedures, and practices that equip CoC's coordinated entry to better meet the needs of survivors of domestic violence, date violence, sexual assault, or stalking.



PH-RRH and Joint TH and PH-RRH component projects must follow a Housing First approach and the maximum grant term for a DV bonus project is 1-year, regardless of component type.

HUD will select projects for the DV Bonus based on the CoC score, the project applicant's ability to demonstrate the need for the project, and the project applicant's capacity to implement a DV Bonus project to serve survivors of domestic violence, dating violence, sexual assault, or stalking, and their ability to house survivors and meet safety outcomes. Project applicants should carefully fill out the project application and ensure that this information is clearly conveyed. In addition, project applicants should select the "Domestic Violence" checkbox on screen "3B. Project Description," question #4 and select "DV Bonus" from the dropdown menu on screen "6A. Funding Request," question #2. Projects that are not selected as a DV Bonus projects will remain in the position ranked by the CoC and HUD select them for funding with available CoC Program funds.

3. Combination of Reallocated funds and Bonus funds in the same project. CoCs and project applicants may use both Reallocated and (standard) Bonus funds in a single new project. DV Bonus funds are not eligible to be combined with Reallocated or (standard) Bonus funds.
4. Transition Grant. The FY 2018 Appropriations Act permits CoCs to use reallocation to transition eligible renewal project(s) from their original component(s) to another eligible component for new project applications in the FY 2018 CoC Program Competition. To take advantage of this component transition, the CoC must fully reallocate the renewal project's funds and then the same project applicant must submit a new project application in e-snaps. Eligible components for new projects in the transition process are: PH-PSH, PH-RRH, Joint TH and PH-RRH, SSO-CE, and HMIS. Refer to Section II.B.2. of the FY 2018 CoC Program Competition NOFA for the criteria that applicants must follow for transition grants. The following requirements must be met to transition existing eligible renewal grant(s) through a new project application:
 - a. the recipient of the renewal project(s) being eliminated through reallocation must be the same organization as the project applicant for the new project;
 - b. the maximum grant term is 1 year for the transition grant regardless of component type.
 - c. no more than 50 percent of the new grant awarded may be used within the 1-year term for costs of eligible activities of the originally funded renewal component(s);



- d. transition grants are eligible for renewal after the 1-year term under the new component in subsequent fiscal years only for eligible activities of the new component; and
- e. the renewal project applicant that intends to use this transition grant process must have the consent of its Continuum of Care and meet the reallocation standards outlined in Section III.C.3.q. of the FY 2018 CoC Program Competition NOFA.

Project applicants that intend to use the transition grant process must also attach a copy of the most recently awarded project application(s). In most cases this will be a FY 2017 project application.

Transition grants are prohibited from the following FY 2018 CoC Program activities:

- a. using the CoC Program expansion process (see below for more information); and
- b. using the grant consolidation process (see above for more information).



PA-504 2018 CoC Program Competition: New Project Application Form

Instructions: Please complete this form electronically and return in MS Word format as an email attachment to Carolyn Mayinja at cmayinja@montcopa.org and Jason Alexander at jason@capacityforchange.com on or before Wednesday, August 15th 2018 at 3:00 PM EST for consideration by the Your Way Home CoC Governance Team.

Eligible project applicants for the CoC Program Competition are nonprofit organizations, local governments, and public housing agencies. Applications shall only be considered from project applicants in good standing with HUD, which means that the applicant does not have any open monitoring or audit findings, history of slow expenditure of grant funds- outstanding obligation to HUD that is in arrears or for which a payment schedule has not been agreed upon, or history of serving ineligible program participants, expending funds on ineligible costs, or failing to expend funds within statutorily established timeframes.

By submitting a new project application, applicants agree to:

1. Comply fully with Your Way Home Montgomery County's Operations Manual, including policies, procedures and forms. The Manual is available for download at <https://yourwayhome.org/resources-1/> or available upon request by email.
2. Accept all referrals from Your Way Home's Coordinated Entry System.
3. Participate fully in Your Way Home PA-504's Clarity Homeless Management Information System (HMIS).
4. Participate in Montgomery County's Annual Point-In-Time Count.
5. Be prepared to house the first household eligible for the project within six months of receiving the CoC grant award.
6. Meet Match requirements as noted by HUD in the CoC 2018 Program Competition NOFA.
7. Enroll vulnerable households regardless of income, current or past substance abuse, and criminal record—with the exception of restrictions imposed by federal, state, or local law or ordinance—as best as possible.

Q1. Please state the organization's legal name and provide contact information for the person authorized to submit the project application on it's behalf.

Q2. Does the organization agree to comply with the project applicant requirements listed above?



Q3. What is the proposed name of the new project?

Q4. What is the proposed new project type (i.e., RRH, Joint TH and RRH, etc.)?

Q5. Is this project a request to expand an existing project that is currently CoC Program-funded?

Q6. What population(s) will the project serve?

Q7. Will the project be located in Montgomery County, PA?

Q8. Please briefly describe the project, including an estimated number of households to be served per year, staffing, and organizational expertise/experience in delivering housing interventions with a Housing First approach.

Q9. How much funding is requested from the FY 2018 PA-504 CoC Grant? Please identify major budget line item expenses related to this funding amount.

Q10. Is the organization willing and able to provide the match funds should the grant be awarded?

From: Mayinja, Carolyn cmayinja@montcopa.org
Subject: PA 504 CoC Renewal Project Application Instructions
Date: July 13, 2018 at 2:32 PM

CM

To: Arlene Daily ADaily@keystoneopp.org, Barbara Wilhelmy (Cluster) bwilhelmy@pottstowncluster.org, Bruce Livingston (SA) blivingston@use.salvationarmy.org, Genny O'Donnell (CHOC) Genny@RHD.org, Jason@capacityforchange.com, Joelle Pitts jpitts@valleyyouthhouse.org, Karen Bitting (Hedwig House) karenbitting@hedwighouse.org, Kathi Krablin (VYH) kkrablin@valleyyouthhouse.org, Kelly Brown kbrown@fsmontco.org, Ken Smith (Keystone) ksmith@keystoneopp.org, Mayinja, Carolyn cmayinja@montcopa.org, Owen Camuso owen.camuso@RHD.ORG, Pirog, Timothy TPirog@montcopa.org, Ruth Nieboer Ruth_Nieboer@use.salvationarmy.org, Susan Hays (Hedwig House) susanhays@hedwighouse.org, Viviann Schorle vschorle@fsmontco.org, Wendy Egolf Wendy.Egolf@use.salvationarmy.org
Cc: Jason@capacityforchange.com, Hertz, Emma EHertz@montcopa.org, kdunphy@uwgpsnj.org, Dawson, Blair bdawson@montcopa.org, Barchuk, Gregory GBarchuk@montcopa.org

Dear CoC Grantees;

HUD has announced the Notice of Funding Availability (NOFA) for the 2018 Continuum of Care Competition. The Application, including Renewal Applications and any new projects are due to HUD on September 18, 2018. Kindly review the attached documents specifically for completing and submitting your Renewal Applications:

1. 2018 CoC Renewal projects Instructions – **due date: August 15, 2018**
2. 2018 Renewal projects Survey – **due date: August 15, 2018. Questions on completing the Survey should be directed to Greg Barchuk, YWH Data Manager.**
3. 2018 CoC Competition Timeline

There is also an opportunity for us again this year to apply for New CoC projects under Rapid Rehousing, Joint TH and RRH projects for Transition Age Youth and/or Domestic Violence Rapid Rehousing Bonus Projects. The instructions for New CoC Project Applications will be posted on the YWH website and through the YWH Distribution Email List later today. Please watch out for this information, if you are interested in applying for a new CoC Bonus project.

Please call or email any questions.

Thank you

Carolyn K. Mayinja
PA-504 CoC Co-Chair
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
PO Box 311
Norristown, PA 19404-0311
Tel: (610) 278-3540
Email: cmayinja@montcopa.org
www.montcopa.org



PA-504 HUD
CoC F...ns.pdf



CoC Renewals
Applica...ey.xlsx



PA-504 FY 2017 CoC Program Competition: Renewal Project Application Instructions

Updated August 6, 2018

Collaborative Applicant: Office of Housing and Community Development,
Montgomery County Department of Health and Human Services

Contacts:

Carolyn K. Mayinja
PA-504 CoC Co-Chair
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
Tel: (610) 278-3540 Email: cmayinja@montcopa.org

Jason D. Alexander
Your Way Home Senior Advisor and PA-504 CoC Planning Consultant
Capacity for Change, LLC
Tel: 610-793-5063 Email: jason@capacityforchange.com

About Your Way Home Montgomery County PA-504 CoC:
<http://yourwayhome.org/montgomery-county-homeless-continuum-care>

About Your Way Home Montgomery County PA-504 CoC:
<https://yourwayhome.org/partners/>

To learn more or download the 2018 HUD CoC Grant Competition Notice of Funding Availability: <https://www.hudexchange.info/programs/e-snaps/fy-2018-coc-program-nofa-coc-program-competition/#nofa-and-notices>

Renewal Project Detailed Instructions and Navigational Guide:
<https://www.hudexchange.info/resource/2910/coc-project-application-instructions-for-renewal-projects/>

Your Way Home PA-504 2018 CoC Renewal Project Application Instructions

The PA-504 Montgomery County Continuum of Care (CoC) is requiring any agency interested in renewing a project for funding in the FY 2018 HUD Continuum of Care Program Competition to complete the Renewal Project Application in HUD's e-snaps application system. Instructions and guidance for completing the application are available through the HUD website at the links listed above. Additional questions may be addressed to Carolyn Mayinja and Jason Alexander.

In addition, the CoC requires any agency interested in renewing a project for funding in the FY 2018 HUD Continuum of Care Program Competition to submit the following



documents to Carolyn Mayinja at cmayinja@montcopa.org and Jason Alexander at jason@capacityforchange.com on or before Wednesday, August 15th, 2018 at 3:00 PM.

1. A copy of their current CoC grant agreement, including the approved budget.
2. A PDF version of their FY 2018 CoC Program Renewal Project Application, including attachments, which can be downloaded in e-snaps upon submission.
3. A completed version of the PA-504 FY 2018 CoC Program Competition Renewal Project Survey electronically and return in MS Excel format based on an APR report for October 1, 2016 – September 30, 2017.
4. A PDF version of the project's APR report for October 1, 2016 – September 30, 2017.

Renewal project applicants must also agree to:

1. Comply fully with Your Way Home Montgomery County's Operations Manual, including policies, procedures and forms. The Manual is available for download at <https://yourwayhome.org/resources-1/> or available upon request by email.
2. Accept all referrals from Your Way Home's Coordinated Entry System.
3. Participate fully in Your Way Home PA-504's Clarity Homeless Management Information System (HMIS).
4. Participate in Montgomery County's Annual Point-In-Time Count.
5. Fully utilize a Housing First approach to program and service delivery.

Renewal project applicants will be notified by email of their project(s) rating and ranking on or before **August 24, 2018**.

The Your Way Home PA-504 project rating and ranking tool was distributed with these instructions and is available on the CoC webpage or upon request by email.



What's New for CoC Program Renewal Project Applications in FY 2018

1. Grant Consolidation. Renewal project applicants can consolidate renewal project applications in the FY 2018 CoC Program Competition. The FY 2018 CoC Program NOFA provides the requirements project applicants must follow in Sections II.B.4. and V.B.3.a.(7). For project applicants that choose to use the project application to consolidate projects, the following apply:
 - the projects must be the same project type (e.g., PH-PSH = PH-PSH etc.);
 - project applicants must submit separate renewal project applications for each of the projects (renewal grants) that are proposed to be consolidated; and
 - project applicants must submit a separate fully consolidated project application with the combined budgets and project information of all proposed consolidations.
2. Transition Grant. The FY 2018 Appropriations Act permits CoCs to use reallocation to transition eligible renewal projects from their original component(s) to another eligible component for new project applications in the FY 2018 CoC Program Competition. To utilize this component transition process, the CoC must fully reallocate the renewal project's funds and then the same project applicant must submit a new project application in e-snaps. Eligible components for new project applications in the transition process are: PH-PSH, PH-RRH, Joint TH and PH-RRH, SSO-CE, and HMIS. Refer to Section II.B.2. of the FY 2018 CoC Program Competition NOFA for the criteria that applicants must follow for transition grants. The following requirements must be met to transition eligible renewal grant(s) through a new project application:
 - a. the recipient of the renewal project(s) being eliminated through reallocation must be the same organization as the project applicant for the new project;
 - b. the maximum grant term is 1-year for the transition grant regardless of component type;
 - c. no more than 50 percent of the new grant awarded may be used within the 1-year term for costs of eligible activities of the originally funded renewal component(s);
 - d. transition grants are eligible for renewal after the 1-year term under the new component in subsequent fiscal years only for eligible activities of the new component; and
 - e. the renewal project applicant that intends to use this transition grant process must have the consent of its Continuum of Care and meet the reallocation standards outlined in Section III.C.3.q. of the FY 2018 CoC Program Competition NOFA.

Project applicants that intend to use the transition grant process must attach a copy of the most recently awarded project application(s) to the FY 2018 new project application. In most cases this will be a FY 2017 project application.



Important Reminders

1. HUD Forms and Certifications: HUD added the following forms directly into the project application: HUD-2880: Applicant/Recipient Disclosure/Update Report, HUD-50070: Certification for a Drug Free Workplace, Certification Regarding Lobbying, and SF-LLL: Disclosure of Lobbying Activities. For project applicants with multiple CoC Program-funded projects, HUD built functionality into the HUD-2880 in the Project Applicant Profile so project applicants are only required to fill out the form's fields once for the combined total amount for all new and renewal projects being submitted for their organization's annual CoC Program project applications.
2. Expansion Projects: HUD will allow project applicants to apply for a new expansion project under the DV Bonus, reallocation, and bonus processes to expand existing renewal projects that will increase the number of units, persons served, services provided to existing program participants, or to add additional activities to HMIS and SSO-CE projects. If the new expansion project will expand an existing eligible CoC Program renewal project HUD will not fund capital costs (i.e., new constructions, rehabilitation, or acquisition) and HUD will only allow a 1-year funding request. Closely review Section V.B.3.a.(6) and Section III.C.3.i of the FY 2018 CoC Program NOFA for the requirements related to expansion projects.

There are two types of expansion projects—CoC Program funded, or non-CoC Program funded. To apply for a new CoC Program expansion project or non-CoC Program expansion project, follow the instructions in this guide for the project type that matches the project being expanded.

- a. Expanding CoC Program Projects. Project applicants submits new project applications to expand the current operations of an eligible CoC Program renewal project, for which it is the recipient, by adding additional CoC Program funds to increase units, beds, persons served, services provided to existing program participants, or in the case of HMIS, increase the current HMIS grant activities within the CoC's geographic area. Under this type of expansion, HUD will only select the new expansion project for conditional award if it meets selection criteria and HUD selects the renewal project application for conditional award. If both the existing CoC Program renewal project and the new CoC Program expansion project are conditionally selected for funding, HUD will combine both the renewal and new expansion project during the post award process. Refer to Section V.B.3.a.(6) of the FY 2018 CoC Program NOFA for a complete list of requirements concerning new expansion projects.
- b. Expanding a non-CoC Program funded project. Project applicants submit new project applications that requests CoC Program funds to expand existing



effort not currently funded by existing eligible renewal project to a current homeless project that is funded from non-CoC Program fund sources and may only request funds for CoC Program project components that are eligible as new projects: PH-PSH, PH-RRH, Joint TH and PH-RRH component, HMIS, and SSO- CE. However, as stated in Section 426 of the Act, project applicants are prohibited from using CoC Program funds to replace state and local funds

Project applicants are prohibited from using expansion projects to provide existing program participants with the same housing and services funded by the CoC Program that they are currently receiving; rather, the project must:

- a. serve new program participants,
- b. provide existing program participants with an expanded level of services,
- c. provide existing program participants with facilities that meet health and safety standards,
- d. provide the same activities that are CoC Program-eligible but were previously paid for by a different eligible non-renewable source—Note: Applicants are prohibited from using CoC Program funds to replace state or local funds previously used, or designated for use, to assist homeless persons; for more information refer to 24 CFR 578.87(a); or
- e. provide expanded coordinated entry services to new and existing program participants, only eligible for SSO-CE.

New expansion project applications can apply for DV Bonus if the existing renewal is a Joint TH & PH-RRH, PH-RRH or SSO-CE. The new expansion project application requesting funds under the DV Bonus must meet all the specific DV Bonus requirements. However, the existing renewal project being expanded is not required to be dedicated to serving survivors of domestic violence, dating violence, sexual assault, or stalking as defined in 24 CFR 578.3 to dedicate new additional DV specific units, beds, persons served, or services provided to existing program participants.

Note: Project applicants applying for new expansion projects should use at least a portion of the renewal project name when naming the new expansion project and add the word “Expansion” at the end of the name.

3. **DedicatedPLUS Project:** A DedicatedPLUS project is a permanent housing-permanent supportive housing (PH-PSH) project where 100 percent of the beds are dedicated to serve individuals and families that meet the eligibility criteria outlined in Section III.C.3.f of the NOFA. Section V.C.3.(4)(b) of the FY 2018 CoC Program Competition NOFA permits renewal PH-PSH projects to change the classification of their project through the project application to be DedicatedPlus. This includes projects where 100 percent of the beds are currently dedicated to individuals and families experiencing chronic homelessness. Project applicants applying for renewal PSH projects will be



required to select “DedicatedPLUS,” “100% Dedicated” or “NA” on Screen 3C. Projects that select DedicatedPLUS may still choose to dedicate some of their beds to individuals and families that are chronically homeless. For further information, refer to pages 25-27 of this guide and Sections III.C.3.b and III.C.3.f. of the FY 2018 CoC Program Competition NOFA.

4. Updating Renewal Project Information: HUD expects that the information in a project’s proposed renewal application to remain the same from year-to-year unless changes are directed by HUD or approved through the grant agreement amendment process. Therefore, HUD strongly discourages projects applicants from making such changes when applying for renewal funding in the FY 2018 renewal application process.
5. Submit without Changes: Project applicants that imported a previous year’s renewal application data in e-snaps may “Submit without Changes” and confirm no significant changes have been made to the project’s application. For projects that do not import a previous year’s application data will automatically be set to “Make Changes” and all questions on each screen must be updated. The “Submit without Changes” function is not applicable for first time renewing project applications or for a project application that did not import a previous year’s information.

The new e-snaps Grant Consolidation Screen and Screen 3A contain questions that must be updated in each application. In addition, Screens 7A and 7B remain open for attachments and applicant certification. Changes to the Grant Consolidation Screen and Screens 3A, 7A, and 7B do not affect applicants’ ability to select “Submit without Changes.” However, on the Grants Consolidation Screen, if the project applicant indicates that the project application is consolidating grants, the system will not allow the project to be submitted as a “Submit Without Changes.”



Your Way Home PA-504 2018 CoC Program Competition Timeline

Updated July 13, 2018

CoC Governance Team Meeting to Review Application and Rating & Ranking

Process: July 13, 2018

Renewal Project Application Issued: July 13, 2018

New Project Application Issued: July 13, 2018

New Project Applications Due: August 15, 2018

Renewal Project Applications Due: August 15, 2018

CoC Governance Team Meeting to Finalize and Approve Project Ratings &

Ranking: August 24, 2018

Project Ratings & Rankings Published/Applicants Notified: August 24, 2018

Draft Application Posted for Community Review and Public Comments:

September 3, 2018

CoC Governance Team Meeting to Approve Consolidated Application: September

17, 2018

Consolidated Application Submitted to HUD: September 18, 2018

Collaborative Applicant: Program Office of Housing and Community Development,

Montgomery County Department of Health and Human Services

Contacts:

Carolyn K. Mayinja

PA-504 CoC Co-Chair

Office of Housing & Community Development

Montgomery County Department of Health & Human Services

PO Box 311

Norristown, PA 19404-0311

Tel: (610) 278-3540

Email: cmayinja@montkorn.com

Jason D. Alexander

Your Way Home Senior Advisor and PA-504 CoC Planning Consultant

Capacity for Change, LLC

Tel: 610-793-5063

Email: jason@capacityforchange.com

Dawson, Blair

From: Your Way Home Montgomery County
<bdawson=montcopa.org@mail120.suw151.rsgsv.net> on behalf of Your Way Home Montgomery County <bdawson@montcopa.org>
Sent: Friday, September 14, 2018 5:51 PM
To: Dawson, Blair
Subject: PA-504 FY 18 CoC Consolidated Application Open For Public Review

[View this email in your browser](#)



Facebook



Twitter



Website



Email



Website



NEWS

PA-504 FY 2018 CoC Program Competition: Documents Online for Public Review

The Montgomery County Office of Housing and Community Development is the Collaborative Applicant responsible for facilitating Your Way Home

Montgomery County's PA-504 Continuum of Care (CoC) Program Competition issued by the federal department of Housing and Urban Development (HUD), including the review, rating and ranking of new and renewal projects that provide housing and services for residents experiencing or at imminent risk of homelessness using these federal dollars.

The CoC makes all program competition documents available to the public for review and input. The final version of the completed CoC Consolidated Application for FY 2018 will be submitted to HUD on September 18, 2018 at 3:00 p.m. and made available to the public that same day. If you are interested in viewing any documents related to the competition, please follow the links below or visit the CoC webpage on the Your Way Home PA-504 website at <https://yourwayhome.org/continuum-of-care/>. Check back frequently for updates. Comments regarding the competition may be directed to Blair Dawson, Your Way Home Community Relations Manager at bdawson@montcopa.org.

PA-504 FY 2018 documents available online for public review include:

[PA-504 FY 2018 CoC Program Competition Consolidated Application and Priority Listing](#) (posted online for public review on September 14, 2018 following CoC Governance Team approval)

[PA-504 FY 2018 CoC Program Competition Application Priority Listing](#) (Posted August 24, 2018)

[PA-504 FY 2018 CoC Program Competition New and Renewal Project Applications](#) (link to website posting- September 14, 2018).

Please note, that check boxes for certain answers on the

application do not appear, including:

1E-3:

CoC or other Website, Email and Social Media for both columns

3B-2.3:

CoC conducts mandatory training for all CoC and ESG funded service providers on these topics and CoC has worked with ESG recipient(s) to adopt uniform anti-discrimination policies for all subrecipients.

3B-5b:

The CoC has identified steps it will take to help the CoC board and decisionmaking bodies better reflect the population served in the CoC.

The CoC is expanding outreach in geographic areas with higher concentrations of underrepresented groups.

The CoC has communication, such as flyers, websites, or other materials, inclusive of underrepresented groups

The CoC is training staff working in the homeless services sector to better understand racism and the intersection of racism and homelessness.

The CoC is establishing professional development opportunities to identify and invest in emerging leaders of different races and ethnicities in the homelessness sector.

The CoC has staff, committees or other resources

charged with analyzing and addressing racial disparities related to homelessness.

The CoC is educating organizations, stakeholders, boards of directors for local and national non-profit organizations working on homelessness on the topic of creating greater racial and ethnic diversity.

The CoC reviewed coordinated entry processes to understand their impact on people of different races and ethnicities experiencing homelessness.

The CoC is collecting data to better understand the pattern of program use for people of different races and ethnicities in its homeless services system.

The CoC is conducting additional research to understand the scope and needs of different races or ethnicities experiencing homelessness.

To learn more or download the HUD FY 2018 CoC Program Competition Notice of Funding Availability (NOFA): <https://www.hudexchange.info/resource/5719/fy-2018-coc-program-nofa/>

ABOUT US

Your Way Home Montgomery County is a transformational partnership between

government, philanthropy, nonprofits and community partners to end homelessness and housing instability for hardworking families and vulnerable residents throughout Montgomery County, which will make our community stronger for everyone.

If you aren't familiar with us, you can learn more at our website (yourwayhome.org).

OUR COMMUNITY AGENDA

To improve the housing stability, economic security and health of all Montgomery County residents.

OUR SHARED VISION

By creating more coordination, collaboration, communication and accountability among government, philanthropic, nonprofit and community partners, we will achieve better health, housing and financial outcomes for the most vulnerable members of our community.

OUR BOLD GOAL

Our bold goal is to reduce homelessness in Montgomery County by over 50% in the next five years while exiting people from homelessness to permanent housing more rapidly.



Facebook



Twitter



Website



Email

Copyright © 2018 Your Way Home Montgomery County, All rights reserved.

You are receiving this email because you are interested in ending homelessness in Montgomery County.

Our mailing address is:

Your Way Home Montgomery County
1430 DeKalb Street, 5th Floor
PO Box 311
Norristown, Pa 19401

[Add us to your address book](#)

Continuum of Care — Your Website

https://yourwayhome.org/continuum-of-care/

App YourWayHome.org Squarespace MailChimp Dashboard Welcome to Squarespace Eventbrite - Discover Planner Twitter / Notifications Carew Google MountCo Clarity

COC FY2018 GRANT APPLICATION MATERIALS:

Documents for Review:

- PA-504 CoC FY 2018 CoC Consolidated Application with Attachments
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Priority Listing
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Program Competition New and Renewal Project Applications
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Program Competition Ranking
Posted 8/24/18
- PA-504 CoC FY 2018 CoC Program Competition Rating Tool

Governance Charter:

- PA-504 Montgomery County, Pennsylvania: Continuum of Care Governance Charter
Posted 8/24/18

FY 2018 Policies, Priorities, and Applications:

- PA-504 FY 2018 CoC Program Competition: New Project Application Instructions
Posted 7/13/18
- CoC New Project Application Detailed Instructions: Fiscal Year 2018 CoC Program Competition
Posted 7/13/18
- FY 2018 New Project Application: Navigational Guide
Posted 7/13/18
- PA-504 FY 2018 CoC Program Competition: Renewal Project Application Instructions
Posted 7/13/18
- PA-504 FY 2018 CoC Program Competition: Renewal Application Summary
Posted 7/13/18

9:01 AM 9/11/2018

Twitter, Inc. (US) | https://twitter.com/YWHMontCo

yourwayhome.org |

Squarespace

MailChimp Dashboard

Welcome to Survey1

Eventbrite - Devices

Flarex

Twitter / Notifications

Camera

Google

MontCo

Clarify

Home

Moments

Notifications

Messages

Search Twitter

Tweet

Your Way Home

@YWHMontCo

Tweets

Following

Followers

Likes

Lists

Moments

1,088

438

441

298

0

0

Edit profile

Your Way Home

@YWHMontCo

Your Way Home (YWH) is a public-private partnership dedicated to improving the housing stability, economic security and health of Montgomery County residents.

Montgomery County, PA

yourwayhome.org

Joined May 2014

226 Photos and videos

Tweets

Tweets & replies

Media

Your Way Home @YWHMontCo · 4m

FY2018 PA-504 CoC Consolidated HUD Application up for public review

Continuum of Care

yourwayhome.org

Your Way Home @YWHMontCo · Sep 12

Thank You @MontcoCommerce for co-sponsoring yesterday's Equitable Access to Economic Opportunities Forum. The panel was rich with information and ideas to improve access to equitable employment.

MontcoCommerce @MontcoCommerce

#MontcoForward is about making @MontcoPA the place to live, work, learn, & invest for everyone; thank you @YWHMontCo for the work you do and for including us in today's Equitable Access Forum!

Your Way Home @YWHMontCo · Sep 11

Today's panelists taking questions and opening up the forum! Craig Cuthbert of @PACareerLink, Kate Houston of @Eamafdn, Suzan Neiger Gould of @marssonmain, and Jason Zerbe of @FirstStepStaffing

Your Tweet activity

Your Tweets earned 1,854 impressions over the last week

1,854

1,000

500

0

Sep 8

Sep 14

View your top Tweets

Who to follow · Refresh · View all

Followed by Emma Harp and others

Michael Shore @shikemore

Follow

Followed by Ken Lawrence Jr. and others

Evan Brandt @PottstownNJ

Follow

Followed by Jason Alexander and others

CynthiaH @Cynthianagen...

Follow

Find people you know

Trends for you · Change

2:11 PM
9/14/2018

https://www.facebook.com/yourwayhome montgomery county/

YourWayHome.org | Twitter | MailChimp | SurveyMonkey | Eventbrite | Discord | Planner | Twitter / Notification | Canvas | Google | MontCo | Clarity

Your Way Home Montgomery County

Page | Inbox | Notifications | Insights | Publishing Tools | Promotions | Settings | Help


Your Way Home Montgomery County
@yourwayhome montgomery county

Home | About | Photos | Events | Videos | Posts | Services | Shop | Groups | Notes | Offers | Jobs | Community | Info and Ads | Promote | Manage Promotions

Like | Following | Share

Your Way Home Montgomery County
Published by Blair Kindick Dawson · 2 min

FY 2018 PA-504 CoC Consolidated HUD Application up for public review:
<https://twitter.com/YWHMontCo/status/1040683905566175239>


YOUR WAY HOME
MONTGOMERY COUNTY

TWITTER.COM
Your Way Home on Twitter
FY2018 PA-504 CoC Consolidated HUD Application up for public...

Boost Post

Like | Comment | Share

Your Way Home Montgomery County shared a post.
Published by Blair Kindick Dawson · July 12

Your Way Home is continuing the Equity conversation (started at the

Contact Us


About | See All

Send Message


<http://www.yourwayh...> | Promote Website


Community | Suggest Edit


Team Members

 Blair Kindick Dawson

Pages Liked by This Page

 Homeless and Housing Coalition...

 Family Mentor of Montgomery C...

 Haven for Hope

English (US) | Español | Português (Brasil) | Français (France) | Deutsch

Privacy | Terms | Advertising | Ad Choices | Cookies | More | Facebook © 2018

Chat (0/0)

2:14 PM 9/14/2018

PA-504 CoC FY 2018 Process for Reallocation

The CoC utilized the HUD Rating and Ranking Tool to reallocate, rate and rank all renewal projects. This tool was also utilized to rate and rank all new projects received by the CoC. The CoC's reallocation process also considered the extent to which renewal projects were Housing First oriented, served high needs populations, including the percentage of individuals served:

- 1) with a disabling condition (physical disability, mental health condition, substance use, developmental disability, HIV/AIDS, and/or chronic health condition);
- 2) with no income; and
- 3) Who entered the project from a place not meant for human habitation.
- 4) Project Outcomes in the last 12 months.
- 5) Whether the Renewal Project was RRH, PSH or SSO project.

The CoC Governing Board prioritized RRH projects, followed by PSH projects and finally SSO projects.

Based on these criteria—the CoC Governing Board unanimously reallocated a portion of the Coordinated Homeless Outreach Center SSO Renewal project funding. This project was therefore ranked in Tier 2, Rank 17.

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:47 AM
To: Ken Smith ksmith@keystoneopp.org
Cc: Carolyn Mayinja cmayinja@montcopa.org, Arlene Daily ADaily@keystoneopp.org



Hi Ken,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:50 AM
To: Viviann Schorle vschorle@fsmontco.org
Cc: Carolyn Mayinja cmayinja@montcopa.org



Hi Viviann,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.


All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:49 AM
To: Susan Hays susanhays@hedwighouse.org
Cc: Carolyn Mayinja cmayinja@montcopa.org, Jenn Brown jbrown@pottstowncluster.org



Hi Susan,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:48 AM
To: Beth Sturman bsturman@laurel-house.org
Cc: Carolyn Mayinja cmayinja@montcopa.org, Jenny Boyer jboyer@laurel-house.org



Hi Beth,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.


All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:48 AM
To: Maria Macaluso mmacaluso@womenscentermc.org
Cc: Carolyn Mayinja cmayinja@montcopa.org



Hi Maria,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:47 AM
To: Timothy Pirog TPirog@montcopa.org
Cc: Carolyn Mayinja cmayinja@montcopa.org



Hi Tim,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:46 AM
To: Bruce Livingston blivingston@use.salvationarmy.org
Cc: Carolyn Mayinja cmayinja@montcopa.org, Ruth.Nieboer@USE.SalvationArmy.Org



Hi Bruce,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:48 AM
To: Kathi Krablin kkrablin@valleyyouthhouse.org
Cc: Carolyn Mayinja cmayinja@montcopa.org



Hi Kathi,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Final Ranking

The Continuum of Care (CoC) Program (24 CFR part 578) is designed to promote a community-wide commitment to the goal of ending homelessness; to provide funding for efforts by nonprofit providers, states, and local governments to quickly re-house homeless individuals, families, persons fleeing domestic violence, dating violence, sexual assault, and stalking, and youth while minimizing the trauma and dislocation caused by homelessness; to promote access to and effective utilization of mainstream programs by homeless individuals and families; and to optimize self-sufficiency among those experiencing homelessness.

The CoC Program is authorized by subtitle C of title IV of the McKinney-Vento Homeless Assistance Act, (42 U.S.C. 11381–11389) (the Act), and the CoC Program rule found in 24 CFR part 578 (the Rule). The FY 2018 funds were authorized by the Consolidated Appropriations Act 2018, (Public Law 115-141, approved March 23, 2018), (FY 2018 HUD Appropriations Act). The deadline for submitting applications to HUD for the FY 2018 CoC Program Competition is 8:00 PM Eastern time on September 18, 2018.

As stated in Section I.F of the FY 2018 CoC Program Competition NOFA, approximately \$2.1 billion is available in the FY 2018 CoC Program Competition NOFA, including up to \$50 million available for Domestic Violence (DV) Bonus projects, described in Section III.C.3.g of the NOFA. HUD may add to the total amount with any available funds that have been carried over or recaptured from previous fiscal years.

The estimated Annual Renewal Demand (ARD) for PA-504 is: \$2,888,253. The estimated Tier 1 ARD for PA-504 is: \$2,714,958. The amount available for the Permanent Housing Bonus is 6 percent of the CoC's Final Pro Rata Need (FPRN). The estimated Permanent Housing Bonus for New Projects for PA-504 is \$184,392. The estimated amount for DV Bonus Projects for PA-504 is \$307,319.

The PA-504 Collaborative Applicant, the Montgomery County Office of Housing and Community Development, used the FY 2018 HUD rating and ranking tool to score and rank all new and renewal project applications for the FY17 CoC Grant Competition. A task force comprised of CoC-elected PA-504 Your Way Home Governance Team members not competing in the competition reviewed and approved the scoring, ranking and tiering process. The PA-504 FY 2018 CoC Priority Listing was approved by the CoC Governance Team on August 24, 2018.

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Final Ranking

Project Name	Applicant	Project Type	Amount	Rank	Consolidation Type	Bonus Type	New / Re-Allocation
Tier 1 (94% of CoC FY 2018 Annual Renewal Demand - \$2,714,958)							
HMIS Dedicated Project	County of Montgomery	HMIS	\$139,242	1			
Pottstown HRC Rapid Rehousing 2015	Pottstown Cluster of Religious Communities	RRH	\$402,886	2	Individual		
Keystone Rapid Rehousing Renewal 2017	Keystone Opportunity Center	RRH	\$281,636	3			
Montgomery County Rapid Re-Housing for Families	Valley Youth House	RRH	\$112,028	4			
Pottstown Cluster Rapid Rehousing 2014	Pottstown Cluster of Religious Communities	RRH	\$52,432	5	Individual		
Pottstown HRC Rapid Rehousing 2015	Pottstown Cluster of Religious Communities	RRH	\$455,318	C2	Fully Consolidated		
FSMC Permanent Supportive Housing Montgomery County	Family Services of Montgomery County	PSH	\$350,015	6			
Project Vesta	Montgomery County, PA, Dept. of BH/DD	PSH	\$78,192	7	Individual		
Salvation Army Norristown PH2	The Salvation Army	PSH	\$215,816	8	Individual		
Permanent Solutions II	Montgomery County, PA, Dept. of BH/DD	PSH	\$326,497	9			
PHDI Program	The Salvation Army	PSH	\$102,290	10	Individual		
Salvation Army Norristown PH2	The Salvation Army	PSH	\$318,106	C8	Fully Consolidated		
MH/D&A Shelter Liaison Expansion	Hedwig House	PSH	\$189,898	11			

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Final Ranking

Project Name	Applicant	Project Type	Amount	Rank	Consolidation Type	Bonus Type	New / Re-Allocation
MontCo CoC PSH 2016	Keystone Opportunity Center	PSH	\$46,386	12			
Salvation Army Pottstown PSH Program	The Salvation Army	PSH	\$185,334	13			
Shelter Plus Care/ACT II	Montgomery County, PA, Dept. of BH/DD	PSH	\$26,064	14	Individual		
Montco BHDD / Penn Foundation S+C	Montgomery County, PA, Dept. of BH/DD	PSH	\$103,028	15	Individual		
Project Vesta	Montgomery County, PA, Dept. of BH/DD	PSH	\$207,284	C7	Fully Consolidated		
Keystone Rapid Rehousing Expand 2018	Keystone Opportunity Center	RRH	\$103,214	16		PH	New Project Expansion
Tier 1 Sub-Total	\$2,714,958						
	Tier 2 (6% of CoC FY 2018 Annual Renewal Demand - \$173,295 plus \$184,392 Permanent Housing Bonus and \$307,319 DV Bonus for \$665,006 total)						
Coordinated Homeless Outreach Center	Montgomery County, PA, Dept. of BH/DD	SSO	\$173,295	17			Reallocation - Grant Reduced
Valley Youth House	TH-RRH for Young Adults	TH-RRH	\$184,392	18		PH	New Bonus Project
Women's Center Domestic Violence Housing Project 2018	Women's Center of Montgomery County	TH-RRH	\$170,000	19		DV	New Bonus Project
Laurel House	Rapid Rehousing for Victims of Domestic Abuse	RRH	\$137,319	20		DV	New Bonus Project
Tier 2 Sub-Total	\$665,006						

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Final Ranking

Project Name	Applicant	Project Type	Amount	Rank	Consolidation Type	Bonus Type	New / Re-Allocation
Total (Tier 1 and 2)							\$3,379,964
CoC Planning Grant							\$92,196
Grand Total							\$3,472,160

Applicants were notified of their project acceptance(s) and terms by email on August 24, 2018. The Priority Listing was posted online for public view on August 24, 2018 at www.yourwayhome.org. For more information or inquiries, please contact:

Carolyn Mayinja
PA-504 CoC Co-Chair
Senior Manager - Housing & Homeless Programs
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
(610) 278-3540
cmayinja@montcopa.org

Jason D. Alexander, MPP
PA-504 Continuum of Care Consultant
Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com

Continuum of Care — Your Website

https://yourwayhome.org/continuum-of-care/

App YourWayHome.org Squarespace MailChimp Dashboard Welcome to Squarespace Eventbrite - Discover Planner Twitter / Notifications Carew Google MountCo Clarity

COC FY2018 GRANT APPLICATION MATERIALS:

Documents for Review:

- PA-504 CoC FY 2018 CoC Consolidated Application with Attachments
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Priority Listing
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Program Competition New and Renewal Project Applications
Posted 9/14/18
- PA-504 CoC FY 2018 CoC Program Competition Ranking
Posted 8/24/18
- PA-504 CoC FY 2018 CoC Program Competition Rating Tool

Governance Charter:

- PA-504 Montgomery County, Pennsylvania: Continuum of Care Governance Charter
Posted 8/24/18

FY 2018 Policies, Priorities, and Applications:

- PA-504 FY 2018 CoC Program Competition: New Project Application Instructions
Posted 7/13/18
- CoC New Project Application Detailed Instructions: Fiscal Year 2018 CoC Program Competition
Posted 7/13/18
- FY 2018 New Project Application: Navigational Guide
Posted 7/13/18
- PA-504 FY 2018 CoC Program Competition: Renewal Project Application Instructions
Posted 7/13/18
- PA-504 FY 2018 CoC Program Competition: Renewal Application Summary
Posted 7/13/18

9:01 AM 9/13/2018

From: Jason D. Alexander jason@capacityforchange.com 
Subject: PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing
Date: August 29, 2018 at 7:47 AM
To: Timothy Pirog TPirog@montcopa.org
Cc: Carolyn Mayinja cmayinja@montcopa.org



Hi Tim,

Attached is the final PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing, inclusive of rankings for consolidated renewal projects.

If you have any further questions, please let Carolyn and me know.

All the best,
Jason



PA-504 FY 2018
CoC Pr...ing.pdf

Jason D. Alexander, MPP
Your Way Home Senior Policy Advisor and Continuum of Care Consultant

Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com
www.capacityforchange.com
Twitter @CapacityFC

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing

The Continuum of Care (CoC) Program (24 CFR part 578) is designed to promote a community-wide commitment to the goal of ending homelessness; to provide funding for efforts by nonprofit providers, states, and local governments to quickly re-house homeless individuals, families, persons fleeing domestic violence, dating violence, sexual assault, and stalking, and youth while minimizing the trauma and dislocation caused by homelessness; to promote access to and effective utilization of mainstream programs by homeless individuals and families; and to optimize self-sufficiency among those experiencing homelessness.

The CoC Program is authorized by subtitle C of title IV of the McKinney-Vento Homeless Assistance Act, (42 U.S.C. 11381–11389) (the Act), and the CoC Program rule found in 24 CFR part 578 (the Rule). The FY 2018 funds were authorized by the Consolidated Appropriations Act 2018, (Public Law 115-141, approved March 23, 2018), (FY 2018 HUD Appropriations Act). The deadline for submitting applications to HUD for the FY 2018 CoC Program Competition is 8:00 PM Eastern time on September 18, 2018.

As stated in Section I.F of the FY 2018 CoC Program Competition NOFA, approximately \$2.1 billion is available in the FY 2018 CoC Program Competition NOFA, including up to \$50 million available for Domestic Violence (DV) Bonus projects, described in Section III.C.3.g of the NOFA. HUD may add to the total amount with any available funds that have been carried over or recaptured from previous fiscal years.

The estimated Annual Renewal Demand (ARD) for PA-504 is: \$2,888,253. The estimated Tier 1 ARD for PA-504 is: \$2,714,958. The amount available for the Permanent Housing Bonus is 6 percent of the CoC's Final Pro Rata Need (FPRN). The estimated Permanent Housing Bonus for New Projects for PA-504 is \$184,392. The estimated amount for DV Bonus Projects for PA-504 is \$307,319.

The PA-504 Collaborative Applicant, the Montgomery County Office of Housing and Community Development, used the FY 2018 HUD rating and ranking tool to score and rank all new and renewal project applications for the FY17 CoC Grant Competition. A task force comprised of CoC-elected PA-504 Your Way Home Governance Team members not competing in the competition reviewed and approved the scoring, ranking and tiering process. The PA-504 FY 2018 CoC Priority Listing was approved by the CoC Governance Team on August 24, 2018.

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing

Project Name	Applicant	Project Type	Amount	Rank	Consolidation Type	Bonus Type	New / Re-Allocation
	Tier 1 (94% of CoC FY 2018 Annual Renewal Demand - \$2,714,958)						
HMIS Dedicated Project	County of Montgomery	HMIS	\$139,242	1			
Pottstown HRC Rapid Rehousing 2015	Pottstown Cluster of Religious Communities	RRH	\$402,886	2	Individual		
Keystone Rapid Rehousing Renewal 2017	Keystone Opportunity Center	RRH	\$281,636	3			
Montgomery County Rapid Re-Housing for Families	Valley Youth House	RRH	\$112,028	4			
Pottstown Cluster Rapid Rehousing 2014	Pottstown Cluster of Religious Communities	RRH	\$52,432	5	Individual		
Pottstown HRC Rapid Rehousing 2015	Pottstown Cluster of Religious Communities	RRH	\$455,318	C2	Fully Consolidated		
FSMC Permanent Supportive Housing Montgomery County	Family Services of Montgomery County	PSH	\$350,015	6			
Project Vesta	Montgomery County, PA, Dept. of BH/DD	PSH	\$78,192	7	Individual		
Salvation Army Norristown PH2	The Salvation Army	PSH	\$215,816	8	Individual		
Permanent Solutions II	Montgomery County, PA, Dept. of BH/DD	PSH	\$326,497	9			
PHDI Program	The Salvation Army	PSH	\$102,290	10	Individual		
Salvation Army Norristown PH2	The Salvation Army	PSH	\$318,106	C8	Fully Consolidated		
MH/D&A Shelter Liaison Expansion	Hedwig House	PSH	\$189,898	11			

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing

Project Name	Applicant	Project Type	Amount	Rank	Consolidation Type	Bonus Type	New / Re-Allocation
MontCo CoC PSH 2016	Keystone Opportunity Center	PSH	\$46,386	12			
Salvation Army Pottstown PSH Program	The Salvation Army	PSH	\$185,334	13			
Shelter Plus Care/ACT II	Montgomery County, PA, Dept. of BH/DD	PSH	\$26,064	14	Individual		
Montco BHDD / Penn Foundation S+C	Montgomery County, PA, Dept. of BH/DD	PSH	\$103,028	15	Individual		
Project Vesta	Montgomery County, PA, Dept. of BH/DD	PSH	\$207,284	C7	Fully Consolidated		
Keystone Rapid Rehousing Expand 2018	Keystone Opportunity Center	RRH	\$103,214	16		PH	New Project Expansion
Tier 1 Sub-Total	\$2,714,958						
	Tier 2 (6% of CoC FY 2018 Annual Renewal Demand - \$173,295 plus \$184,392 Permanent Housing Bonus and \$307,319 DV Bonus for \$665,006 total)						
Coordinated Homeless Outreach Center	Montgomery County, PA, Dept. of BH/DD	SSO	\$173,295	17			Reallocation - Grant Reduced
Valley Youth House	TH-RRH for Young Adults	TH-RRH	\$184,392	18		PH	New Bonus Project
Women's Center Domestic Violence Housing Project 2018	Women's Center of Montgomery County	TH-RRH	\$170,000	19		DV	New Bonus Project
Laurel House	Rapid Rehousing for Victims of Domestic Abuse	RRH	\$137,319	20		DV	New Bonus Project
Tier 2 Sub-Total	\$665,006						

PA-504 FY 2018 Continuum of Care (CoC) Program Competition Priority Listing

Project Name	Applicant	Project Type	Amount	Rank	Consolidation Type	Bonus Type	New / Re-Allocation
Total (Tier 1 and 2)							\$3,379,964
CoC Planning Grant							\$92,196
Grand Total							\$3,472,160

Applicants were notified of their project acceptance(s) and terms by email on August 24, 2018. The Priority Listing was posted online for public view on August 24, 2018 at www.yourwayhome.org. For more information or inquiries, please contact:

Carolyn Mayinja
PA-504 CoC Co-Chair
Senior Manager - Housing & Homeless Programs
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
(610) 278-3540
cmayinja@montcopa.org

Jason D. Alexander, MPP
PA-504 Continuum of Care Consultant
Principal and Co-Founder
Capacity for Change, LLC
610.793.5063
jason@capacityforchange.com

Dawson, Blair

From: Your Way Home Montgomery County
<bdawson=montcopa.org@mail218.atl171.mcdlv.net> on behalf of Your Way Home Montgomery County <bdawson@montcopa.org>
Sent: Friday, July 13, 2018 3:27 PM
To: Dawson, Blair
Subject: PA-504 FY 2018 CoC Program Competition: New Project Application

[View this email in your browser](#)



Facebook



Twitter



Website



Email



Website



NEWS

PA-504 FY 2018 CoC Program Competition: New Project Application

The United States Department of Housing and Urban Development's (HUD) Continuum of Care (CoC)

Program is designed to promote communitywide commitment to the goal of ending homelessness; provide funding for efforts by nonprofit providers, and State and local governments to quickly rehouse homeless individuals and families while minimizing the trauma and dislocation caused to homeless individuals, families, and communities by homelessness; promote access to and effect utilization of mainstream programs by homeless individuals and families; and optimize self-sufficiency among individuals and families experiencing homelessness.

Your Way Home Montgomery County PA-504 CoC anticipates having **\$184,392** available for new Rapid Re-Housing projects. Populations to be served in order of priority include:

- Rapid Re-Housing for families and/or single adults.
- Rapid Re-Housing for youth aged 18 – 24.
- Joint TH and RRH component project for Transitional Age Youth aged 18 – 24.

Additionally, Your Way Home Montgomery County PA-504 CoC anticipates having up to **\$307,319** available for project(s) that are dedicated to survivors of domestic violence, dating violence, sexual assault, or stalking. Project types may include:

- RRH - Rapid Rehousing

To access the new project application, please click [here](#).

For more CoC Program Competition information and instructions, please visit the Continuum of Care page on the Your Way Home website by clicking [here](#).

If you have any issues downloading or accessing documents, please contact:

Blair Dawson
Community Relations Manager
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
Email: bdawson@montcopa.org

ABOUT US

Your Way Home Montgomery County is a transformational partnership between government, philanthropy, nonprofits and community partners to end homelessness and housing instability for hardworking families and vulnerable residents throughout Montgomery County, which will make our community stronger for everyone.

If you aren't familiar with us, you can learn more at our website (yourwayhome.org).

OUR COMM AGENDA

To improve the housing stability, economic security and health of all Montgomery County

OUR SHAR VISION

By creating more coordination, collaboration, communication and accountability

OUR BOL GOAL

Our bold goal is to reduce homelessness in Montgomery County by over 50% in the

residents.

among government, philanthropic, nonprofit and community partners, we will achieve better health, housing and financial outcomes for the most vulnerable members of our community.

next five years while exiting people from homelessness to permanent housing more rapidly.



Facebook



Twitter



Website



Email

Copyright © *|2018|* *|YWH|*, All rights reserved.

[unsubscribe from this list](#) [update subscription preferences](#)

This email was sent to bdawson@montcopa.org

[why did I get this?](#) [unsubscribe from this list](#) [update subscription preferences](#)

Your Way Home Montgomery County · 1430 DeKalb Street, 5th Floor · PO Box 311 · Norristown, Pa 19401 · USA



PA-504 2018 Continuum of Care (CoC) Program Competition: New Project Application

Updated July 13, 2018

Collaborative Applicant: Program Office of Housing and Community Development,
Montgomery County Department of Health and Human Services

Contacts:

Carolyn K. Mayinja
PA-504 CoC Co-Chair
Office of Housing & Community Development
Montgomery County Department of Health & Human Services
PO Box 311
Norristown, PA 19404-0311
Tel: (610) 278-3540
Email: cmayinja@montcopa.org

Jason D. Alexander
Your Way Home Senior Advisor and PA-504 CoC Planning Consultant
Capacity for Change, LLC
Tel: 610-793-5063
Email: jason@capacityforchange.com

About Your Way Home Montgomery County PA-504 CoC:

<https://yourwayhome.org/partners/>

To learn more or download the 2018 HUD CoC Grant Competition Notice of Funding Availability: <https://www.hudexchange.info/programs/e-snaps/fy-2018-coc-program-nofa-coc-program-competition/#nofa-and-notices>

New Project Detailed Instructions and Instructional Guide:

<https://www.hudexchange.info/resource/2909/coc-project-application-instructions-for-new-projects/>

2018 CoC Program Competition: Your Way Home PA-504 New Project Priorities

Your Way Home Montgomery County PA-504 CoC anticipates having \$184,392 available for new Rapid Re-Housing projects. Populations to be served in order of priority include:

- Rapid Re-Housing for families with young children aged 0 – 5.



- Rapid Re-Housing for youth aged 18 – 24.
- Rapid Re-Housing for other families and/or single adults.
- Joint TH and RRH component project for Transitional Age Youth aged 18 – 24.

RRH and Joint TH and RRH component projects must follow a Housing First approach and the maximum grant term for a DV bonus project is 1-year, regardless of component type.

In addition, Your Way Home Montgomery County PA-504 CoC anticipates having up to \$307,319 available for project(s) that are dedicated to survivors of domestic violence, dating violence, sexual assault, or stalking that meet the eligibility criteria established in paragraph (4) of the definition of homeless at 24 CFR 578.3. Project types may include:

- RRH - Rapid Rehousing

What's New for CoC Program New Project Applications in FY 2018

1. Funding Limitations: For FY 2018, new projects are eligible through "Reallocation," funds "Bonus" funds, a combination of "Reallocation + Bonus," funds or "DV Bonus" funds. Within each CoC, the total available amount for new (standard) "Bonus" projects are limited to 6 percent of the CoC's Final Pro-Rata Need (FPRN). In addition, "DV Bonus" funds are limited to 10 percent of the CoC's Preliminary Pro Rata Need (PPRN), or a minimum of \$50,000, whichever is greater, or a maximum of \$5 million, whichever is less of the CoC's Final Pro-Rata Need (FPRN).
2. Domestic Violence (DV) Bonus. In the FY 2018 CoC Program Competition, up to \$50 million is available for project(s) that are dedicated to survivors of domestic violence, dating violence, sexual assault, or stalking that meet the eligibility criteria established in paragraph (4) of the definition of homeless at 24 CFR 578.3. Refer to Section III.C.3.h of the FY 2018 CoC Program Competition NOFA for more information. CoCs may only apply for up to 10 percent of their Preliminary Pro Rata Need (PPRN), or a minimum of \$50,000, whichever is greater, or a maximum of \$5 million, whichever is less, to create up to three DV Bonus projects—up to one of each of the following component types:
 - a. PH-RRH - Rapid Rehousing project;
 - b. Joint TH and PH-RRH component project;
 - c. SSO-CE project to implement policies, procedures, and practices that equip CoC's coordinated entry to better meet the needs of survivors of domestic violence, date violence, sexual assault, or stalking.



PH-RRH and Joint TH and PH-RRH component projects must follow a Housing First approach and the maximum grant term for a DV bonus project is 1-year, regardless of component type.

HUD will select projects for the DV Bonus based on the CoC score, the project applicant's ability to demonstrate the need for the project, and the project applicant's capacity to implement a DV Bonus project to serve survivors of domestic violence, dating violence, sexual assault, or stalking, and their ability to house survivors and meet safety outcomes. Project applicants should carefully fill out the project application and ensure that this information is clearly conveyed. In addition, project applicants should select the "Domestic Violence" checkbox on screen "3B. Project Description," question #4 and select "DV Bonus" from the dropdown menu on screen "6A. Funding Request," question #2. Projects that are not selected as a DV Bonus projects will remain in the position ranked by the CoC and HUD select them for funding with available CoC Program funds.

3. Combination of Reallocated funds and Bonus funds in the same project. CoCs and project applicants may use both Reallocated and (standard) Bonus funds in a single new project. DV Bonus funds are not eligible to be combined with Reallocated or (standard) Bonus funds.
4. Transition Grant. The FY 2018 Appropriations Act permits CoCs to use reallocation to transition eligible renewal project(s) from their original component(s) to another eligible component for new project applications in the FY 2018 CoC Program Competition. To take advantage of this component transition, the CoC must fully reallocate the renewal project's funds and then the same project applicant must submit a new project application in e-snaps. Eligible components for new projects in the transition process are: PH-PSH, PH-RRH, Joint TH and PH-RRH, SSO-CE, and HMIS. Refer to Section II.B.2. of the FY 2018 CoC Program Competition NOFA for the criteria that applicants must follow for transition grants. The following requirements must be met to transition existing eligible renewal grant(s) through a new project application:
 - a. the recipient of the renewal project(s) being eliminated through reallocation must be the same organization as the project applicant for the new project;
 - b. the maximum grant term is 1 year for the transition grant regardless of component type.
 - c. no more than 50 percent of the new grant awarded may be used within the 1-year term for costs of eligible activities of the originally funded renewal component(s);



- d. transition grants are eligible for renewal after the 1-year term under the new component in subsequent fiscal years only for eligible activities of the new component; and
- e. the renewal project applicant that intends to use this transition grant process must have the consent of its Continuum of Care and meet the reallocation standards outlined in Section III.C.3.q. of the FY 2018 CoC Program Competition NOFA.

Project applicants that intend to use the transition grant process must also attach a copy of the most recently awarded project application(s). In most cases this will be a FY 2017 project application.

Transition grants are prohibited from the following FY 2018 CoC Program activities:

- a. using the CoC Program expansion process (see below for more information); and
- b. using the grant consolidation process (see above for more information).



PA-504 2018 CoC Program Competition: New Project Application Form

Instructions: Please complete this form electronically and return in MS Word format as an email attachment to Carolyn Mayinja at cmayinja@montcopa.org and Jason Alexander at jason@capacityforchange.com on or before Wednesday, August 15th 2018 at 3:00 PM EST for consideration by the Your Way Home CoC Governance Team.

Eligible project applicants for the CoC Program Competition are nonprofit organizations, local governments, and public housing agencies. Applications shall only be considered from project applicants in good standing with HUD, which means that the applicant does not have any open monitoring or audit findings, history of slow expenditure of grant funds- outstanding obligation to HUD that is in arrears or for which a payment schedule has not been agreed upon, or history of serving ineligible program participants, expending funds on ineligible costs, or failing to expend funds within statutorily established timeframes.

By submitting a new project application, applicants agree to:

1. Comply fully with Your Way Home Montgomery County's Operations Manual, including policies, procedures and forms. The Manual is available for download at <https://yourwayhome.org/resources-1/> or available upon request by email.
2. Accept all referrals from Your Way Home's Coordinated Entry System.
3. Participate fully in Your Way Home PA-504's Clarity Homeless Management Information System (HMIS).
4. Participate in Montgomery County's Annual Point-In-Time Count.
5. Be prepared to house the first household eligible for the project within six months of receiving the CoC grant award.
6. Meet Match requirements as noted by HUD in the CoC 2018 Program Competition NOFA.
7. Enroll vulnerable households regardless of income, current or past substance abuse, and criminal record—with the exception of restrictions imposed by federal, state, or local law or ordinance—as best as possible.

Q1. Please state the organization's legal name and provide contact information for the person authorized to submit the project application on it's behalf.

Q2. Does the organization agree to comply with the project applicant requirements listed above?



Q3. What is the proposed name of the new project?

Q4. What is the proposed new project type (i.e., RRH, Joint TH and RRH, etc.)?

Q5. Is this project a request to expand an existing project that is currently CoC Program-funded?

Q6. What population(s) will the project serve?

Q7. Will the project be located in Montgomery County, PA?

Q8. Please briefly describe the project, including an estimated number of households to be served per year, staffing, and organizational expertise/experience in delivering housing interventions with a Housing First approach.

Q9. How much funding is requested from the FY 2018 PA-504 CoC Grant? Please identify major budget line item expenses related to this funding amount.

Q10. Is the organization willing and able to provide the match funds should the grant be awarded?

PA-504 Montgomery County, Pennsylvania Continuum of Care Governance Charter

Adopted by the PA-504 Continuum of Care: December 16, 2014

Revised by the PA-504 Continuum of Care Governing Board:
September 18, 2018

PA-504 Montgomery County Continuum of Care Governance Charter

I. About the PA-504 Montgomery County Pennsylvania Continuum of Care

A. Core Purpose. The core purpose of the PA-504 Continuum of Care, with support from the Your Way Home public-philanthropic partnership, is to make homelessness in Montgomery County, Pennsylvania a rare, brief and one-time experience.

B. Guiding Principles. The guiding principles of the PA-504 Continuum of Care include:

- Housing First
- Progressive Engagement
- Diversity, Equity and Inclusion
- Trauma-Informed Care
- Culturally Relevant, Person-Centered Services
- Utilizing Evidence-Based and Promising Practices
- Data-Informed Decision-Making
- Cross-Sector Collaboration
- Fair Housing
- Incorporating the Voices of People with Lived Experience

C. Geographic Area. The geographic area defined as the “Montgomery County Continuum of Care for Homeless Services” is the entirety of Montgomery County, Pennsylvania, which is CoC number PA-504, called by HUD “Lower Merion/Abington/Norristown/Montgomery County CoC (PA-504).”

D. Accountability Structure. The PA-504 Montgomery County Continuum of Care is led by a 12-17 member Governing Board elected by, and comprised of representatives from, the Continuum of Care membership.

The CoC Governing Board and membership are supported by Your Way Home (YWH), a public-philanthropic partnership that promotes the health, housing stability and economic security of people experiencing or at imminent risk for homelessness in Montgomery County. Your Way Home is led by a 25-member cross-sector Advisory Council appointed by the Montgomery County Commissioners. Both the CoC Governing Board and the Your Way Home Advisory Council include representatives from the following:

- Public and philanthropic funders
- Nonprofit and community service providers
- People with the lived experience of homelessness
- Faith-based organizations
- Representatives from child welfare, domestic violence, education, food security, health, housing, mental/behavioral health systems and veterans affairs, among others.

PA-504 Montgomery County Continuum of Care Governance Charter

Backbone support for both the CoC and YWH are provided by a dedicated staff team and consultant in the Montgomery County Department of Health and Human Services' Office of Housing and Community Development. The Administrator of the Office of Housing and Community Development is accountable to the Montgomery County Board of Commissioners, Pennsylvania Department of Community and Economic Development, and the United States Department of Housing and Urban Development (HUD). Proposed applications from the CoC to HUD for CoC funding are reviewed by the County Commissioners for approval before submission to HUD.

II. Purpose of the Governance Charter

The PA-504 CoC Governance Charter (the Charter) defines the roles, responsibilities, membership criteria, code of conduct and meeting schedule for the CoC. The Charter also describes the role, composition and election process for the CoC Governing Board, the formally elected governing body of the CoC.

The PA-504 CoC Homeless Management Information System (HMIS) is appended to this Charter.

III. Responsibilities of the PA-504 Montgomery County Continuum of Care for Homeless Services.

The responsibilities outlined in this section are mandated by or aligned with the United States Department of Housing and Urban Development for every Homeless Continuum of Care. This section summarizes but does not replace CoC responsibilities as required, expected, and stated by HUD in the HEARTH Act of 2009 and CoC Interim Rule 24 CFR Part 578, effective August 30, 2012.

- A. Establish the CoC, define its geographic scope, establish a Governing Board which acts as the Board of the CoC, and authorize the Governing Board to act on behalf of the CoC.
- B. Operate the CoC by holding regular meetings, soliciting membership, electing a Governing Board to be the Board of the CoC, appointing action teams to carry out CoC activities, and annually reviewing this Governance Charter.
- C. Develop written standards, policies, and procedures as necessary to carry out other CoC activities in accordance with HUD requirements and to address, alleviate, and end homelessness. Such written standards, policies, and procedures may include but are not limited to CoC application procedures, program monitoring procedures, policies and procedures for program review and ranking, CoC grant budget changes or reallocations, procedures for the annual point-in-time count of people experiencing homelessness, centralized intake and assessment, policies for families and individuals fleeing domestic violence, and HMIS user policies and procedures.

PA-504 Montgomery County Continuum of Care Governance Charter

- D. Apply for CoC funds through a collaborative process that establishes funding priorities, ranks applications, and approves submission of applications in response to HUD's CoC Notice of Funding Availability (NOFA).
- E. Monitor and evaluate performance of the CoC and of recipient and subrecipient programs, and report outcomes to HUD.
- F. Designate a single Homeless Management Information System (HMIS), review and approve HMIS plans, ensure participation of CoC recipients and subrecipients in HMIS, and ensure that HMIS is administered in compliance with HUD requirements.
- G. Undertake planning activities, including engagement of the YWH Advisory Council, as well as other cross-sector, volunteer YWH Advisory and Action Teams; coordinating implementation of a housing and service system; conducting point-in-time counts of people experiencing homelessness; annually analyzing gaps in meeting needs of people who are homeless; providing information to Montgomery County and municipalities within the County required for their Consolidated Plans; and, consulting with the County Office of Housing and Community Development on its plan for allocating and evaluating Emergency Solutions Grants.
- H. Coordinate with all housing and emergency service providers, including recipients of Emergency Solutions Grants as well as the Your Way Home public-philanthropic partnership, to operate a Coordinated Entry System for anyone experiencing homelessness or a housing crisis in Montgomery County.
- I. Oversee and approve the annual HUD CoC grant program application, as well as all other HUD, FEMA and Commonwealth of Pennsylvania public grant programs that fund homeless services.

IV. Collaborative Applicant.

The PA-504 Montgomery County Continuum of Care designates the Montgomery County Office of Housing and Community Development as its Collaborative Applicant to the Homeless Continuum of Care program of the United States Department of Housing and Urban Development (HUD), with full responsibility for ensuring the timeliness, completion, and accuracy of CoC applications, and for ensuring full compliance with all pertinent HUD regulations during the application process, including but not limited to approval of CoC applications by the Montgomery County CoC membership. The Collaborative Applicant may also apply directly to HUD for CoC planning funds. The actions and decisions of the Collaborative Applicant are accountable to the Montgomery County CoC and its Governing Board.

V. Homeless Management Information System (HMIS) Lead Agency.

The Montgomery County Continuum of Care for Homeless Services designates the

PA-504 Montgomery County Continuum of Care Governance Charter

Montgomery County Department of Housing and Community Development to have full responsibility for selection, administration, training, and any and all other activities necessary to implementation of a single CoC-wide HMIS. The HMIS Charter is appended to this Governance Charter.

VI. Membership

A. CoC membership includes but is not limited to the following:

1. Continuum of Care recipient and subrecipient organizations. Each organization that is a recipient or subrecipient of CoC or Emergency Solutions Grant (ESG) funds is a member of the Montgomery County Continuum of Care, and therefore retains voting rights (Section VI.C.) and is subject to the Code of Conduct (Section VII).

2. Continuum of Care non-recipient organizations or individuals. Non-recipient organizations and interested unaffiliated individuals are welcome to join the Montgomery County Homeless CoC. As a county-wide system, the CoC needs, expects, and welcomes membership from all non-profit homelessness assistance providers, and from victim services providers, faith-based organizations, governments, businesses, advocates, Montgomery County Public Housing Authority, schools, social services providers, mental health agencies, hospitals, universities, affordable housing developers, law enforcement, organizations serving veterans, homeless or formerly homeless individuals, and any other entity or person concerned about addressing and ending homelessness in Montgomery County.

B. Registration. Each CoC recipient and subrecipient organization and each non-recipient organization or individual that desires to become a member of the Montgomery County Homeless CoC must register with the CoC. Registration includes but is not limited to contact information for all organizational representatives, and designating one person or position to cast votes on behalf of the organization. Registration confers voting rights on the organization or individual (Section VI.C.) and subjects the organization or individual to the Code of Conduct (Section VII). Registration will be managed by the Office of Housing and Community Development; the registrar will report the list of members periodically to the Governing Board (Section IX). All members are subject to the Code of Conduct (Section VII).

C. Solicitation of New Members. New members shall be invited to join the Montgomery County CoC on an ongoing basis, through the CoC webpage, social media, monthly e-mail newsletter, all in-person meetings and events and the annual Your Way Home Summit. The CoC Governing Board shall review membership at least annually to ensure that as many organizations or individuals as possible of those listed in Section A.2. are CoC members, with targeted outreach as necessary to expand the scope and diversity of CoC membership. In particular, targeted outreach shall be done at least annually to persons currently or formerly experiencing homelessness.

PA-504 Montgomery County Continuum of Care Governance Charter

D. Voting Rights. Each member organization has one vote. The organization's vote shall be cast by the individual or position designated by the organization at the time of registration of membership in the CoC (Section VI.A.3), unless the organization has changed its designated voter by notification to Your Way Home or other registrar designated by the Governing Board. An organization may argue a special exception and appeal this one organization-one vote rule to the Governing Board prior to a meeting where voting will be conducted; the Governing Board will render its decision prior to the meeting.

An unaffiliated individual member has one vote.

1. Mode of voting. A vote of the Montgomery County CoC may be taken during a Community Update meeting, special CoC meeting, or electronically.

2. Majority rule. The vote shall be carried by simple majority, unless the Governing Board notifies the CoC prior to votes being cast of a different margin for approval, such as a supermajority (two-thirds majority).

D. Matters Requiring a Vote of the Montgomery County CoC. A vote of the entire CoC is required to approve or amend the Governance Charter, to approve a Unified Funding Agency, to elect the Governing Board, to approve the application to the United States Department of Housing and Urban Development (HUD) for CoC funding, for decision making on any other matter about which HUD mandates a full CoC vote, and for decision making on any other matter about which the Governance Action Team deems appropriate or necessary for a full CoC vote.

E. Communication with Members. The Governing Board shall ensure appropriate communication with CoC members and prospective members, including but not limited to information about voting rights (Section VI.C.) and the Code of Conduct (Section VII), through the regular communications procedures of the CoC and the Your Way Home public-philanthropic partnership.

VII. Code of Conduct

A. The CoC Code of Conduct is as follows:

1. Conflict of interest defined. A conflict of interest is deemed to exist when the activities of an organization's representative during formal or informal CoC meetings or events, especially voting, monitoring, performance review, project ranking, and discussion about motions or matters which may be moved for a vote, have a direct or indirect bearing upon that organization's financial or funding status or upon that representative's personal financial status, or when for any other reason the organization's representative cannot be impartial. A conflict of interest is always deemed to exist when the organization's representative is an employee, member of the board of directors, regular volunteer, or a family member of an employee or board

PA-504 Montgomery County Continuum of Care Governance Charter

member of the organization.

2. To whom it applies. The Conflict of Interest Policy applies to every member of the Montgomery County Continuum of Care for Homeless Services.

3. Disclosure. It is incumbent upon the CoC member with a conflict of interest to disclose such conflict of interest immediately to the people present at the CoC meeting or event where the conflict emerges. If the conflict of interest is known prior to a meeting or event, disclosure can be orally or in writing directed to a Co-Chair of the CoC Governing Board. Minutes of a formal meeting must include conflict of interest disclosure.

4. Recusal. Any CoC member with a conflict of interest is recused from participating in pertinent activities including but not limited to voting, monitoring any recipient or subrecipient organization, performance review of any recipient or subrecipient organization, project ranking of any recipient or subrecipient organization, and discussion. Recusal shall be recorded in minutes of formal CoC meetings. However, the conflict of interest is not considered significant and no recusal is necessary if agreed upon by a two-thirds majority of those present.

5. Consequences of lack of disclosure. If a Co-Chair of the CoC Governing Board discovers an undisclosed conflict of interest, the Governing Board shall determine consequences, which can include verbal expression of concern, dismissal of the organization's representative from future CoC events, removal of CoC membership, lower ranking of that organization's project, or any other consequence deemed appropriate by the Governing Board.

B. Confidentiality Policy. As part of the activities and responsibilities of the CoC, it is normal for information related to an organization's financial and funding status and personal information about program participants to become known and shared. Apart from information that is public knowledge such as CoC grant amounts and project name and type, all members of the CoC are expected to keep organizational and personal information confidential.

C. Expectations of Members. All CoC members are expected to attend Community Update meetings, to keep informed about CoC matters by reading electronic and print communication materials, and to participate on Advisory and Action Teams as able and appropriate.

D. Periodic Review. This Code of Conduct, Section VII of the Governance Charter, shall be reviewed no less than every five years by the Governing Board or a Special Action Team established by the Governing Board for that purpose. Revisions to the Code of Conduct shall follow the procedures for Amending the Governance Charter in Section XIII below.

PA-504 Montgomery County Continuum of Care Governance Charter

VIII. CoC Meetings

A. Purpose. The COC will hold quarterly meetings open to all CoC members as well as members of the Your Way Home public-philanthropic partnership. The meeting agendas will include: HUD and other federal/state/local policy and funding updates, CoC Governing Board updates, Your Way Home partnership updates, votes on pertinent CoC matters, and for mutual sharing of information, networking, and support among members to help sustain the work of ending and preventing homelessness.

The agenda of the first CoC meeting held during the calendar year shall include election of CoC Governing Board members as needed to fill expired or vacant terms of office, with the exception of the year of the adoption of this Governance Charter, when the Governing Board shall be elected at a selected CoC meetings and terms of office continue through the subsequent calendar year.

B. Frequency. CoC meetings shall be held a minimum of four times per year.

C. Notification. The Office of Housing and Community Development shall ensure that all CoC members are notified of upcoming meetings through the CoC webpage, social media, e-newsletter and in-person meeting announcements.

D. Co-Chairs. CoC meetings will be opened and closed by a Co-Chair of the CoC Governing Board or another member they designate.

E. Quorum for Voting. A quorum for voting consists of a majority of CoC recipient and subrecipient organizations present.

F. Majority Rule. The vote shall be carried by simple majority, unless the Governing Board notifies the CoC prior to votes being cast of a different margin for approval, such as a supermajority (two-thirds majority).

G. Minutes. Written minutes will be taken by a member of the CoC Governing Board or a staff member in the Office of Housing and Community Development. Minutes shall include but are not limited to a record of those attending and the organizations the attendees represent, the outcome of votes, and recusals in compliance with the Code of Conduct (Section VII).

IX. Governing Board

A. Purpose and Responsibilities. By virtue of its election, the Governing Board is empowered by the Montgomery County Continuum of Care for Homeless Services to serve as its Board and thereby act on its behalf, including decision-making authority and the establishment of cross-sector, volunteer Advisory and Action Teams dedicated to specific policy and practice questions/issues, to carry out the CoC's responsibilities as listed in Section III above. It is the responsibility of the Governing Board to ensure

PA-504 Montgomery County Continuum of Care Governance Charter

that the CoC implements any and all plans, goals, activities, or action steps reported to the United States Department of Housing and Urban Development through the CoC funding application and/or through any other reporting mechanism. It is also the responsibility of the Governing Board to approve the methodology of the Point-In-Time Count of persons experiencing homelessness.

B. Membership. The Governing Board shall be comprised of a minimum of 12 and a maximum of 17 people, who together represent the key sectors, funders, service providers, and populations of people experiencing homelessness in Montgomery County, as well as the Your Way Home public-philanthropic partnership and the Collaborative Applicant.

The Governing Board shall be comprised of at least one representative from each of the following stakeholders (a given member may represent more than one stakeholder group):

- People with the lived experience of homelessness
- Coordinated Entry Service Providers
- Emergency Shelter Service Providers
- Rapid Re-Housing Service Providers
- Permanent Supportive Housing Service Providers
- Affordable Housing Providers
- Homeless Youth Service Providers
- Domestic Violence Survivor Service Providers
- Veterans Service Providers
- Mental/Behavioral Health Service Providers
- Early Childhood and/or K-12 Education System Representatives
- Public Funding Agencies
- Philanthropy
- Faith-Based Organizations
- Your Way Home public-philanthropic partnership Advisory Council
- Collaborative Applicant (Office of Housing and Community Development)

C. Nomination and Election. Election of CoC Governing Board members shall take place during a CoC meeting held during the first quarter of the calendar year. The Governing Board shall recruit, interview and nominate members for expired terms of office and for any other vacancies. Nominees shall be in accordance with Section IX.B. above. The Governing Board shall determine whether additional nominations will be accepted, including self-nominees, and if so, the date by which the Team must receive additional nominations. The Governing Board shall send the slate of nominees to the CoC membership no less than ten days prior to the date of the election. The election shall be held electronically through an online survey link emailed to all CoC members and announced/distributed at a CoC meeting the day before or on the date of the election.

PA-504 Montgomery County Continuum of Care Governance Charter

D. Term of Office. The members of the Governing Board shall serve a term of office of three years. Members may serve a total of no more than three consecutive terms of office before taking a required one-year break from service.

E. Removal. A member of the Governing Board must resign upon loss of employment at a CoC member organization. A member of the Governing Board may be removed by a two-thirds vote of the Governing Board for violation of the Code of Conduct. Any removal of a member of the Governing Board must be reported to the entire CoC electronically within three days of removal, and reported verbally at the next Community Update meeting.

CoC Governing Board members who do not actively participate in the majority of regularly scheduled CoC Governing Board and CoC membership meetings in any given year may be asked to resign in order to allow for another more active representative.

F. Vacancies. Nominees for vacant positions on the Governing Board due to resignation or other removal will be brought to the Governing Board by the Co-Chairs for vote by the Governing Board. The new member will serve out the term of the vacated position. The Co-Chairs will report the vote to the entire CoC within three days of the Governing Board meeting where the vote occurred.

G. Officers

1. Positions. The Officers of the CoC Governing Board shall be two Co-Chairs and one Secretary.

2. Responsibilities. The Co-Chairs are jointly responsible for overall functioning of the Governing Board, and for the specific responsibilities of meeting notification, nominations for filling vacant Governing Board positions, reporting to the entire CoC, and facilitating meetings of the Governing Board. The Secretary is responsible for recording pertinent discussion and CoC actions such as votes at Community Up-Date meetings; for recording meetings of the Governing Board, including reporting any conflicts of interest and recusal from voting or from other CoC activities in case of conflict of interest; and for keeping a permanent file of all minutes.

3. Selection.

a. Co-Chairs. One Co-Chair shall be a representative of the Collaborative Applicant and be appointed by the Collaborative Applicant. The other Co-Chair shall be selected by the Governing Board from among its members.

b. Secretary. The Governing Board shall select its Secretary.

4. Term of office. The terms of office of Co-Chairs and Secretary shall be concurrent with their terms of office on the Governing Board.

PA-504 Montgomery County Continuum of Care Governance Charter

H. Meetings

1. Purpose and Frequency. The Governing Board shall set its own regular schedule to meet a minimum of four times per year and as many additional times as necessary to ensure implementation of its purpose and responsibilities as described in Section IX.A. above. At the discretion of the Co-Chairs, meetings may be in-person or virtual, such as via teleconference.

2. Notification. The Co-Chairs are responsible for notifying all other members of the Governing Board of meeting dates, times, and agendas.

3. Quorum for Voting. A quorum shall consist of 50% of the members of the Governing Board. Voting may occur in-person or electronically via email. Governing Board members whose organizations may benefit from a specific vote or who have some other Conflict of Interest must recuse themselves from voting as per the Code of Conduct.

I. Accountability. The Governing Board is elected by the entire CoC, is empowered by the CoC, and is therefore accountable to the CoC for its decisions and actions. It is the responsibility of the Co-Chairs and the entire Governing Board to regularly report decisions and actions to the CoC.

J. Application of the Code of Conduct. The Code of Conduct, incorporating Conflict of Interest Policy, Confidentiality Policy, and Expectations of Section VII of this Governance Charter, applies to every member of the Governing Board of the Montgomery County Continuum of Care for Homeless Services. Upon election and annually thereafter, each member of the Governing Board shall sign a statement of adherence to the Code of Conflict, also disclosing any conflict of interest.

X. Advisory and Action Teams

A. Type and Selection

1. Advisory Teams. Advisory Teams are permanent Action Teams established to carry out one or more specific responsibilities of the Montgomery County Continuum of Care for Homeless Services as listed in Section III above.

2. Action Teams. The CoC Governing Board may establish Advisory and Action Teams to carry out one or more specific responsibilities of the CoC as listed in Section III above. Special Action Teams are dissolved by the Governing Board upon fulfillment of their responsibilities.

C. Membership of Action Teams. Members may be on a volunteer basis or

PA-504 Montgomery County Continuum of Care Governance Charter

appointed by the Governing Board. Action Team members may be CoC members or non-CoC members whose expertise is deemed helpful to fulfilling the Team's responsibilities.

D. Meetings of Action Teams. Meetings of Action Teams will be held as often as necessary to ensure fulfillment of their responsibilities. Meetings may be in-person or virtual, such as via teleconference.

E. Accountability of Action Teams. Action Teams are accountable to the entire CoC through reports on their work to the Governing Board and/or to the CoC at regular meetings or through electronic or other distribution to the CoC. Reports may be verbal or in writing. Verbal reports to the Governing Board shall be recorded in meeting minutes by the Secretary; written reports to the Governing Board shall be appended to the meeting minutes.

F. Application of the Code of Conduct. The Code of Conduct, incorporating Conflict of Interest Policy, Confidentiality Policy, and Expectations of Section VII of this Governance Charter, applies to every Action Team member.

XI. Approval of the Governance Charter. The Governance Charter was adopted and approved through a majority vote of the entire CoC membership.

XII. Annual Review of the Governance Charter.

The Governance Charter shall be reviewed annually during the first quarter of the calendar year by the Governing Board. If the review shows the necessity for amending the Charter, the procedure in Section XIII shall be followed. Charter review shall be reported to the entire Montgomery County Continuum of Care for Homeless Services.

XIII. Amending the Governance Charter.

As the elected representatives of the CoC membership, the Governing Board shall approval revisions to the Charter. A copy of the most recently approved version of the Charter will be posted on the CoC webpage and made available to all members upon request.

PA-504 Montgomery County Continuum of Care Governance Charter

APPENDIX

Your Way Home Montgomery County HMIS Governance Charter

1. Purpose

The Montgomery County Your Way Home Continuum of Care (CoC) operates a Homeless Management Information System (HMIS) to record and store client-level information about the numbers, characteristics and needs of persons who access homeless services and supportive services within the County of Montgomery, Pennsylvania. The HMIS also collects client information through the Montgomery County Your Way Home (YWH) Call Center, including information on persons at-risk of homelessness or those calling to access homeless services in Montgomery County.

Further, HMIS is used to aggregate data about the extent and nature of homelessness over time; produce an unduplicated count of homeless persons; understand patterns of service use; and measure the effectiveness of homeless assistance projects and programs. Data produced is used for evaluating program outcomes, producing required HUD reports and for planning and research purposes that may impact the direction of the Continuum of Care in Montgomery County.

2. Montgomery County CoC Responsibilities

The Montgomery County CoC is responsible for:

- Designating a single information system as the official HMIS software for the Montgomery County geographic area
- Designating an HMIS Lead to operate the HMIS.
- Providing governance of the HMIS Lead, including:
 - ☐ The requirement that the HMIS Lead enter into written HMIS Participation Agreements with each Contributing HMIS Organization (CHO), requiring that CHO's comply with federal regulations regarding HMIS and imposing sanctions for failure to comply; and
 - ☐ Imposing a participation fee, if any, charged by the HMIS;
- Maintaining documentation evidencing compliance with this part and with the governance agreement; and
- Reviewing, revising and approving the policies and plans required by federal regulation.

3. Designations

3.1. HMIS System

PA-504 Montgomery County Continuum of Care Governance Charter

The CoC designates CLARITY Human Services Database System from Bitfocus, located in Las Vegas, Nevada as the official HMIS for Montgomery County's CoC.

3.2. HMIS Lead

The Montgomery County CoC designates the Montgomery County Department of Housing & Community Development (DHCD) as the HMIS Lead to operate the HMIS system in Montgomery County.

4. Responsibilities of the HMIS Lead

The HMIS Lead is responsible for:

- Ensuring the operation of and consistent participation of Continuum of Care (CoC) funds, Emergency Solutions Grants (ESG) Program funds, Community Development Block Grant (CDBG) funds, HOME Investment Partnership Funds and the local Affordable Housing Trust Funds, including oversight of the HMIS and any necessary corrective action to ensure that the HMIS is in compliance with all applicable federal requirements;
- Developing written HMIS policies and procedures for CHO's in accordance with the most recently published 2010 Data Standards
- Executing a written HMIS Participation Agreement with each CHO, which includes the obligations and authority of the HMIS Lead and CHO, the requirements of the security plan and privacy policy with which the CHO must abide, sanctions for violating the HMIS Participation Agreement, and an agreement that the HMIS Lead and the CHO will process Protected Identifying Information consistent with the agreement;
- Serving as the applicant to the US Department of Housing and Urban Development (HUD) for CoC grant funds to be used for HMIS dedicated activities for the CoC's geographic area, as directed by the Montgomery County CoC, and entering into grant agreements with HUD to carry out the HUD-approved HMIS activities;
- Monitoring and enforcing compliance by all CHOs with HUD requirements and reporting on compliance to the CoC and HUD;
- Monitoring data quality and taking all necessary actions to maintain input of high-quality data by all CHOs, including the timely entry and exit dates for all client participants;
- The HMIS Lead must submit a security plan, an updated data quality plan, and a privacy policy to the CoC for approval within 6 months after the effective date of the HUD final rule establishing the requirements of these plans, and within 6 months after the date that any change is made to the local HMIS. The HMIS Lead must review and update the plans and policy at least annually. During this process, the HMIS Lead must seek and incorporate feedback from the CoC and CHO. The HMIS Lead must implement the plans and policy within 6 months of the date of approval by the Montgomery County CoC.

PA-504 Montgomery County Continuum of Care Governance Charter

5. Duties of the HMIS Lead

5.1. Montgomery County CoC HMIS Policies and Procedures

The HMIS Lead must adopt written policies and procedures for the operation of the HMIS that apply to the HMIS Lead, its CHOs, and the Continuum of Care. These policies and procedures must comply with all applicable Federal law and regulations, and applicable state or local governmental requirements. The HMIS Lead may not establish local standards for any CHO that contradicts, undermines, or interferes with the implementation of the HMIS standards as prescribed in this part.

5.2. Unduplicated Count

The HMIS Lead must, at least once annually, or upon request from HUD, submit to the Montgomery County CoC an unduplicated count of clients served and an analysis of unduplicated counts, when requested by HUD.

5.3. Reporting

The HMIS Lead shall submit all reports to HUD as required.

5.4. Privacy

The HMIS Lead must develop a privacy policy. At a minimum, the privacy policy must include data collection limitations; purpose and use limitations; allowable uses and disclosures; openness description; access and correction standards; accountability standards; protections for victims of domestic violence, dating violence, sexual assault, and stalking; and such additional information and standards as may be established by HUD in notice. Every organization with access to protected identifying information must implement procedures to ensure and monitor its compliance with applicable agreements and the requirements of this part, including enforcement of sanctions for noncompliance.

5.5. HMIS Standards

The HMIS Lead, in contracting an HMIS vendor, must require the HMIS vendor and the software to comply with the most recent HMIS standards issued by HUD as part of its contract.

5.6. Participation Fee

The HMIS Lead shall not charge a participation fee for CHOs. Each CHO will be provided the necessary CLARITY licenses at no cost to the CHO.

PA-504 Montgomery County Continuum of Care Governance Charter

6. Responsibilities of the CoC YWH HMIS/Data & Outcomes Action Team

The Action Team will work with the HMIS Lead to:

- Develop, annually review, and, as necessary, revise for CoC Board approval a privacy plan, security plan, and data quality plan for the HMIS, as well as any other HMIS policies and procedures required by HUD.
- Develop for Board approval and implement a plan for monitoring the HMIS to ensure that:

Recipients and Subrecipients consistently participate in HMIS;

HMIS is satisfying the requirements of all regulations and notices issued by HUD;

The HMIS Lead is fulfilling the obligations outlined in its HMIS Governance Agreement with the Montgomery County CoC, including the obligation to enter into written participation agreements with each contributing HMIS organization.

- Oversee and monitor HMIS data collection and production of the following reports:

- ☐ Sheltered point-in-time count;
- ☐ Housing Inventory Chart;
- ☐ Annual Homeless Assessment Report (AHAR); and
- ☐ Annual Performance Reports (APRs).

7. Responsibilities of the CHO

A CHO must comply with federal regulations regarding HMIS.

A CHO must comply with Federal, state, and local laws that require additional privacy or confidentiality protections. When a privacy or security standard conflicts with other Federal, state, and local laws to which the CHO must adhere, the CHO must contact the HMIS Lead and collaboratively update the applicable policies for the CHO to accurately reflect the additional protections.

8. Joint HMIS Lead-CHO Responsibility for Privacy

The HMIS Lead and the CHO using the HMIS are jointly responsible for ensuring that HMIS processing capabilities remain consistent with the privacy obligations of the CHO.

Your Way Home PA-504 Montgomery County HMIS Policy and Procedures Manual

Developed by the Your Way Home Data Action Team
on behalf of Your Way Home Montgomery County



Your Way Home PA-504 Montgomery County HMIS Policy and Procedures Manual

Table of Contents

Overview	3
YWH Data Systems	3
Agency/ Provider Coverage	3
Administration and Governance	4
Data System Management	4
Systems Administration	5
HMIS Governance Charter	5
Montgomery County HMIS Partnership Agreement	5
Partnership Agreement termination initiated by Authorized Agency	6
Partnership Agreement termination initiated by the Montgomery County Department of Housing and Community Development	6
User Account Creation	7
Passwords	7
User Agreements	7
Training	8
Policy Updates	8
Privacy and Security Plan	9
Open HMIS	9
Data Entry Requirement and Client Right to Opt Out	10
YWH Data Systems Release of Information	10
Entering Non-Identifying Information into YWH Data System	11
Revocation of Consent to Share Personally-Identifying Information in YWH Data Systems	12
Entering Non-Identifying Information into YWH Data System for all Persons Fleeing Domestic Violence	12
Call Center Procedures for Entering Personally-Identifying Information into YWH Data Systems	13
Ethical Data Use	13
Case Note Sharing	14
Case Note Frequency	14
Inter-agency referrals for clients with a YWH Code	15
Data Quality Plan	16
Timeliness	16
Completeness	17
Accuracy	18
Knowledge	19
Monitoring	20
Appendix	
A. List of participating agencies	23
B. HMIS Governance Charter	24
C. Montgomery County HMIS Partnership Agreement	30

D. User Authorization Form	41
E. User Agreement	42
F. Privacy Posting	45
G. Release of Information	47
H. Explanation of Data Sharing Policy	49
I. Your Way Home Call Center Consent Statement	51

Overview

Your Way Home Montgomery County (YWH) is a transformational partnership between government, philanthropy, non-profits, and community partners to solve the problem of homelessness in our community. Our vision is that by creating more coordination, collaboration, and communication between partners, we will achieve better health, housing, and financial outcomes for the most vulnerable members of our community.

Shared data systems are a core strategy for increasing communication between partners. Recognizing a need to enhance the use of data between and by YWH partner agencies, the YWH Data Action Team, comprised of members from government, non-profit, and philanthropic partners, created this manual to standardize system policies and to increase use of data collected through YWH's data systems. The following YWH Data Systems Policy and Procedure Manual is the result of their work, and is based on the following core priorities:

- Secure and ethical use of individuals' personal information;
- A high level of connectivity and transparency between partner agencies;
- Comprehensive training for data quality and for informed use of data at all levels.

YWH Data Systems

This policy manual is intended to provide a baseline of data sharing, security, training, and data quality policies for the client-level tracking systems in use by Your Way Home partner agencies under the administration of the Montgomery County Department of Housing and Community Development. These systems are collectively referred to as the YWH Data Systems. This includes:

- the county's Homeless Management Information System, Clarity Human Services;
- the YWH SmartSheet accounts used for referrals and client tracking;
- any additional systems adopted by Your Way Home via the Department of Housing and Community Development that allow for the sharing of client-level information across multiple agencies.

E-mail communication between agencies is not subject to the sharing policies in this manual; however, agencies are strongly encouraged to review their internal policies and practices to ensure that client-level information shared via e-mail is kept secure and confidential.

Agency/ Provider Coverage

Any agencies participating in Your Way Home Data Systems are subject to the policies and procedures outlined in this manual. The full list of participating agencies is included in Appendix A of this manual.

Administration and Governance

Administration of the YWH Data Systems is the responsibility of the Montgomery County Department of Housing and Community Development. This section outlines the roles and responsibilities within the Department for ensuring operation of the systems. The process for user management, authorized agency management, and training is also identified. Lastly, the partnership agreement policy is explained.

Governance of the HMIS is the joint responsibility of the Department of Housing and Community Development and the Your Way Home Leadership Council. The HMIS Governance Charter (Appendix B) explains the roles and processes for governance decisions relating to the county's HMIS.

1. Data System Management

Policy: As Your Way Home's primary staffing and administrative body and the HMIS Lead Agency, the Montgomery County Department of Housing and Community Development maintains and administers the YWH Data Systems on behalf of Your Way Home partner agencies, including but not limited to the county's Homeless Management Information System (HMIS) and YWH SmartSheet accounts.

The Department of Housing and Community Development is responsible for entering into and maintaining the terms of the contract with the selected HMIS database vendor. All final decisions regarding the purchase, implementation, and operation of the HMIS are subject to approval by the Department of Housing and Community Development or by the Board of Commissioners of the County of Montgomery where appropriate and applicable.

The Department of Housing and Community Development will own the license(s) and account information for any shared client management systems in use by Your Way Home. Any final decisions regarding the purchase or use of these systems are the responsibility of the Department of Housing and Community Development.

Procedure: The Department of Housing and Community Development will oversee and operate the HMIS on behalf of Your Way Home Montgomery County. The County of Montgomery, via the Department of Housing and Community Development, will maintain the contract with the HMIS vendor for use and operation of the HMIS. All final decisions regarding the HMIS, its operating policies and procedures, and the data collected via the database are subject to final approval by the Department of Housing and Community Development or the Board of Commissioners of Montgomery County, where appropriate and applicable.

The Department of Housing and Community Development will purchase licenses for other shared client management lists in use by Your Way Home and will manage the shared lists as appropriate and as needed for implementation of Your Way Home activities.

2. Systems Administration

Policy: The Department of Housing and Community Development's HMIS Program Manager will oversee the day-to-day operation of YWH Data Systems. The HMIS Program Manager or proxy will provide training, policy guidance and development, helpdesk assistance, and reporting assistance for participating agencies. In addition, all new accounts and account terminations will be processed and approved by the HMIS Program Manager or proxy. Changes to the HMIS user interface will be completed by the HMIS Program Manager in conjunction with the HMIS vendor; changes to other Your Way Home SmartSheet accounts will be completed by the HMIS Program Manager or Your Way Home Program Manager.

Procedure: The HMIS Program Manager will provide final approval for account authorizations or terminations for the YWH Data Systems. The HMIS Program Manager or proxy will provide training, policy guidance, helpdesk support, and reporting assistance to support agencies' full and appropriate use of the YWH Data Systems.

3. HMIS Governance Charter

Policy: In accordance with the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act, the Montgomery County Department of Housing and Community Development as the HMIS Lead Agency has developed and approved an HMIS Governance Charter describing the roles and responsibilities regarding the local HMIS. The HMIS Governance Charter is reviewed annually by the Your Way Home Governance Action Team.

Procedure: The Your Way Home Governance Charter Action Team will review and update as necessary the HMIS Governance Charter. The Department of Housing and Community Development is responsible for maintaining compliance with this Charter.

4. Montgomery County HMIS Partnership Agreement

Policy: Only authorized agencies will be granted access to the county's HMIS, Clarity HS. The Montgomery County Department of Housing and Community Development shall make the final determination to identify Authorized Agencies. The Executive Director of each Authorized Agency, or the Director of the County Department, will be required to sign a Montgomery County HMIS Memorandum of Understanding (MOU) binding their organization to the Your Way Home Data Systems Policy and Procedure Manual and all applicable Federal, State, and local laws and regulations regarding the handling of client data before access is granted.

Procedure: Authorized Agencies will be given a copy of the Montgomery County HMIS Partnership Agreement(Appendix C), the Your Way Home Data Systems Policy and Procedure Manual, and any other relevant paperwork in time for adequate review and signature. Once that paperwork has been reviewed and signed by the Executive Director, the Executive Director will need to identify one Clarity HS Agency Manager on the User Authorization Form, if he/she does not plan to fulfill this role. The HMIS Program Manager

will assist the Agency Manager in the identification, training, and enrollment of additional authorized users, and in the creation of programs and services appropriate for the agency.

5. Partnership Agreement termination initiated by Authorized Agency

Policy: Authorized Agencies may terminate the Montgomery County HMIS Partnership Agreement with or without cause upon 30 days written notice to the Montgomery County Department of Housing and Community Development according to the terms specified in the Montgomery County HMIS Partnership Agreement. The termination of the Montgomery County HMIS Partnership Agreement by the Authorized Agency may affect other contractual relationships with the Department of Housing and Community Development, the Your Way Home Leadership Council, and/or requirements set forth in contracts issued by the U.S. Department of Housing and Urban Development.

In the event of termination of the Montgomery County HMIS Partnership Agreement, all data entered into the HMIS will remain an active part of the county's HMIS.

Procedure: The person responsible for signing the Montgomery County HMIS Partnership Agreement (or a person in the same position within the agency) will notify the HMIS Program Manager 30 days or more from the date of termination. The HMIS Program Manager will disable all user accounts from the Authorized Agency on the date of termination of agreement.

6. Partnership Agreement termination initiated by the Montgomery County Department of Housing and Community Development

Policy: The Department of Housing and Community Development may immediately terminate the Montgomery County HMIS Partnership Agreement with written notice to the Authorized Agency in the event the Authorized Agency willfully violates or disregards the terms of the HMIS Partnership Agreement or the Your Way Home Data Systems Policy and Procedure Manual. The Department of Housing and Community Development may also terminate the Montgomery County HMIS Partnership Agreement with the agency with or without cause with 30 days written notice to the Authorized Agency and according to the terms specified in the Montgomery County HMIS Partnership Agreement. The termination of the Montgomery County HMIS Partnership Agreement may affect other contractual relationships with the Department of Housing and Community Development, the Your Way Home Leadership Council, the U.S. Department of Housing and Urban Development, or other funders. In the event of termination of the Montgomery County HMIS Partnership Agreement, all data entered into the HMIS will remain a part of the HMIS. If termination of the Montgomery County HMIS Partnership Agreement occurs, all Authorized Agency user accounts will be disabled on the date the Montgomery County HMIS Partnership Agreement is terminated.

Procedure: Agencies funded by the U.S. Department of Housing and Urban Development, either directly or indirectly through the Montgomery County Department of Housing and Community Development, are required to participate in the county's HMIS as a condition of

their funding. In the event of termination of the Montgomery County HMIS Partnership Agreement, the HMIS Program Manager will notify the Authorized Agency 30 days or more from the date of termination. In all cases of termination, the HMIS Program Manager will disable all user accounts on the date of termination of the agreement.

7. User Account Creation

Policy: The agency manager provides authorization for new users to the HMIS, SmartSheet, and any other Your Way Home shared client management systems. The agency manager will complete a User Authorization form for any new users to the HMIS, SmartSheet, and any other Your Way Home shared client management systems and will send to the HMIS Program Manager for account creation.

Only Montgomery County Department of Housing and Community Development staff is authorized to create new user accounts to the county's HMIS and/or Your Way Home client management systems. User accounts will be unique for each user and may not be exchanged or shared with other users.

Procedure: The agency manager or Executive Director will provide authorization for new users to the HMIS and/or Your Way Home client management systems by submitting a User Authorization Form (Appendix D) to the HMIS Program Manager. The HMIS Program Manager or proxy will arrange training on the appropriate system(s). Users must sign a User Agreement (Appendix E) prior to receiving access to the HMIS and/or Your Way Home client management lists.

8. Passwords

Policy: Users will have access to the HMIS and Your Way Home client management systems through a username and password. Passwords to HMIS must be changed a minimum of every 90 days. Users will keep passwords confidential. Under no circumstances shall a user share a password nor post a password in an unsecured location.

Procedure: Upon sign in with the temporary password, users will be required to create a unique password known only to him/her. Every 90 days, users will be prompted to change this password. Users that share their password with another person may be subject to termination from the HMIS.

9. User Agreements

Policy: Each user must sign a User Agreement before being granted access to YWH Data Systems. By signing the form, the user agrees to abide by the Your Way Home Data Systems Policy and Procedure Manual, to uphold the confidentiality of personal information, and to only collect, enter, and retrieve data from YWH Data Systems in ways relevant to the delivery of housing services.

Procedure: Each user will be provided a copy of the User Agreement by the HMIS Program Manager or proxy upon account authorization. The user will sign the User Agreement and return to the HMIS Program Manager or proxy. The original will be maintained by the Department of Housing and Community Development. Allowing user access without a signed user agreement is a violation of the Montgomery County HMIS Partnership Agreement and the Your Way Home Data Systems Policy and Procedure Manual and may result in sanctions.

10. Training

Policy: The HMIS Program Manager is responsible for defining the training requirements for all users for the YWH Data Systems. Agencies and staff are encouraged to request specific trainings as they are needed. The training requirements are outlined in the Training Policy. At a minimum, all new users are required to undergo training prior to account activation.

Procedure: The HMIS Program Manager or proxy will provide training for all users of the YWH Data Systems consistent with the requirements and standards outlined in the Training Policy, but at a minimum, for all new users before account activation.

11. Policy Updates

Policy: The Your Way Home Data Systems Policy and Procedure Manual is subject to review and revision as appropriate. New policies may be added to the Data Systems Policy and Procedure Manual by the HMIS Program Manager as needed. When substantive changes are needed, an Action Team may be called by the HMIS Program Manager to review these policy changes and to provide input and/or recommendations on policy and procedural changes. However or whenever changes are made to the Data Systems Policy and Procedure Manual, the HMIS Program Manager will provide an updated copy to all users and will make training available, if appropriate.

Procedure: The HMIS Program Manager may add policies and/or procedures as appropriate and needed to this manual at any time. When substantive changes are needed, the HMIS Program Manager will call an Action Team of relevant members and participants to provide input and recommendations as appropriate. The HMIS Program Manager retains final approval of all changes to the YWH Data Systems Policy and Procedure Manual.

When changes are made, a new copy of the YWH Data Systems Policy and Procedure Manual will be distributed to all users. Training on new policies will be made available by the Department of Housing and Community Development if appropriate or requested by authorized agencies.

Privacy and Security Plan

Your Way Home operates via a highly connected service structure, in which agencies providing different services work together, with an individual or family, to coordinate resources to best support the movement towards safe, affordable, and stable housing. The need to share information is inherent in this process; however, privacy and security of personal information is necessary to maintain integrity in the data systems and to foster trust between persons seeking services and the agencies providing those services.

This Data Sharing and Privacy Plan outlines the rights of individuals and families being served to protect their personally-identifying information. Outlined below are the specific procedures all staff must take in order to document that appropriate permission has been obtained to share this information, as well as how to properly de-identify the personal information of those clients that choose to opt out of sharing their personally-identifying information. This Plan also addresses protections specifically in place for persons fleeing domestic violence, sexual harassment, dating violence, or stalking. Lastly, this Plan outlines the ethical expectations for all users that have access to the YWH Data Systems.

1. Open Homeless Management Information System (HMIS)

Policy: Your Way Home is a collaborative, community-wide effort to provide housing-related services to families and individuals experiencing homelessness, and as such, partner agencies must have the ability to share pertinent information about joint clients' service needs. The county's HMIS, Clarity HS, is maintained as an open system in order to facilitate coordination between agencies serving the same client, and to assist persons experiencing homelessness with accessing services as quickly as possible, with a minimum of duplication of intake and data collection processes.

Agencies are responsible for ensuring that proper documentation of data sharing policies related to the sharing of personally-identifying information are followed for each client entered into the HMIS.

Procedure: The County's HMIS, Clarity HS, will be maintained as an open system. All Clarity HS participating agencies will have the following standardized sharing settings established:

System Component	Sharing Setting
Clients Created	Shared
Programs, Services, and Assessments	Full Shared
Case Files	Full Shared
Case Notes	Full Shared

The HMIS Program Manager will establish the data sharing settings for the agency during the agency set-up process.

2. Data Entry Requirement and Client Right to Opt Out

Policy: The collection of client-level data is necessary for Your Way Home's ability to understand how its programs are improving the housing stability of persons experiencing homelessness in Montgomery County. In order to ensure that Your Way Home partner agencies, leadership, and funders have an accurate understanding of program operations, it is essential that complete data is collected on all clients that receive services. As such, YWH Data Systems operate under a policy of implied consent in which participating agencies will enter client-level data as a function of a client accepting services or requesting a referral for services. Neither clients nor participating agencies have the right to refuse to enter client-level data into YWH Data Systems.

Participating agencies must post a policy statement at each of their client service sites alerting current and potential clients that data will be entered into YWH Data Systems.

All persons accessing services do have the right to opt out of sharing their personally-identifying information within YWH Data Systems. Agencies are prohibited from refusing to provide services to persons that choose to opt out of sharing their personally-identifying information. Agency staff must follow the protocol under the Policy on Entering Non-Identifying Information for those persons that choose to opt out of sharing personally-identifying information in YWH Data Systems.

Procedure: All participating agencies must post a Your Way Home Data Systems Policy Posting that clearly describes the data entered into YWH Data Systems and how that data is used (Appendix F). Agencies must enter all client-level data into YWH Data Systems in accordance with the Data Quality Policy requirements and will be sanctioned as outlined in the Data Quality Policy for not meeting the data entry requirements.

All agencies must collect a YWH Data Systems Release of Information (Appendix G) for all clients entered into Your Way Home Data Systems and maintain a copy of this form in the client's paper file. Agency staff will follow the protocol outlined in the Policy on Entering Non-Identifying Information for any clients choosing to opt out of sharing personally-identifying information.

3. YWH Data Systems Release of Information

Policy: Clients must provide informed consent in order for an agency to enter personally-identifying information into YWH Data Systems. Informed consent means that agency staff has explained what data is entered into YWH Data Systems, when that data may be accessed by other agencies, and the client's right to opt out of sharing their personally-identifying information in the YWH Data Systems. Staff is encouraged to use the Explanation of Data Sharing Policy (Appendix H) as a standard for this conversation. The client must sign the Release of Information and the form must be maintained with the agency's hardcopy file.

Since the YWH Data Systems Release of Information is agency-specific, a client receiving services from multiple agencies must sign a new Client Release of Information with every agency from which he receives services.

Clients have the right to opt out of including personally-identifying information in YWH Data Systems. If so, they must indicate as such on the Release of Information and the agency staff will follow the protocol for entering non-identifying information into the YWH Data Systems.

Procedure: Every client must sign the YWH Data Systems Release of Information (Appendix D) indicating their consent to share personally-identifying information or their choice to opt out of sharing this data. Staff is encouraged to use the Explanation of Data Sharing Policy (Appendix E) as a guide when discussing this policy with consumers. Participating agencies will retain a copy of this form with the client's file. Agencies will follow the protocol for entering non-identifying information for any client that chooses to opt out of sharing personally-identifying information.

4. Entering Non-Identifying Information into YWH Data Systems

Policy: Every client has the right to choose to opt out of sharing their personally-identifying information within the YWH Data Systems. "Personally-identifying information" refers to the combination of the person's name and date of birth or their full social security number. If a client chooses to opt out of sharing personally-identifying information, then the agency staff person will use the standardized convention for entering de-identified information into Clarity HS, which together is known as the client's YWH Code. The staff will record the YWH Code on the client's Release of Information where indicated. The YWH Code will be used in all YWH Data Systems in place of the client's name, such as on YWH SmartSheet accounts.

It is the participating agency's responsibility to accurately update and otherwise maintain the YWH Data System records of any client choosing to opt out of entering personally-identifying information. Agencies must establish internal policies ensuring the YWH Code is properly recorded and maintained in client's file such that a supervisor would be able to locate the YWH Code within the client's file at any time.

Procedure: For clients that choose not to share their personally-identifying information, staff will use the following convention to enter personally-identifying data into Clarity HS:

Client Profile Data Element	De-Identified Response
First Name	Last 4 digits of client's social security number
Last Name	Clarity-generated Unique Identifier
Quality of Name	Client Refused
Social Security Number	000-00-0000
Quality of Social Security Number	Client Refused
Date of Birth	1/1/year of birth
Quality of Date of Birth	Approximate or Partial DOB Reported

Example: John Smith, born August 1, 1978, with Social Security Number 768-75-8767, with the system-generated Unique Identifier of AAA1111:

First Name: 8767

Last Name: AAA1111

Social Security Number: 000-00-0000

Date of Birth: 1/1/1978

On the bottom of the client's Release of Information form, this would be recorded as the YWH Code of "8767 AAA1111."

The YWH Code would be used on any other YWH Data Systems in place of the client's name, such as on YWH SmartSheet accounts.

5. Revocation of Consent to Share Personally-Identifying Information in YWH Data Systems

Policy: Clients maintain the right to revoke their consent for sharing personally-identifying information in YWH Data Systems at any time. If a client decides to revoke this consent, they must sign a new Release of Information. The staff person responsible for entering data into YWH Data Systems must then overwrite the client's profile information using the protocol established in the Policy on Entering Non-Identifying Information and enter the YWH Code onto YWH SmartSheet records.

Procedure: Clients may revoke their consent to share personally-identifying information by signing a new Client Release of Information. The data entry staff is responsible for updating this personally-identifying information on the client's profile using the protocol as established in the Policy on Entering Non-Identifying Information within 5 business days of the client signing the form. The agency must maintain a copy of the new client Release of Information form with their paper file.

6. Entering Non-Identifying Information into YWH Data Systems for all Persons Fleeing Domestic Violence

Policy: Persons who identify as actively fleeing a domestic violence situation, or who are enrolling into services at a participating agency directly from a Domestic Violence service provider, will automatically be entered into YWH Data Systems using the procedure established in the Policy on Entering Non-Identifying Information.

A Release of Information must be signed; however, the staff person executing the form must assist the client in identifying the correct sharing option to reflect that no personally-identifying information is to be shared.

Procedure: Data entry staff will use the protocol established in the Policy on Entering Non-Identifying Information for any client that is actively fleeing a domestic violence situation or who is enrolled into a program at a participating agency directly from a domestic

violence service provider. Staff will assist the client in completing the Client Release of Information as appropriate and maintain this file with the hardcopy record.

7. Call Center Procedures for Entering Personally-Identifying Information into YWH Data Systems

Policy: The Your Way Home Call Center will collect verbal consent to enter basic client information onto YWH Data Systems. Your Way Home Call Center staff will explain the purposes of sharing information and will indicate within the HMIS record that the client has provided verbal consent for this information to be shared.

Clients who refuse to share their personally-identifying data, including persons identifying as actively fleeing a domestic violence situation, will be entered into the HMIS using the naming convention described in the Policy on Entering Non-Identifying Information. Call Center staff will then use the YWH Code on any other YWH Data System accounts, as described in the Policy on Entering Non-Identifying Information.

Procedure: Call Center staff will read the Your Way Home Call Center Consent (Appendix I) to clients before entering data into HMIS and will record the client's response on the HMIS profile page. The Call Center will use the protocol established in the Policy on Entering Non-identifying Information for any client that chooses not to share information and in accordance with the Policy on Persons Fleeing Domestic Violence. The Call Center will use the YWH Code in place of the person's name on any other YWH Data System accounts.

8. Ethical Data Use

Policy: All persons with access to YWH Data Systems are expressly prohibited from searching for, viewing, tampering with, or otherwise accessing client-level data on persons not assigned to their caseload, who have not been referred for services, or who otherwise are not working directly with the case worker or their supervisees.

Any person found to be violating this policy will be terminated immediately from YWH Data Systems. Any agency without the ability to enter data into the HMIS may be at risk for funding as a result of the statutory requirement for many federal grants to participate in the county HMIS.

Procedure: Persons with access to YWH Data Systems will use this privilege ethically and with the highest regard for client privacy and security of information. Any person found or discovered to be viewing, accessing, tampering with, using, downloading, or otherwise accessing information on clients not on their caseload or referred for services, or those of their supervisees, will be terminated immediately from YWH Data System access, and may be subject to further action as determined by the County of Montgomery.

9. Case Note Sharing

Policy: Case note features are available within Clarity HS for use by any participating agency, though some programs are required to keep case notes in order to better facilitate service coordination: (1) Referral notes are used by the Call Center to more fully describe housing crisis situations at the point of referral, (2) Housing Resource Center staff are required to maintain a publically-viewable case note on client's progress towards moving into permanent housing, and (3) Shelters are strongly encouraged to adopt similar protocols internally to better coordinate with other housing programs. These policies are described in the Housing Resource Center Policies and Procedures Manual and in each shelter's internal policy manual.

Participating agencies and case workers may wish to maintain internal case notes within Clarity HS as well.

Notes that are intended to be shared with other agencies for the purposes of service coordination must be maintained as publically viewable, including but not limited to notes on referrals and on housing plans. Case notes that are intended as internal notes should be marked as private at the discretion of the case worker.

Persons with access to Clarity HS are prohibited from viewing case notes recorded for clients other than those on their case load or referred for services, in accordance with the Policy on Ethical Data Use.

Policy: Notes intended for internal use only should be marked as private at the discretion of the case worker and/or agency.

10. Case Note Frequency

Policy: Every substantive interaction with a client must be documented via a case note in Clarity in order to provide the Your Way Home Program Manager and partner agency staff with timely information regarding a client's housing situation. A substantive interaction includes phone calls, emails, home visits, office visits, and other interactions in which the client's housing stability, case management plan, access or referrals to services, or other relevant information is discussed. The note must provide a basic description of the event, including assessment information, housing plan progress or action steps, or referrals to other services. The note must provide enough information so that others working with the client are able to determine the purpose and result of the interaction.

Each interaction must be documented via a note in Clarity HS within 2 business days of the interaction occurring. Interactions regarding street outreach, Call Center assessments and referrals, and shelter intake must be documented by Close of Business of the same day the interaction occurred. Case staff must mark notes as "private" per the guidelines of the Case Note Privacy policy.

Agencies will be monitored for compliance with this policy through desk monitoring and on-site monitoring of case files.

Procedure: Staff will record a case note in the Clarity HS client profile of the Head of Household within 2 business days of every substantive interaction with a client, or by Close of Business of the same day for interactions regarding Street Outreach, Call Center assessments and referrals, and shelter intake.

11. Inter-agency referrals for clients entered with YWH Code

Policy: Because Your Way Home’s coordinated entry network connects clients from referral sources (“referring agency”) to agencies that provide services (“receiving agency”), certain basic information about a client must be transmitted in order for the receiving agency to know the identity of the client they are contacting for service enrollment. However, clients that refuse to share information to the general Your Way Home database but still request services are entered into Clarity using the “Your Way Home Code”, which replaces the client’s actual name and other protected personal information.

To allow a receiving agency to know the identity of a person referred with a Your Way Home Code, the referring agency will send a message via the Secure Messaging Inbox containing the basic identifying information of the client being referred. The Secure Messaging Inbox is an encrypted messaging service, which provides more security and privacy than email for transmitting information between agencies.

Procedure: When referring a client with a Your Way Home Code to another agency for services, the referring agency will send a message containing the client’s YWH Code and actual name to the receiving agency via the Secure Messaging Inbox in Clarity HS.

Data Quality Plan

The core purpose of recording data is its use in planning and improving services. In order for the information recorded to be useful, data quality must be high, and those using it must trust that information has been recorded accurately and consistently across the system. The Data Quality Plan outlines the four main components of quality data in HMIS: timeliness, completeness, accuracy, and knowledge. The Plan explains the purpose of each component and how each component is measured and reviewed specifically within the HMIS. This Plan also explains the monitoring process for data quality and compliance with policies and procedures, and the ramifications if data quality and/or policies in the Data Systems Manual are not met.

Lastly, this Plan acknowledges that knowledge of how to use data for analysis and quality improvement is also a core component of a high quality data system. Training policies for agency managers/ directors and expectations for engagement in continuous quality improvement processes utilizing data are outlined here as well.

1. Timeliness

Rationale: Timely data entry ensures that information is accessible when needed, either for other service providers to understand a client's housing plan or current situation, to make bed availability known for persons seeking shelter, or to provide timely information to the community on the progress of Your Way Home towards meeting its goals.

Timeliness within this Plan refers to the time between when an event occurs and when it is recorded in the data system. Ideally, all events are recorded in real-time, especially those regarding referrals and program enrollment. In practice and policy, some lag time is permitted in order to acknowledge the competing demands on staff time.

A. Timeliness of Program Referral, Enrollment, and Exit Data

Policy: The Department of Housing and Community Development requires that all data be entered in a timely manner, as close to the date of entry, exit, or service provided as possible. Specifically:

- Persons calling the Call Center are entered into HMIS on the same day of their call.
- Information about referral acceptance/ denial will be entered into HMIS or SmartSheet on the same day of the decision.
- Persons enrolled into any program will be enrolled into the HMIS program within 2 business days of enrollment.
- Persons exiting a program will be exited from HMIS within 2 business days of exit.

Some programs administered by the Department of Housing and Community Development may require that data be entered into HMIS before invoices are processed.

Agencies that routinely enter data much later than the expected time frame will be required to be retrained in HMIS.

Procedure: The HMIS Program Manager will encourage agencies to manage timely data entry through regular sharing of bed availability reports, monitoring of shared client management systems, monitoring of Referral Statistics Reports, and review of financial assistance records for grant programs requiring HMIS data entry. Any concerns or issues regarding timeliness of data entry will be communicated to the agency by the HMIS Program Manager or the appropriate grant Program Coordinator; retraining or data entry technical assistance may be required if timeliness issues persist.

B. Timeliness of Status and Annual Assessments

Policy: *Status assessments* are required to be recorded in HMIS for any client whose previous assessment information has changed substantially. This must be recorded in HMIS within 30 days of the change having occurred.

Every person enrolled in a program for at least one year must also have an *annual assessment* recorded within 30 days of the anniversary of their program enrollment date.

Procedure: The HMIS Program Manager can automatically set reminders to user accounts to alert when an assessment is needed. It is the user's responsibility to complete this assessment as notified.

Proper completion of the Annual Performance Report requires that an annual assessment be completed for any client enrolled in the program for one year. The report will not include a status assessment used in place of the annual assessment or annual assessments that fall outside 30 days of the program enrollment anniversary. Agencies that do not enter the annual assessment within the appropriate timeframe will not be able to complete the Annual Performance Report successfully. This may affect an agency's ranking in the following year's CoC Grant Competition.

2. Completeness

Rationale: Data completeness is essential to Your Way Home's commitment to understanding and providing appropriate services to persons experiencing homelessness. On the program level, missing or incomplete information affects the ability to provide comprehensive care to the client. County-wide, missing or incomplete data negatively impacts the community's ability to accurately draw conclusions about progress or identify gaps in services being provided.

Completeness in this Plan refers to the percentage of Missing or Data Not Collected responses in all response categories. This information is reported via the Annual Performance Report.

Policy: The Department of Housing and Community Development's goal is to collect 100% of all data elements for all clients that receive services from an HMIS-participating agency; however, this may not be possible in all cases. The following represents the minimum threshold for data completeness:

- The acceptable range of Missing responses (including Data Not Collected) is as follows:
 - Shelter: 0-5%
 - Rapid Re-Housing: 0-2%
 - Transitional Housing: 0-2%
 - Permanent Supportive Housing: 0-2%
- 100% of clients served through HMIS participating programs will be entered into the HMIS system.
- 100% of clients entered into HMIS who exit a program will be exited from the HMIS system.

Procedure: The HMIS Program Manager will run an Annual Performance Report to review data quality for all programs once per quarter. Any agencies that exceed the threshold described above will be required to update the information in the HMIS to meet the requirements. Any agencies unable to complete the data entry to meet the thresholds will be required to undergo re-training in HMIS and data collection procedures.

3. Accuracy

Rationale: Data accuracy is needed in order to provide a true, complete understanding homelessness in Montgomery County. Inconsistency in responses or data collection procedures also negatively impacts data integrity, and the community's ability to use the data collected for program evaluation and service planning.

Accuracy in this Plan is understood as the use of correct response options, specifically the Client Doesn't Know, Client Refused, and Other responses, as well as the housing situation responses (i.e. Residence prior to program entry, Destination at exit). Accuracy is reviewed using the data quality section of the Annual Performance Report and the Residence Prior and Destination at Exit tables in the Annual Performance Report.

Policy: Data entered into HMIS must accurately reflect the data recorded in the agency's client file or other known information about the client. Use of the Client Doesn't Know, Refused, and Other categories must follow the definitions included in the 2014 HMIS Data Standards. Furthermore, the use of these responses should be very rare, as widespread use of these categories renders program evaluation inaccurate or incomplete. Agencies will be reviewed for meeting the following standards:

- “Client Doesn’t Know” responses reflect less than 1% of the responses in all categories;
- “Other” responses reflect less than 1% of the responses in all categories;
- “Client Refused” in responses other than personally-identifying information reflect less than 3% of all responses. “Client Refused” in Name and Social Security Number are expected to be less than 5%. “Client Refused” in Date of Birth is expected to be 0%.
- No data entered into HMIS will be incompatible with the program in which the client is enrolled. (For example, a man cannot be enrolled into a woman’s shelter.)

Procedure: Data accuracy will be reviewed quarterly or more by the HMIS Program Manager using the Annual Performance Report. Responses that may be inaccurate or that may have been entered incorrectly will be reviewed with the agency. Any agency that has entered inaccurate information will correct the data within 3 business days.

Any agency that consistently enters inaccurate information will be required to be retrained in HMIS. The HMIS Program Manager will provide specific guidance or training on any response categories or options that are identified as common problems across agencies.

4. Knowledge

Rationale: In-depth knowledge of the technical aspects of the HMIS is necessary for users to be able to properly record data, pull reports, and maintain security standards for their clients. As the system changes, training updates are needed so that users are familiar with new or additional reporting requirements. Once the core competencies of technical use are in place, agencies must know how to regularly make use of the data for program planning and service improvement.

Knowledge in this Plan refers to knowledge of the data elements and the appropriate response categories, proper implementation of the data sharing policies and procedures, technical use of the system, and knowledge of how to utilize data to evaluate and improve services.

Policy: Each user must have a working knowledge of HMIS responsibilities as they relate to their position as an intake/ case worker or agency manager. In addition to the initial training conducted when a user is registered, the following is required:

- All end-users will be registered with the Clarity HS listserv and are strongly encouraged to review all guidance as disseminated and to take advantage of training opportunities offered.

- All users may be required to attend at least one training per year, in order to ensure consistency across agencies in recording data and consistency with data sharing, privacy, and security policies.
- All agency managers/ directors may be required to undergo reporting training, at a minimum for understanding how to generate reports needed for grants and for annual submissions to HUD, as outlined in the Training Policy.
- All users may be required to undergo testing on the HMIS, specifically after start-up training and on a regular basis thereafter. Any user that does not pass the testing benchmarks on system use will be required to undergo re-training or other efforts to increase knowledge, as outlined in the Training Policy.
- Technical assistance with the HMIS, SmartSheet, and other shared client management systems will be provided by HMIS Program Manager as needed.
- Users are responsible for requesting specific training or guidance if their training needs are not being met. Requests can be sent to the HMIS Program Manager, or secondly to the Director of the Department of Housing and Community Development when appropriate.
- All agency managers are encouraged to actively participate in a continuous quality improvement process, in collaboration with the Department of Housing and Community Development, to understand how to measure progress toward goals using data collected from HMIS and other sources.

5. Monitoring

Rationale: Protection of client data and appropriate use of the HMIS system are required to maintain the integrity of Your Way Home's data systems. Regular agency-level monitoring is necessary to ensure that all policies and procedures are taking place, and that data is being entered accurately.

Monitoring in this Plan refers to desk monitoring and on-site monitoring. Desk monitoring is completed at least quarterly by the HMIS Program Manager to review timeliness, accuracy, and completeness of agency HMIS records. Desk monitoring is completed using the Annual Performance Report, Referral Statistics Reports, and other reports as needed. On-site monitoring includes reviewing hardcopy client files to ensure that the proper documentation has been obtained for sharing data within the HMIS, and ensuring that privacy postings are displayed at user workstations consistent with the policies outlined in the Data Sharing and Privacy Plan.

Policy: The HMIS Program Manager will conduct monitoring as follows:

- Desk monitoring will be conducted at least quarterly to review agency data quality of timeliness, accuracy, and completeness. Results will be shared with the agency manager. Questions or issues with the reports will be reviewed one-on-one. Agencies are expected to correct minor issues within 3 business days. Agencies with major issues may be asked to review the data with the HMIS Program Manager and establish a plan for correcting the data.
- On-site monitoring of client files to ensure the collection and proper execution of Client Release of Information forms will be conducted as part of the regular ESG, CDBG, and/or CoC Program Grant monitoring process in place by the Department of Housing and Community Development.
- If an agency does not meet the data quality requirements for two consecutive quarters, the HMIS Program Manager will bring the issue to the attention of the Director of the Department of Housing and Community Development. The agency will be required to provide a written plan for increasing data quality at their agency.
- Continuation of unresolved data quality issues will result in a discussion with the Director Department of Housing and Community Development and may include other county-level or other Your Way Home funders as appropriate. The Department of Housing and Community Development will assist the agency in developing a plan to resolve the agency's data issues, including recommendations for the action to be taken if the agency fails to adhere to the data quality policies ongoing.

Appendix A: List of Participating Agencies

Your Way Home Montgomery County Data Systems

Participating Agencies

Clarity HS Participating Agencies

Carson Valley Children's Aid
Creative Health Services, Inc.
Family Services of Montgomery County
Hedwig House, Inc.
Interfaith Housing Alliance
Interfaith Hospitality Network of the Main Line
Keystone Opportunity Center
Mental Health Association- Halfway There
Montgomery County Community Action Development Commission
Montgomery County Community Connections
Montgomery County Department of Housing and Community Development
Montgomery County Department of Behavioral Health and Developmental Disabilities
Montgomery County Department of Aging and Adult Services
Montgomery County Department of Veteran's Affairs
Montgomery County Emergency Services, Inc.
Montgomery County Office of Children and Youth
NJ-211
Pottstown Cluster of Religious Communities
Resources for Human Development- Coordinated Homeless Outreach Center
Resources for Human Development- Critical Time Intervention
The Salvation Army- Norristown
The Salvation Army- Pottstown
Valley Youth House
Veteran's Multi-Service Center
VNA Community Services, Inc

YWH SmartSheet Participating Agencies

Carson Valley Children's Aid
Keystone Opportunity Center
Interfaith Housing Alliance
Montgomery County Department of Housing and Community Development
NJ-211
Pottstown Cluster of Religious Communities
Resources for Human Development- Coordinated Homeless Outreach Center
Resources for Human Development- Critical Time Intervention
The Salvation Army- Norristown
The Salvation Army- Pottstown
Valley Youth House

Appendix B: HMIS Governance Charter

Your Way Home Montgomery County

HMIS Governance Charter

1. Purpose

The Montgomery County Your Way Home Continuum of Care (CoC) operates a Homeless Management Information System (HMIS) to record and store client-level information about the numbers, characteristics and needs of persons who access homeless services and supportive services within the County of Montgomery, Pennsylvania. The HMIS also collects client information through the Montgomery County Your Way Home (YWH) Call Center, including information on persons at-risk of homelessness or those calling to access homeless services in Montgomery County.

Further, HMIS is used to aggregate data about the extent and nature of homelessness over time; produce an unduplicated count of homeless persons; understand patterns of service use; and measure the effectiveness of homeless assistance projects and programs. Data produced is used for evaluating program outcomes, producing required HUD reports and for planning and research purposes that may impact the direction of the Continuum of Care in Montgomery County.

2. Montgomery County CoC Responsibilities

The Montgomery County CoC is responsible for:

- Designating a single information system as the official HMIS software for the Montgomery County geographic area
- Designating an HMIS Lead to operate the HMIS.
- Providing governance of the HMIS Lead, including:
 - ☐ The requirement that the HMIS Lead enter into written HMIS Participation Agreements with each Contributing HMIS Organization (CHO), requiring that CHO's comply with federal regulations regarding HMIS and imposing sanctions for failure to comply; and
 - ☐ Imposing a participation fee, if any, charged by the HMIS;
- Maintaining documentation evidencing compliance with this part and with the governance agreement; and
- Reviewing, revising and approving the policies and plans required by federal regulation.

3. Designations

3.1. HMIS System

The CoC designates CLARITY Human Services Database System from Bitfocus, located in Las Vegas, Nevada as the official HMIS for Montgomery County's CoC.

3.2. HMIS Lead

The Montgomery County CoC designates the Montgomery County Department of Housing & Community Development (DHCD) as the HMIS Lead to operate the HMIS system in Montgomery County.

4. Responsibilities of the HMIS Lead

The HMIS Lead is responsible for:

- Ensuring the operation of and consistent participation by recipients of Continuum of Care (CoC) funds, Emergency Solutions Grants (ESG) Program funds, Community Development Block Grant (CDBG) funds, HOME Investment Partnership Funds and the local Affordable Housing Trust Funds, including oversight of the HMIS and any necessary corrective action to ensure that the HMIS is in compliance with all applicable federal requirements;
- Developing written HMIS policies and procedures for CHO's in accordance with the most recently published 2010 Data Standards
- Executing a written HMIS Participation Agreement with each CHO, which includes the obligations and authority of the HMIS Lead and CHO, the requirements of the security plan and privacy policy with which the CHO must abide, sanctions for violating the HMIS Participation Agreement, and an agreement that the HMIS Lead and the CHO will process Protected Identifying Information consistent with the agreement;
- Serving as the applicant to the US Department of Housing and Urban Development (HUD) for CoC grant funds to be used for HMIS dedicated activities for the CoC's geographic area, as directed by the Montgomery County CoC, and entering into grant agreements with HUD to carry out the HUD-approved HMIS activities;
- Monitoring and enforcing compliance by all CHOs with HUD requirements and reporting on compliance to the CoC and HUD;
- Monitoring data quality and taking all necessary actions to maintain input of high- quality data by all CHOs, including the timely entry and exit dates for all client participants;

- The HMIS Lead must submit a security plan, an updated data quality plan, and a privacy policy to the CoC for approval within 6 months after the effective date of the HUD final rule establishing the requirements of these plans, and within 6 months after the date that any change is made to the local HMIS. The HMIS Lead must review and update the plans and policy at least annually. During this process, the HMIS Lead must seek and incorporate feedback from the CoC and CHO. The HMIS Lead must implement the plans and policy within 6 months of the date of approval by the Montgomery County CoC.

5. Duties of the HMIS Lead

5.1. Montgomery County CoC HMIS Policies and Procedures

The HMIS Lead must adopt written policies and procedures for the operation of the HMIS that apply to the HMIS Lead, its CHOs, and the Continuum of Care. These policies and procedures must comply with all applicable Federal law and regulations, and applicable state or local governmental requirements. The HMIS Lead may not establish local standards for any CHO that contradicts, undermines, or interferes with the implementation of the HMIS standards as prescribed in this part.

5.2. Unduplicated Count

The HMIS Lead must, at least once annually, or upon request from HUD, submit to the Montgomery County CoC an unduplicated count of clients served and an analysis of unduplicated counts, when requested by HUD.

5.3. Reporting

The HMIS Lead shall submit all reports to HUD as required.

5.4. Privacy

The HMIS Lead must develop a privacy policy. At a minimum, the privacy policy must include data collection limitations; purpose and use limitations; allowable uses and disclosures; openness description; access and correction standards; accountability standards; protections for victims of domestic violence, dating violence, sexual assault, and stalking; and such additional information and standards as may be established by HUD in notice. Every organization with access to protected identifying information must implement procedures to ensure and monitor its compliance with

applicable agreements and the requirements of this part, including enforcement of sanctions for noncompliance.

5.5. HMIS Standards

The HMIS Lead, in contracting an HMIS vendor, must require the HMIS vendor and the software to comply with the most recent HMIS standards issued by HUD as part of its contract.

5.6. Participation Fee

The HMIS Lead shall not charge a participation fee for CHOs. Each CHO will be provided the necessary CLARITY licenses at no cost to the CHO.

6. Responsibilities of the CoC YWH HMIS/Data & Outcomes Action Team

The Action Team will work with the HMIS Lead to:

- Develop, annually review, and, as necessary, revise for CoC Board approval a privacy plan, security plan, and data quality plan for the HMIS, as well as any other HMIS policies and procedures required by HUD.
- Develop for Board approval and implement a plan for monitoring the HMIS to ensure that:
 - Recipients and Subrecipients consistently participate in HMIS;
 - HMIS is satisfying the requirements of all regulations and notices issued by HUD;
 - The HMIS Lead is fulfilling the obligations outlined in its HMIS Governance Agreement with the Montgomery County CoC, including the obligation to enter into written participation agreements with each contributing HMIS organization.
- Oversee and monitor HMIS data collection and production of the following reports:
 - Sheltered point-in-time count;
 - Housing Inventory Chart;
 - Annual Homeless Assessment Report (AHAR); and
 - Annual Performance Reports (APRs).

7. Responsibilities of the CHO

A CHO must comply with federal regulations regarding HMIS.

A CHO must comply with Federal, state, and local laws that require additional privacy or confidentiality protections. When a privacy or security standard

conflicts with other Federal, state, and local laws to which the CHO must adhere, the CHO must contact the HMIS Lead and collaboratively update the applicable policies for the CHO to accurately reflect the additional protections.

8. Joint HMIS Lead-CHO Responsibility for Privacy

The HMIS Lead and the CHO using the HMIS are jointly responsible for ensuring that HMIS processing capabilities remain consistent with the privacy obligations of the CHO.

Appendix C: Montgomery County HMIS Partnership Agreement

Homeless Management Information System

Partnership Agreement

Between

The Montgomery County Department of Housing and Community Development

And

This Agreement is entered into on _____, 200__, between the Montgomery County Department of Housing and Community Development, hereafter known as MCHCD, and (_____), hereafter known as "Agency," regarding access and use of the Homeless Management Information System, hereafter known as the "HMIS."

I. Introduction

The HMIS is a shared homeless database that allows authorized personnel at various agencies called ("Partner Agencies") throughout Montgomery County to share information on common clients. Goals of the Homeless Management Information System include: ability to expedite client intake procedures, improved referral accuracy, increased case management and administrative tools, and the creation of a tool to follow demographic trends and service utilization patterns of families and individuals experiencing homelessness or those families and individuals on the verge of homelessness.

The project is administered by MCHCD, a governmental entity organized and governed by the laws of the Commonwealth of Pennsylvania. Pursuant to Resolution No. 04-C 335, the County of Montgomery, entered into a contract dated October 1, 2004, with MetSYS, Inc. to provide various services in connection with HMIS. On August 30, 2011, Bitfocus Inc. bought the assets of MetSYS and the County of Montgomery entered into an Agreement with Bitfocus Inc. to continue the provision of its HMIS services. The County's Transition Agreement with Bitfocus Inc is dated November 1, 2011. Pursuant with this Agreement Bitfocus, Inc. shall house the central server that hosts the Homeless Management Information System and shall limit access to the database to Partner Agencies participating in the project. Bitfocus, Inc. intends to protect Homeless Management Information System data to the utmost of its ability from accidental or intentional unauthorized modification, disclosure, or destruction, and Bitfocus, Inc. does this by utilizing a variety of methods to guard the data.

Ultimately, when used correctly and faithfully by all involved parties, the Homeless Management Information System is designed to benefit multiple stakeholders, including the community, homeless service agencies, and the consumer of homeless services, through a more effective and efficient service delivery system.

II. Confidentiality

- A. The Agency will uphold relevant Federal and State confidentiality regulations and laws that protect client records, and the Agency will only release confidential client records with written consent by the client, or the client's guardian, unless otherwise provided for in the regulations or laws. A client is anyone who receives services from the Agency and a guardian is one legally in charge of the affairs of a minor or of a person deemed incompetent.
1. The Agency will abide specifically by Federal confidentiality regulations as contained in the Code of Federal Regulations, 42 CFR Part 2, regarding disclosure of alcohol and/or drug abuse records. In general terms, the Federal regulation prohibits the disclosure of alcohol and/or drug abuse records unless disclosure is expressly permitted by written consent of the person to who it pertains or as other permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is not sufficient for this purpose. The Agency understands that Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patients.
 2. The Agency will abide specifically with the Health Insurance Portability and Accountability Act of 1996 and corresponding regulations passed by the U.S. Department of Health and Human Services. In general, the regulations provide consumers with new rights to control the release of medical information, including advance consent for most disclosures of health information, the right to see a copy of health records, the right to request a correction to health records, the right to obtain documentation of disclosure of their health information, and the right to an explanation of their privacy rights and how information may be used or disclosed. The current regulation provides protection for paper, oral, and electronic information.
 3. The Agency will abide specifically by Pennsylvania State Law regarding substance abuse and medical records.
 4. The Agency will provide a written explanation of the Homeless Management Information System to all clients and will provide all forms in English.
 5. The Agency will not solicit or input information from clients into the Homeless Management Information System unless it is essential to provide services or conduct evaluation or research.
 6. The Agency will not divulge any confidential information received from the Homeless Management Information System to any organization or

individuals without proper written consent by the client unless otherwise permitted by relevant regulations or laws.

7. Secondary disclosure of client information is prohibited. Each agency must garner client consent prior to disclosure and may not disclose information entered by another agency.
 8. Printed records disclosed to the client or another party should indicate: the person and/or agency the record is directed, the date, and the initials of the person making the disclosure.
 9. The Agency will ensure that all persons who are issued a User Identification and Password to the Homeless Management Information System within that particular agency abide by this Partnership Agreement, including the confidentiality rules and regulations. The Agency will ensure that each person granted Homeless Management Information System access at the Agency receives a Homeless Management Information System operational manual. This manual will include information on how to use the Homeless Management Information System as well as basic steps to ensure confidentiality. The Agency will be responsible for managing any of its own requirements that individual employees comply with Homeless Management Information System confidentiality practices, such as having employees sign a consent form stating their understanding of and Agreement to comply with Homeless Management Information System confidentiality practices.
 10. The Agency is responsible for conducting a background check on its users and is charged with the responsibility of prohibiting users that do not meet the criterion as established in the Homeless Management Information System Operating Policies and Procedures. Employees must sign a confidentiality Agreement and attend confidentiality and/or privacy training prior to the issuance of user rights. Confidentiality and/or privacy training is required annually for each user. It is the responsibility of the Agency to provide its system administrator documentation of training on an annual basis.
 11. The Agency understands that the file server-which will contain all client information, including encrypted identifying client information-will be physically located at the offices of Bitfocus, Inc.
- B. The Agency agrees to maintain appropriate documentation of client consent or guardian provided consent to participate in the Homeless Management Information System.
1. The Agency understands that informed client consent is required before any basic identifying client information is entered in to the Homeless Management Information System for the purposes of interagency sharing

of information. Informed client consent will be documented by completion of an authorization form and release of an information form developed by the Agency and approved by MCHCD.

2. The authorization referenced above, once completed, authorizes basic identifying client data to be entered into the Homeless Management Information System, as well as non-confidential service transaction information. This authorization form permits basic client identifying information to be shared among all Partner Agencies and non-confidential service transactions with select Partner Agencies, based on relevance.
3. If a client denies authorization to share basic identifying information and non-confidential service data via the Homeless Management Information System, the agency should use the anonymous client function.
4. The Agency will incorporate a Homeless Management Information System clause into existing Agency Authorization for Release of Information Form(s) if the Agency intends to input and share confidential client data with Partner Agencies. The Agency's modified Authorization for Release of Information Form(s) will be used when offering a client the opportunity to input and share information with the Homeless Management Information System beyond basic identifying data and non-confidential service information. The Agency will communicate to the client what information, beyond basic identifying data and non-confidential services will be shared if client consent is given. The Agency will communicate to the client that while the Agency can restrict information to be shared with select agencies, those other agencies will have access to the information and are expected to use the information professionally and to adhere to the terms of the Homeless Management Information System Partnership Agreement. Agencies with whom information is shared are each responsible for obtaining appropriate consent before allowing further sharing of client records. MCHCD and/or its contractors will conduct periodic audits to enforce informed consent standards, but the primary oversight of this function is between agencies.
5. If a client denies authorization to have information beyond basic identifying data and beyond non-confidential service transactions both entered and shared among the Homeless Management Information System, then this record must be locked and made available only to the entering agency program, therefore, precluding the ability to share information. A second option for agencies and clients when clients do not provide authorization to share data is to use the anonymous client function. If either of these choices is not selected, the Homeless Management Information System will not be used as a resource for information beyond basic identifying data and beyond non-confidential service transactions for that individual client and her/his dependents.

6. The Agency agrees to place all Client Authorization and/or Release of Information forms related to the Homeless Management Information System in a file to be located at the Agency's business address and that such forms be made available to MCHCD and/or its contractors for periodic audits. The Agency will retain forms related to the Homeless Management Information System for a period of six (6) years, after which time the forms will be discarded in a manner that ensures client confidentiality is not compromised.
 7. The Agency understands that in order to update, edit, or print a client's record, the Agency must have on file a current authorization from the client as evidenced by a completed Agency form pertaining to basic identifying data.
 8. The Agency understands MCHCD does not require or imply that services be contingent upon a client's participation in the Homeless Management Information System.
- C. The Agency and MCHCD understand the Homeless Management Information System, MCHCD as administrator, and Bitfocus, Inc. are custodians of data and not owners of data.
1. In the event the Homeless Management Information System ceases to exist, Partner Agencies will be notified and provided reasonable time to access and save client data on those served by the agency as well as statistical and frequency data from the entire system. Then, the information collected by the centralized server, located at Bitfocus, Inc. will be purged or stored. If the later occurs, the data will remain in an encrypted and aggregate state.
 2. In the event the County of Montgomery terminates its contract with Bitfocus, Inc., the custodianship of the data will be transferred to MCHCD or some other agency appointed by MCHCD, and all Partner Agencies will be informed in a timely manner.

III. Data Entry and/or Regular Use

- A. User identification and passwords are not permitted to be shared among users.
- B. The Agency agrees to follow the operating policies and procedures as approved by the MCHCD HMIS Committee.
- C. If an Agency has access to a client's basic identifying information, non-confidential service transactions, and confidential information and service records, it will be generally understood that a client gave consent for such access. However, before an agency can update, edit, or print such information, it must have informed client consent, evidenced by a current client authorization and/or

release of information form in writing pertaining to basic identifying data and/or an Agency modified form with a Homeless Management Information System Clause pertaining to confidential information.

- D. If a client has previously given permission to multiple agencies to have access to her/his information, beyond basic identifying information and non-confidential service transactions, and then chooses to eliminate one or more of these agencies, the Agency at which such desire is expressed will notify the partnering agency via electronic communication that the record will no longer be shared at the client's request. The Agency will then close the entire record, or simply lock out portions of the record to the other agency or agencies at the discretion of the originating agency. Partnering agencies understand that at no time should they penalize clients for requesting their information remain private.
- E. The Agency is responsible for setting the sharing parameters for files they enter and update.
- F. In the event that a client would like to rescind consent to participate in the Homeless Management Information System completely, the agency at which her/his desire is expressed, will work with the client to complete a brief form, which will be sent to that agencies system administrator to inactivate the client.
- G. The Agency will only enter individuals in the Homeless Management Information System that exist as clients under the Agency's jurisdiction.
- H. The Agency will not misrepresent its client base in the Homeless Management Information System by entering known, inaccurate information (i.e., Agency will not purposefully enter inaccurate information on a new record or to override information entered by another agency).
- I. The Agency will consistently enter information into the Homeless Management Information System and will strive for real-time, or close to real-time, data entry.
- J. The Agency understands that with a current client authorization form on file, it can update, edit, and print a client's basic identifying information.
- K. The agency understands that it must obtain a release of information to share confidential service transactions.
- L. The Agency understands that assessment screens are only allowed to be edited by the individual that originally enters the data, whether that individual is employed by the Agency or another Partner Agency. The Agency will create a separate assessment, as needed to indicate a change in a client's status, update, and to edit incorrect information.
- M. Discriminatory comments based on race, ethnicity, religion, national origin, ancestry, disability, age, gender, and sexual orientation are not permitted in the Homeless Management Information System.

- N. Offensive language and profanity are not permitted in the Homeless Management Information System.
- O. The Agency will utilize the Homeless Management Information System for business purposes only.
- P. The Agency understands MCHCD and/or Bitfocus, Inc. will provide initial training and periodic updates to that training to assigned agency staff about the use of the Homeless Management Information System; this information is then to be communicated to other Homeless Management Information System staff within the Agency.
- Q. The Agency understands that MCHCD and/or Bitfocus, Inc. will be available for troubleshooting and report generation, within reason during normal business hours.
- R. The Agency will keep updated virus protection software on Agency computers that access the Homeless Management Information System.
- S. Transmission of material in violation of any United States Federal or State regulations is prohibited and includes, but is not limited to: copyrighted material, material legally judged to be threatening or obscene, and material considered protected by trade secret.
- T. The Agency will not use the Homeless Management Information System with intent to defraud the Federal, State, or local government, or an individual entity, or to conduct any illegal activity.
- U. The Agency recognizes the MCHCD HMIS Committee to be the discussion center regarding the Homeless Management Information System, including process updates, policy and practice guidelines, data analysis, and software/hardware upgrades. The Agency will designate an assigned staff member to attend MCHCD HMIS Committee meetings regularly, and understands that MCHCD will be responsible for coordinating MCHCD HMIS Committee activities.

IV. Reports

- A. The Agency understands that it will retain access to all identifying and statistical data on the clients it serves. To clarify further, the Agency will have open access to all data and information originated by the Agency.

The Agency understands that access to data on those clients it does not serve will be limited to basic identifying information and non-confidential service data. Therefore, Agency understands that, with rare exception, a list of all persons in the Homeless Management Information System along with basic identifying information and non-confidential service data can be generated. An example of "rare exception" in which basic identifying information would not be available to

all Partner Agencies is if the anonymous client function is used and identifiers such as name, DOB, and Social Security Number are not entered into the system. A second example would be if the basic identifying data and service transactions are locked to only the entering agency, in which case such information would be available only in aggregate form.

- B. Reports obtaining information beyond basic identifying data and non-confidential services on individuals not served by the Agency are limited to statistical and frequency reports, which do not disclose identifying information.
- C. The Agency understands that before non-identifying system wide aggregate information collected by the Homeless Management Information System is disseminated to non Partner Agencies, including funders, it shall be endorsed by the MCHCD HMIS Committee and MCHCD.

V. Proprietary Rights of Bitfocus, Inc. and Database Integrity

- A. The Agency will not give or share assigned user identification and passwords to access the Homeless Management Information System with any other organization, governmental entity, business, or individual.
- B. The Agency will not cause corruption of the Homeless Management Information System in any manner or way. Any unauthorized access, unauthorized modification to the computer system information, malicious software, or interference with normal system operations, whether on the equipment housed by Bitfocus, Inc. or MCHCD or any computer system or network accessed by either of them will result in immediate suspension of services and MCHCD and/or Bitfocus, Inc. will pursue all appropriate legal action.

VI. Hold Harmless

- A. MCHCD makes no warranties, expressed or implied. The Agency, at all times will indemnify and hold MCHCD harmless from any damages, liabilities, claims, and expenses that may be claimed against the Agency; or for injuries or damages to the Agency or another party arising from participation in the Homeless Management Information System; or arising from any acts, omissions, neglect, or fault of the Agency or its agents, employees, licensees, or clients; or arising from the Agency's failure to comply with laws, statutes, ordinances, or regulations applicable to it or the conduct of its business. This Agency will also hold MCHCD harmless from negative repercussions resulting in the loss of data due to delays, non-deliveries, misdeliveries, or service interruption caused by the Agency's or another Partner Agency's negligence or errors or omissions, as well as natural disasters, technological difficulties, and/or acts of God. MCHCD shall not be liable to the Agency for damages, losses, or injuries to the Agency or another party other than if such is the result of gross negligence or willful misconduct of MCHCD.

- B. The Agency agrees to keep in force a comprehensive general liability insurance policy with combined single limit coverage of not less than five hundred thousand dollars (\$500,000) with MCHCD named as a certificate holder. Said insurance policy shall include coverage for theft or damage of the Agency's Homeless Management Information System related hardware and software, as well as coverage of the Agency's indemnification obligations under this Agreement. It is understood that units of government are self insured and as such, by signing this Agreement, units of government agree to defend MCDH against any action that arises as a result of their use of the system. If the insurance requirement poses an undue hardship to a non-profit wishing to participate, that Agency may apply for consideration directly to the Director of MCHCD.

VII. Terms and Conditions

- A. The parties hereto agree that this Agreement is the complete and exclusive statement of the Agreement between parties and supersedes all prior proposals and understandings, oral and written, relating to the subject matter of this Agreement.
- B. Neither party shall transfer or assign any rights or obligations without the written consent of the other party.
- C. This Agreement shall remain in force indefinitely. The exception to this term is if allegations or actual incidents arise regarding possible or actual breaches of this Agreement. Should such situations arise, MCHCD may immediately suspend access to the Homeless Management Information System until the allegations are resolved in order to protect the integrity of the system. If MCHCD determines that Agency breached this Agreement then MCHCD shall have the absolute right to terminate this Agreement. In the event that MCHCD terminates or suspends access to the Homeless Management Information System, then MCHCD shall have the absolute right to demand that Agency return the computer and printer, if provided by MCHCD, to MCHCD.
- D. This Agreement may be modified or amended by written Agreement executed by both parties with 30 days advance written notice.

By entering into this Partnership Agreement, the Agency agrees to follow all terms and conditions as set forth in the operating policies and procedures. Use of the Homeless Management Information System constitutes acceptance of these Terms and Conditions.

SIGNATURES ON NEXT PAGE

Montgomery County Department of Housing
and Community Development

By: _____
Josh Shapiro - Chairman
Montgomery County, Board of
Commissioners

Witness

AGENCY:

By: _____

Witness

Title: _____

Appendix D: User Authorization Form

Your Way Home Montgomery County Data Systems User Authorization Form

Agency manager: Please complete this form to authorize a new user to the Your Way Home Data Systems. Once completed, email the signed form to eward@montcopa.org.

Agency Name: _____

Agency Manager Signature: _____

Date of Authorization: _____

The following individuals are authorized access to Clarity HS at the privilege level indicated.

Housing Resource Center/ Call Center only: Indicate if the user is also granted access to the SmartSheet and/or Dropbox files.

			Housing Resource Center/ Call Center Only:	
User Name	Email	Clarity HS Privilege Level	YWH SmartSheet	YWH Dropbox

Clarity Privilege Levels:

- 1- Case worker: ability to create and edit client records, including referrals, and enroll clients in programs.
- 2- Agency manager: all abilities of case worker, plus ability to delete services and records at their agency.
- 3- Review only: view agency-level information and run reports.
- 4- Remove user: remove access from indicated databases.

Appendix E: User Agreement

Your Way Home Montgomery County Data Systems User Agreement

Agency Name: _____ Staff Name: _____

Your Way Home Montgomery County Data Systems, Clarity HS and SmartSheet accounts under the ownership of the Montgomery County Department of Housing and Community Development, collectively referred to as the YWH Data Systems, allow for client-level information storage and tracking to coordinate services between YWH partner agencies.

YWH Data Systems users ("Users") have an ethical and a legal obligation to ensure that the data is being collected, stored, accessed and used appropriately. It is also the responsibility of each User to ensure that client data is only used for the purposes for which it was collected. Proper user training, compliance with the terms and conditions as stated in the Montgomery County HMIS Partnership Agreement and the Your Way Home Data Systems Policy and Procedure Manual, and a clear understanding of client confidentiality are vital to achieving these goals.

Relevant points regarding client confidentiality include:

- A Release of Information form must be signed or verbal consent recorded for each client whose data is entered into the YWH Data Systems.
- No client may be denied services for failure to provide consent for data sharing in the YWH Data Systems.
- Clients have a right to inspect, receive a copy and request changes to their YWH Data Systems records.
- Users will maintain data within YWH Data Systems in such a way as to protect the identity of clients from nonparticipating agencies, individuals or entities.
- Any User failing to protect client confidentiality as set forth in this User Agreement, the Montgomery County HMIS Partnership Agreement, or the Your Way Home Data Systems Policy and Procedure Manual, may be denied access to YWH Data Systems.

I have received and read a copy of the Montgomery County HMIS Partnership Agreement and the Your Way Home Data Systems Policy and Procedure Manual and affirm the following:

1. I have received YWH Data System Privacy and Security Training.
2. I have read and will abide by the terms of the Montgomery County HMIS Partnership Agreement and the Your Way Home Data Systems Policy and Procedure Manual.
3. I will maintain the confidentiality of client data in YWH Data Systems as outlined above and as outlined in the Montgomery County HMIS Partnership Agreement and the Your Way Home Data Systems Policy and Procedure Manual.
4. I will only collect, enter, and extract data in YWH Data Systems relevant to the delivery of services to homeless, at risk of becoming homeless, and formerly homeless people experiencing a crisis in our community.

Staff signature

Date

Appendix F: Your Way Home Data System Privacy Posting

Your Way Home Montgomery County Data Systems

Privacy Posting

This Agency is a Your Way Home partner agency. As a partner, this Agency participates in shared databases to coordinate services and send referral information to other partner agencies. These databases are called the Homeless Management Information System (HMIS) and SmartSheet, collectively referred to as the Your Way Home Data Systems. The goal of the Your Way Home Data Systems is to assist us in determining your needs and to provide a record for evaluating the services we are providing to you.

We only collect information that is needed to provide you services, or that we consider relevant to helping us understand the scope and dimensions of homelessness in order to design effective service delivery. We do not use or disclose your information without written consent, except when required by our funders or by law, or for specific administrative or research purposes outlined in our privacy policy. By requesting and accepting services from this program, you are giving consent for us to enter your personal information into the Your Way Home data systems. Furthermore, if you request that we refer you to housing services from other Your Way Home partner agencies, you are giving consent to share your basic contact information for a referral to be made.

The collection and use of all personal information is guided by strict standards of confidentiality as outlined in our privacy policy. You may request a copy of this policy from this agency at any time.

Appendix G: Release of Information

Your Way Home Montgomery County Data Systems
Release of Information

For: _____ **Date of Birth:** _____
(Print First, Middle, Last Name)

Agency Name: _____

If you permit it, this agency may share limited information about you with other Your Way Home Montgomery County (YWH) agencies from who you may also seek services.

Please check (✓) a box:

- ☐ This agency may share my personally-identifying information within YWH Data Systems
- ☐ Please treat information about my children age 17 or younger the same as mine:

Names: _____

Please be aware that we may also share the following information:

- | | |
|--|--|
| • Services you receive | • Military history |
| • Your income | • Living situation and housing history |
| • Referral status for housing services | • Your housing plan |

- ☐ This agency may not share my personally-identifying information within YWH Data Systems

When you sign this form, it shows that you understand the following:

- We will not deny you help if you do not want us to share your personally-identifying information.
- Persons with access to YWH Data Systems are trained in security protocols to protect your data and are only permitted to view your data when you are specifically working with their agency.
- If you request services from another YWH agency, your information will be shared for referral purposes only.
- YWH may conduct follow-up surveys with you for the purposes of research or to improve consumer experience. Your name and contact information may be used by YWH administrative staff, or shared with third-party researchers, for these purposes. Your name and contact information will never be shared publically without your explicit consent.

Signature of client or guardian

Date

Signature of agency representative

Date

Agency Use Only: YWH Code _____

Appendix H: Sample Explanation of Data Sharing Policy

Your Way Home Montgomery County Data Systems

Sample explanation of data sharing policy

Our agency is part of a network of housing providers called Your Way Home Montgomery County. You may receive services from another Your Way Home agency. In order to reduce the number of times you are asked your basic information, Your Way Home agencies share basic information on clients who receive services. We do this through private, secure databases. The databases are only able to be accessed by staff that has been trained on security and privacy procedures. By signing this form, you allow us to share information with agencies that you may receive services from. You may request a list of the Your Way Home agencies at any time.

Appendix I: Your Way Home Call Center Consent Statement

Your Way Home Montgomery County Data Systems Call Center Verbal Consent Statement

Montgomery County collects specific data to help identify the needs and create better programs for families within the community. The information which you share is protected by limiting access to the data. Every person who has access to your data has agreed to maintain the confidentiality and security of that information. You are not obligated to release your personally-identifying information; however, allowing your personally-identifying information to be entered does help the agencies to contact you when we refer you for services. Would you allow me to enter your personally-identifying information into the YWH Data Systems?

“Personally-identifying information” refers to your name, date of birth, and social security number.

2018 HDX Competition Report

PIT Count Data for PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

Total Population PIT Count Data

	2016 PIT	2017 PIT	2018 PIT
Total Sheltered and Unsheltered Count	398	310	291
Emergency Shelter Total	229	192	226
Safe Haven Total	0	0	0
Transitional Housing Total	149	99	45
Total Sheltered Count	378	291	271
Total Unsheltered Count	20	19	20

Chronically Homeless PIT Counts

	2016 PIT	2017 PIT	2018 PIT
Total Sheltered and Unsheltered Count of Chronically Homeless Persons	17	40	20
Sheltered Count of Chronically Homeless Persons	13	35	17
Unsheltered Count of Chronically Homeless Persons	4	5	3

2018 HDX Competition Report

PIT Count Data for PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

Homeless Households with Children PIT Counts

	2016 PIT	2017 PIT	2018 PIT
Total Sheltered and Unsheltered Count of the Number of Homeless Households with Children	70	56	44
Sheltered Count of Homeless Households with Children	70	56	44
Unsheltered Count of Homeless Households with Children	0	0	0

Homeless Veteran PIT Counts

	2011	2016	2017	2018
Total Sheltered and Unsheltered Count of the Number of Homeless Veterans	10	9	13	8
Sheltered Count of Homeless Veterans	10	7	9	8
Unsheltered Count of Homeless Veterans	0	2	4	0

2018 HDX Competition Report

HIC Data for PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

HMIS Bed Coverage Rate

Project Type	Total Beds in 2018 HIC	Total Beds in 2018 HIC Dedicated for DV	Total Beds in HMIS	HMIS Bed Coverage Rate
Emergency Shelter (ES) Beds	198	24	161	92.53%
Safe Haven (SH) Beds	0	0	0	NA
Transitional Housing (TH) Beds	75	15	60	100.00%
Rapid Re-Housing (RRH) Beds	368	0	368	100.00%
Permanent Supportive Housing (PSH) Beds	228	6	222	100.00%
Other Permanent Housing (OPH) Beds	0	0	0	NA
Total Beds	869	45	811	98.42%

2018 HDX Competition Report

HIC Data for PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

PSH Beds Dedicated to Persons Experiencing Chronic Homelessness

Chronically Homeless Bed Counts	2016 HIC	2017 HIC	2018 HIC
Number of CoC Program and non-CoC Program funded PSH beds dedicated for use by chronically homeless persons identified on the HIC	62	73	123

Rapid Rehousing (RRH) Units Dedicated to Persons in Household with Children

Households with Children	2016 HIC	2017 HIC	2018 HIC
RRH units available to serve families on the HIC	82	90	79

Rapid Rehousing Beds Dedicated to All Persons

All Household Types	2016 HIC	2017 HIC	2018 HIC
RRH beds available to serve all populations on the HIC	366	255	368

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

Summary Report for PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

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.

	Universe (Persons)		Average LOT Homeless (bed nights)			Median LOT Homeless (bed nights)		
	Submitted FY 2016	FY 2017	Submitted FY 2016	FY 2017	Difference	Submitted FY 2016	FY 2017	Difference
1.1 Persons in ES and SH	852	712	67	85	18	56	74	18
1.2 Persons in ES, SH, and TH	985	815	141	157	16	70	89	19

b. This measure is based on data element 3.17.

This measure includes data from each client's Living Situation (Data Standards element 3.917) response as well as time spent in permanent housing projects between Project Start and Housing Move-In. This information is added 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.

The construction of this measure changed, per HUD's specifications, between FY 2016 and FY 2017. HUD is aware that this may impact the change between these two years.

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

	Universe (Persons)		Average LOT Homeless (bed nights)			Median LOT Homeless (bed nights)		
	Submitted FY 2016	FY 2017	Submitted FY 2016	FY 2017	Difference	Submitted FY 2016	FY 2017	Difference
1.1 Persons in ES, SH, and PH (prior to "housing move in")	852	744	102	180	78	77	116	39
1.2 Persons in ES, SH, TH, and PH (prior to "housing move in")	985	852	172	240	68	92	132	40

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

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

This measures 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.

After entering data, please review and confirm your entries and totals. Some HMIS reports may not list the project types in exactly the same order as they are displayed below.

	Total # of Persons who Exited to a Permanent Housing Destination (2 Years Prior)	Returns to Homelessness in Less than 6 Months		Returns to Homelessness from 6 to 12 Months		Returns to Homelessness from 13 to 24 Months		Number of Returns in 2 Years	
		FY 2017	% of Returns	FY 2017	% of Returns	FY 2017	% of Returns	FY 2017	% of Returns
Exit was from SO	8	0	0%	1	13%	0	0%	1	13%
Exit was from ES	321	23	7%	16	5%	35	11%	74	23%
Exit was from TH	90	1	1%	5	6%	2	2%	8	9%
Exit was from SH	0	0		0		0		0	
Exit was from PH	356	33	9%	15	4%	29	8%	77	22%
TOTAL Returns to Homelessness	775	57	7%	37	5%	66	9%	160	21%

Measure 3: Number of Homeless Persons

Metric 3.1 – Change in PIT Counts

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

This measures the change in PIT counts of sheltered and unsheltered homeless person as reported on the PIT (not from HMIS).

	January 2016 PIT Count	January 2017 PIT Count	Difference
Universe: Total PIT Count of sheltered and unsheltered persons	398	310	-88
Emergency Shelter Total	229	192	-37
Safe Haven Total	0	0	0
Transitional Housing Total	149	99	-50
Total Sheltered Count	378	291	-87
Unsheltered Count	20	19	-1

Metric 3.2 – Change in Annual Counts

This measures the change in annual counts of sheltered homeless persons in HMIS.

	Submitted FY 2016	FY 2017	Difference
Universe: Unduplicated Total sheltered homeless persons	993	830	-163
Emergency Shelter Total	857	727	-130
Safe Haven Total	0	0	0
Transitional Housing Total	184	134	-50

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

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

	Submitted FY 2016	FY 2017	Difference
Universe: Number of adults (system stayers)	74	132	58
Number of adults with increased earned income	1	7	6
Percentage of adults who increased earned income	1%	5%	4%

Metric 4.2 – Change in non-employment cash income for adult system stayers during the reporting period

	Submitted FY 2016	FY 2017	Difference
Universe: Number of adults (system stayers)	74	132	58
Number of adults with increased non-employment cash income	14	23	9
Percentage of adults who increased non-employment cash income	19%	17%	-2%

Metric 4.3 – Change in total income for adult system stayers during the reporting period

	Submitted FY 2016	FY 2017	Difference
Universe: Number of adults (system stayers)	74	132	58
Number of adults with increased total income	14	30	16
Percentage of adults who increased total income	19%	23%	4%

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

Metric 4.4 – Change in earned income for adult system leavers

	Submitted FY 2016	FY 2017	Difference
Universe: Number of adults who exited (system leavers)	89	121	32
Number of adults who exited with increased earned income	28	31	3
Percentage of adults who increased earned income	31%	26%	-5%

Metric 4.5 – Change in non-employment cash income for adult system leavers

	Submitted FY 2016	FY 2017	Difference
Universe: Number of adults who exited (system leavers)	89	121	32
Number of adults who exited with increased non-employment cash income	13	23	10
Percentage of adults who increased non-employment cash income	15%	19%	4%

Metric 4.6 – Change in total income for adult system leavers

	Submitted FY 2016	FY 2017	Difference
Universe: Number of adults who exited (system leavers)	89	121	32
Number of adults who exited with increased total income	35	50	15
Percentage of adults who increased total income	39%	41%	2%

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

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

	Submitted FY 2016	FY 2017	Difference
Universe: Person with entries into ES, SH or TH during the reporting period.	757	664	-93
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.	179	230	51
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)	578	434	-144

Metric 5.2 – Change in the number of persons entering ES, SH, TH, and PH projects with no prior enrollments in HMIS

	Submitted FY 2016	FY 2017	Difference
Universe: Person with entries into ES, SH, TH or PH during the reporting period.	1013	936	-77
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.	215	289	74
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.)	798	647	-151

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

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 FY2017 (Oct 1, 2016 - Sept 30, 2017) reporting period.

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

	Submitted FY 2016	FY 2017	Difference
Universe: Persons who exit Street Outreach	240	533	293
Of persons above, those who exited to temporary & some institutional destinations	142	219	77
Of the persons above, those who exited to permanent housing destinations	14	31	17
% Successful exits	65%	47%	-18%

Metric 7b.1 – Change in exits to permanent housing destinations

2018 HDX Competition Report

FY2017 - Performance Measurement Module (Sys PM)

	Submitted FY 2016	FY 2017	Difference
Universe: Persons in ES, SH, TH and PH-RRH who exited, plus persons in other PH projects who exited without moving into housing	954	706	-248
Of the persons above, those who exited to permanent housing destinations	586	419	-167
% Successful exits	61%	59%	-2%

Metric 7b.2 – Change in exit to or retention of permanent housing

	Submitted FY 2016	FY 2017	Difference
Universe: Persons in all PH projects except PH-RRH	142	202	60
Of persons above, those who remained in applicable PH projects and those who exited to permanent housing destinations	137	187	50
% Successful exits/retention	96%	93%	-3%

2018 HDX Competition Report

FY2017 - SysPM Data Quality

PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

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.

2018 HDX Competition Report

FY2017 - SysPM Data Quality

	All ES, SH				All TH				All PSH, OPH				All RRH				All Street Outreach			
	2013-2014	2014-2015	2015-2016	2016-2017	2013-2014	2014-2015	2015-2016	2016-2017	2013-2014	2014-2015	2015-2016	2016-2017	2013-2014	2014-2015	2015-2016	2016-2017	2013-2014	2014-2015	2015-2016	2016-2017
1. Number of non-DV Beds on HIC	165	169	169	153	212	235	157	110	209	215	206	249	38	269	291	249				
2. Number of HMIS Beds	150	155	155	153	210	235	157	110	205	215	206	249	38	269	227	249				
3. HMIS Participation Rate from HIC (%)	90.91	91.72	91.72	100.00	99.06	100.00	100.00	100.00	98.09	100.00	100.00	100.00	100.00	100.00	78.01	100.00				
4. Unduplicated Persons Served (HMIS)	988	864	864	727	172	243	191	134	170	187	188	218	719	1011	1017	990	43	26	390	558
5. Total Leavers (HMIS)	847	728	745	583	58	101	109	48	17	23	21	28	273	641	644	498	37	25	243	534
6. Destination of Don't Know, Refused, or Missing (HMIS)	185	356	128	84	14	48	11	0	2	2	0	0	46	229	33	21	9	8	70	256
7. Destination Error Rate (%)	21.84	48.90	17.18	14.41	24.14	47.52	10.09	0.00	11.76	8.70	0.00	0.00	16.85	35.73	5.12	4.22	24.32	32.00	28.81	47.94

2018 HDX Competition Report

Submission and Count Dates for PA-504 - Lower Merion, Norristown, Abington/Montgomery County CoC

Date of PIT Count

	Date	Received HUD Waiver
Date CoC Conducted 2018 PIT Count	1/31/2018	

Report Submission Date in HDX

	Submitted On	Met Deadline
2018 PIT Count Submittal Date	4/4/2018	Yes
2018 HIC Count Submittal Date	4/27/2018	Yes
2017 System PM Submittal Date	5/15/2018	Yes

9.2 Permanent Supportive Housing Order of Priority Policy

The PA-504 Continuum of Care and Your Way Home Montgomery County have adopted the recommended order of priority established in HUD Notice CPD 16-11 to ensure that those persons experiencing chronic homelessness with the longest histories residing in places not meant for human habitation, in emergency shelters, and in safe havens, and with the most severe service needs are given first priority in PSH beds dedicated or prioritized for occupants by persons experiencing chronic homelessness. A chronically homeless individual or head of household must meet the definition stated in the Definition of Chronically Homeless final rule:

(a) 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 (a)(i) continuously for at least 12 months or on at least four 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 (a)(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 an institutional care facility;

(b) 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 (a) of this definition, before entering the facility;

(c) 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 (a) or (b) of this definition (as described in Section I.D.2.(a) of this Notice), including a family whose composition has fluctuated while the head of household has been homeless.

Persons with severe service needs means an individual for whom at least one of the following is true:

- i. History of high utilization of crisis services, which include but are not limited to, emergency rooms, jails, and psychiatric facilities; and/or
- ii. Significant health or behavioral health challenges, substance use disorders, or functional impairments which require a significant level of support in order to maintain permanent housing.
- iii. For youth and victims of domestic violence, high risk of continued trauma or high risk of harm or exposure to very dangerous living situations.
- iv. When applicable CoCs and recipients of CoC Program-funded PSH may use an alternate criteria used by Medicaid departments to identify high-need, high cost beneficiaries.

Severe service needs as defined in paragraphs i-iv. are identified and verified through data-driven methods such as an administrative data match or through the use of the SPDAT or VI-SPDAT assessment tools and should be documented in a program participant’s case file. The determination must not be based on a specific diagnosis or disability type, but only on the severity of needs of the individual. The determination cannot be made based on any factors that would result in a violation of any nondiscrimination and equal opportunity requirements, see 24 C.F.R. § 5.105(a). Additional guidance on utilizing the SPDAT or VI-SPDAT assessment tool appears in the following sub-section.

Where there are no chronically homeless individuals and families within the PA-504 CoC, Your Way Home service providers and recipients of CoC Program-funded PSH are encouraged to follow the order of priority for non-prioritized, non-dedicated beds described below.

First Priority—Homeless Individuals and Families with a Disability with Long Periods of Episodic Homelessness and Severe Service Needs

An individual or family that is eligible for CoC Program-funded PSH who has experienced fewer than four occasions where they have been living or residing in a place not meant for human habitation, a safe haven, or in an emergency shelter but where the cumulative time homeless is at least 12 months and has been identified as having severe service needs.

Second Priority—Homeless Individuals and Families with a Disability with Severe Service Needs.

An individual or family that is eligible for CoC Program-funded PSH who is residing in a place not meant for human habitation, a safe haven, or in an emergency shelter and has been identified as having severe service needs. The length of time in which households have been homeless should also be considered when prioritizing households that meet this order of priority, but there is not a minimum length of time required.

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.

An individual or family that is eligible for CoC Program-funded PSH who is residing in a place not meant for human habitation, a safe haven, or an emergency shelter where the individual or family has not been identified as having severe service needs. The length of time in which households have been homeless should be considered when prioritizing households that meet this order of priority, but there is not a minimum length of time required.

Fourth Priority—Homeless Individuals and Families with a Disability Coming from Transitional Housing.

An individual or family that is eligible for CoC Program-funded PSH who is currently residing in a transitional housing project, where prior to residing in the transitional housing had lived in a place not meant for human habitation, in an emergency shelter, or safe haven. This priority also includes individuals and families residing in transitional housing who were fleeing or attempting to flee domestic violence, dating violence, sexual assault, or stalking and prior to residing in that transitional housing project even if they did not live in a place not meant for human habitation, an emergency shelter, or a safe haven prior to entry in the transitional housing.

Recipients of CoC Program-funded PSH should follow the order of priority above, as adopted by the PA-504 CoC, while also considering the goals and any identified target populations served by the project. For example, non-dedicated or non-prioritized CoC Program-funded PSH that is permitted to target youth experiencing homelessness should follow the order of priority under Section III.B.1. of this Notice, as adopted by the CoC, to the extent in which youth meet the stated criteria.

Recipients must exercise due diligence when conducting outreach and assessment to ensure that persons are prioritized for assistance based on their length of time homeless and the severity of their needs following the order of priority described in this Notice, and as adopted by the CoC. HUD recognizes that some persons—particularly those living on the streets or in places not meant for human habitation—might require significant engagement and contacts prior to their entering housing and recipients are not required to keep units vacant indefinitely while waiting for an identified eligible individual or family to accept an offer of PSH (see FAQ 1895). Recipients of CoC Program-funded PSH are encouraged to follow a Housing First approach to the maximum extent practicable. Street outreach providers should continue to make attempts to engage those persons that

have been resistant to accepting an offer of PSH and where the CoC has adopted these orders of priority into their written standards, these individuals and families must continue to be prioritized until they are housed.

2. Severity of Need and SPDAT or VI-SPDAT Assessment Score Guidelines.

Having a Severe Service Need is determined by a SPDAT or VI-SPDAT score indicative of PSH placement as follows:

	Single Household	Family Household
VI-SPDAT Score	8+	9+
Full SPDAT Score	35+	54+

The PA-504 CoC and Your Way Home service providers use VI-SPDAT/SPDAT scores to determine a household's acuity level (acuity is synonymous with vulnerability of severity of service need). These scores inform which housing strategy is most appropriate for the households – PSH, RRH, or light touch. Due to a lack of PSH beds, the PA-504 CoC and Your Way Home prioritize high acuity households for RRH. High acuity households that meet the eligibility requirements for PSH will be prioritized for PSH entry based on the Prioritization Advisory Team's recommendation; or when Rapid Re-Housing rental subsidy is within 6 months of expiring.

So, if more than one person is chronically homeless, and only one has a Severe Service Need, that person will be prioritized. However, if more than one Chronically Homeless person has a Severe Service Need, but only one is nearing the end of their PA-504 or Your Way Home RRH subsidy, then that person will be prioritized. Otherwise, the Chronically Homeless person with the longest cumulative time homeless would be prioritized. Likewise, if two or more people have been homeless for the same length of time, then the person with the highest acuity would be prioritized.

If there is no person in the entire PA-504 Your Way Home geographic area that qualifies as chronically homeless, or if no chronically homeless person is willing to engage in housing services at the time a bed becomes available, then the bed will be filled using the prioritization process described for PSH beds not designated for people who are chronically homeless.

3. Policy for programs with targeted service populations

Some programs may have agreed to serve specific sub-populations as part of their grant agreements. When filling beds, these programs will use the prioritization process described above for those candidates that first meet all of the requirements for the program.

9.3 Permanent Supportive Housing Priority List

People who are chronically homeless or who are high acuity with a disability can be added to the PSH Priority List.

Documentation of disabling condition and homeless status is required to be referred to the PSH List. Exceptions can be made by the PSH Prioritization Committee.

In general, it is the responsibility of YWH shelters, street outreach teams (including mobile crisis units), and Housing Resource Center staff to identify and refer persons to the PSH List. Any Your Way Home community partner may make a referral to the list.

The Prioritization Committee will generate an HMIS report of all chronically homeless persons at least monthly in order to ensure all chronically homeless persons are being referred to the PSH List.

PA-504 CoC Your Way Home Montgomery County Racial Equity Assessment

August 2018

Your Way Home is the public-private partnership that supports the PA-504 Continuum of Care (CoC) in Montgomery County, Pennsylvania. Since its inception in January 2014, Your Way Home has operated with the vision to make the experience of homelessness in the county rare, brief, and non-recurring.

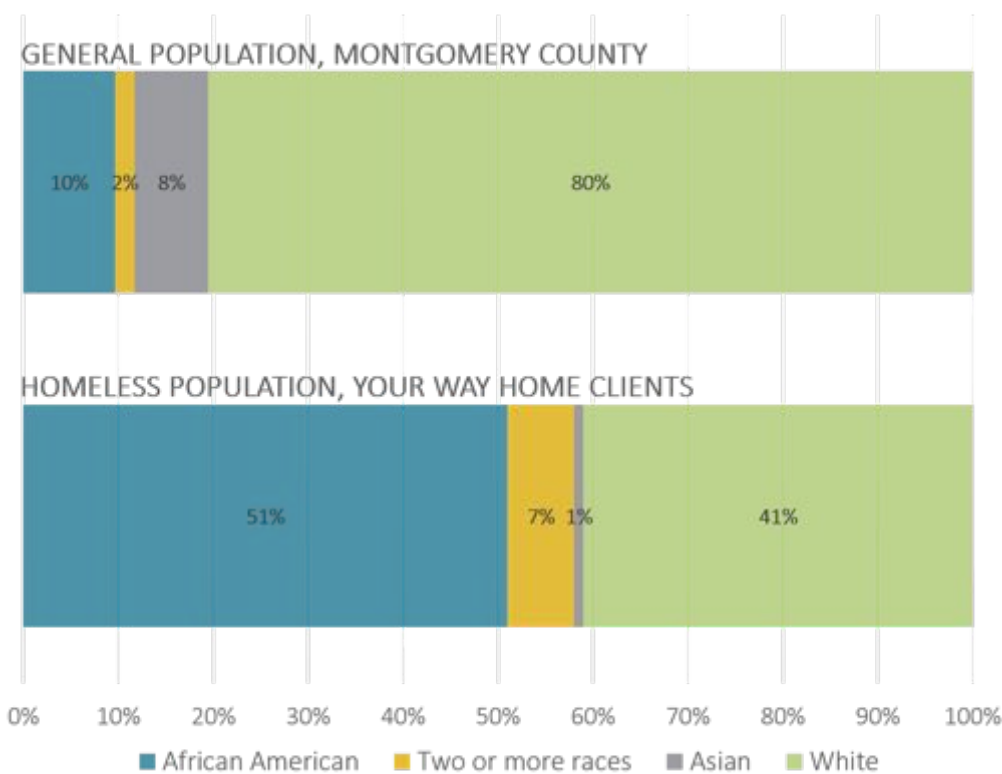
The following assessment provides a sample of the CoC's progress in identifying racial disparities in its efforts to end homelessness. Because issues related to race often intersect with those of ethnicity, gender, and age, data for these demographic categories has been included for comparative purposes.

DEMOGRAPHICS

Demographics (race, ethnicity, gender, and age tier) were calculated for 2014-2018 across all project types as well as individually for each: call center, street outreach (SO), emergency shelter (ES), transitional housing (TH), rapid re-housing (RRH), and permanent supportive housing (PSH).

Race

The racial demographic profile of the CoC's program participants does not match the general population of Montgomery County. **African Americans make up almost 10% of the CoC's geographic population, but comprise over half of the population experiencing homelessness.** Likewise, individuals who identify multiple races are over-represented in the population of individuals experiencing homelessness, and members of this subgroup are overwhelmingly black/African American and another race.



Racial Makeup of “Multiple Races” (Projects: SO, ES, TH, RRH, PSH)

Race	2016	2017	2018
Black/AA and White	98	100	81
Black/AA and American Indian/Alaskan	6	9	7
Black/AA, American Indian, and White	2	1	0
Black/AA and Asian	0	0	2
American Indian/Alaskan and White	3	3	2
Asian and White	2	4	1
Black/AA and Asian	1	1	0
Black/AA, Asian, and White	1	0	0
Asian and Native Hawaiian or Other PI	1	1	0
Black/AA and Native Hawaiian or Other PI	1	0	0
Total	115	119	93

Gender

Most demographic distributions are within expectations given the general population. Women (53.4%) are slightly overrepresented compared to men (46.6%). However, percentages for individuals identifying as transgender or Gender Non-Conforming were extremely low. The CoC found only 5 individuals in any of these categories in the 5-year review period.

Ethnicity

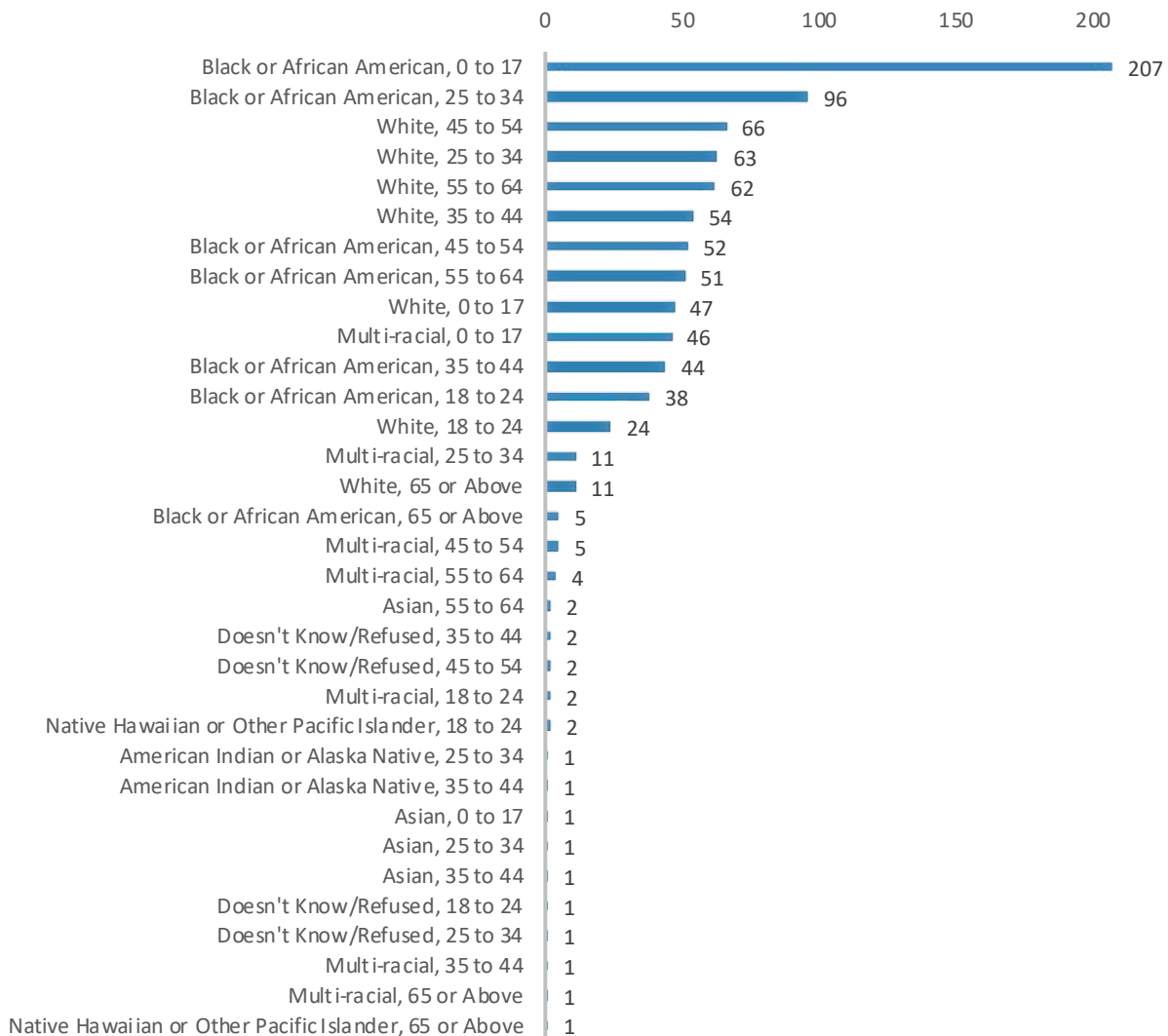
Percentages of individuals identifying as ethnically Hispanic/Latino/Latinx compare favorably to the general population of Montgomery County; however, these percentages have declined from 9.1% in 2014 to 5.9% in the first half of 2018. This is unlikely to match a true decrease in Latinx individuals experiencing homelessness, but may point to either a reluctance to identify Latinx ethnicity or a reluctance to engage with the homelessness system by this population.

Age and Race

Over a third of all individuals served by the CoC are children, which represents the single largest age category experiencing homelessness. This group is predominantly made up of **children under age 12, who account for 30% of all homeless residents** in any given year.

Of all children experiencing homelessness, two-thirds (66%) were black or African American. Black or African American children under age 18 represented a quarter of all individuals served by the CoC (24% in 2016 and 23% in 2017). Among all age-race groups (including adults), this is by far the most numerous group:

TOTAL HOMELESS BY AGE AND RACE, 2017



SYSTEM PERFORMANCE

The following represents a sample of metrics analyzed by the CoC to assess potential disparities. Whenever possible, the CoC compares all performance metrics by all demographic categories (race, ethnicity, gender, and age tier). These include utilization/enrollment rates by project type, exits to permanent housing, length of time homeless, length of stay in project before exiting to permanent housing, among others. In the future, the CoC expects to analyze returns to homelessness by demographic categories, but HMIS reporting limitations have hindered these efforts to date. The CoC recommends that federal policymakers and HMIS vendors implement demographic-based drilldown requirements into future editions of the System Performance Measures report, to aid in these efforts.

Street Outreach

The CoC calculates the number of days between street outreach enrollment and shelter entry. Based on initial analysis, the CoC does not seem to have significant issues among racial categories or other demographic groups in this area. Performance metrics included:

- **Enrollment Time:** the number of days between the most recent street outreach enrollment and the most recent shelter enrollment
- **Enrollment Rate:** the percentage of individuals who enrolled in street outreach and subsequently entered shelter

Almost all demographic subgroups tend to enroll in shelter within 25-28 days. Black or African American participants average slightly higher enrollment time, waiting 2 days longer than white participants to enroll in shelter. Participants who identify multiple races have an unusually high average enrollment time, at 39 days. The only category with a higher value was for participants aged 65+.

The **overall enrollment rate is about 33%.** One out of every three individuals open to Street Outreach later enrolls into one of the CoC's shelters. This may be a slight underestimate, as the analysis only examined the most recent Street Outreach enrollment.

Somewhat surprisingly, **enrollment rates for black or African American participants are higher than those for white participants (38% vs 29%).** The CoC will need to explore why enrollment rates are low for white participants; this may be related to intersection with another demographic variable.

Enrollment Rates and Enrollment Times

Race	Total	Not in ES	Percent Enrolled	Avg Days, SO to ES
Black or African American	411	255	38%	26.97
White	373	264	29%	24.97
Multi-racial	60	40	33%	39.05
(blank)	10	9	10%	6
Data Not Collected	9	9	0%	
Client doesn't Know	7	7	0%	
Client Refused	5	5	0%	
Asian	4	3	25%	6
American Indian or Alaska Native	2	1	50%	3
Native Hawaiian/Other Pacific Islander	1	1	0%	
Grand Total	882	594	33%	

The enrollment rate was much lower than average for participants of Latinx ethnicity (22%). Anecdotally, the street outreach team has reported an unwillingness among unsheltered Latinx individuals to enter the CoC's shelter system. This may be related to a lack of cultural competence among shelter staff, fear of having data recorded and shared, anxiety about contact with a "government" system, or other factors.

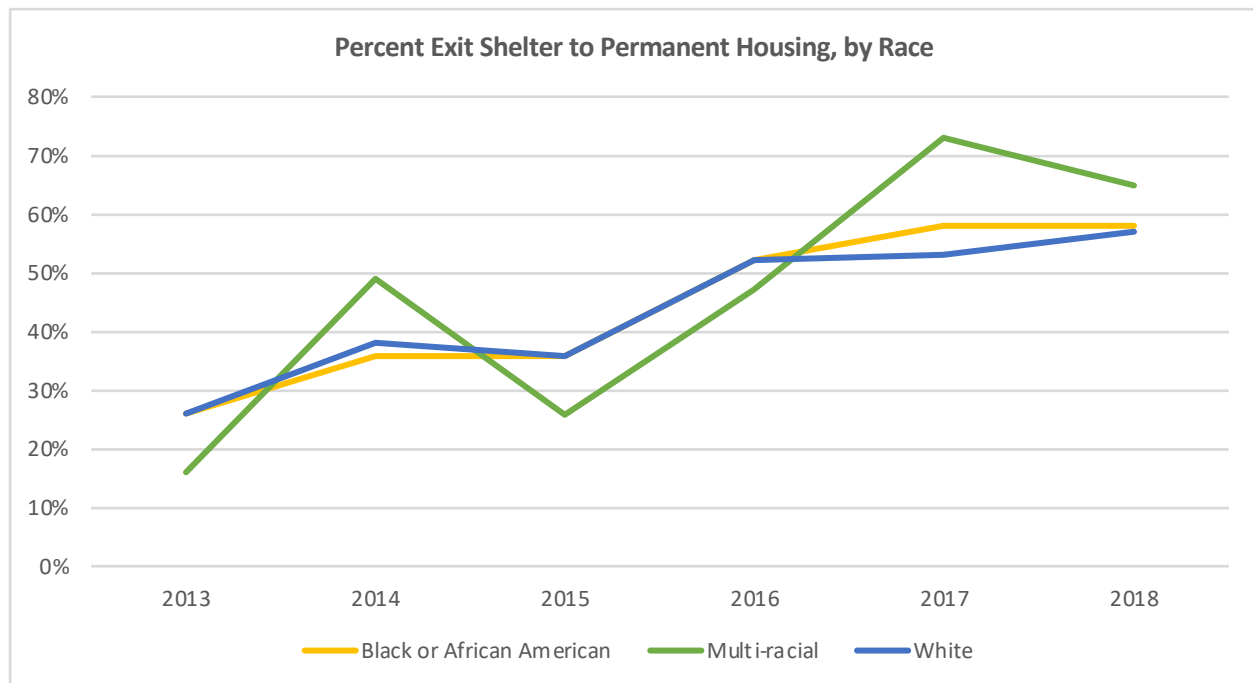
Ethnicity	Total	Not in ES	Percent Enrolled	Avg Days, SO to ES
Client doesn't know	4	4	0%	
Client refused	1	1	0%	
Data not collected	9	9	0%	
Hispanic/Latino	60	47	22%	27
Non-Hispanic/Non-Latino	802	527	34%	26.82
(blank)	6	6	0%	
Grand Total	882	594	33%	

Shelter Exit Rates to Permanent Housing

The CoC examined the percentage of exits to permanent housing for each racial group, and other demographic categories for comparison, from 2013 through 2018. Encouragingly, positive exit rates from shelter have gone up over the last five years, overall and generally among most demographic subpopulations.

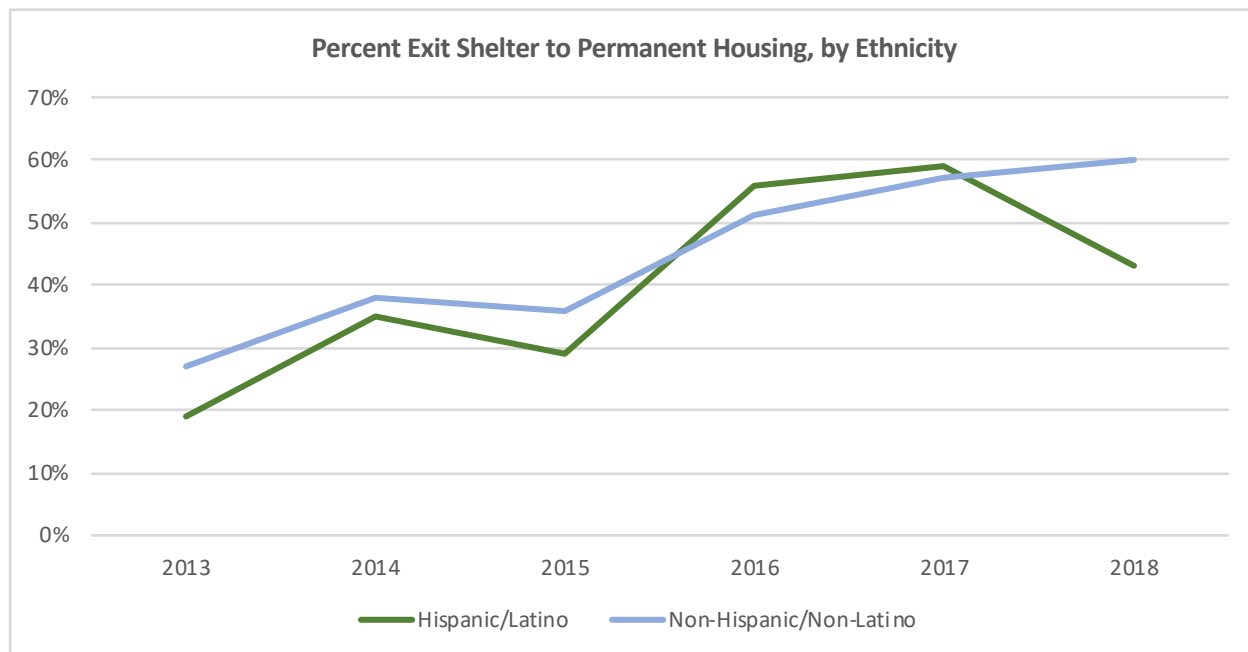
As most racial categories other than black and white tend to have very few members, these categories are highly susceptible to outliers. However, **exit rates to permanent housing for black and white clients are very close in every year analyzed**, so the CoC does not find racial inequity for this metric.

Individuals identifying multiple races have seen exit rates above and below the trend for black and white participants, depending on the year.



Latinx and non-Latinx percentages are also fairly close, with the exception of 2018. It is important to note this percentage drop may be affected by the small number of exits among those of Latinx ethnicity during

2018. **Latinx exit rates to compare favorably to exit rates for black and white participants** (again with the exception of 2018).



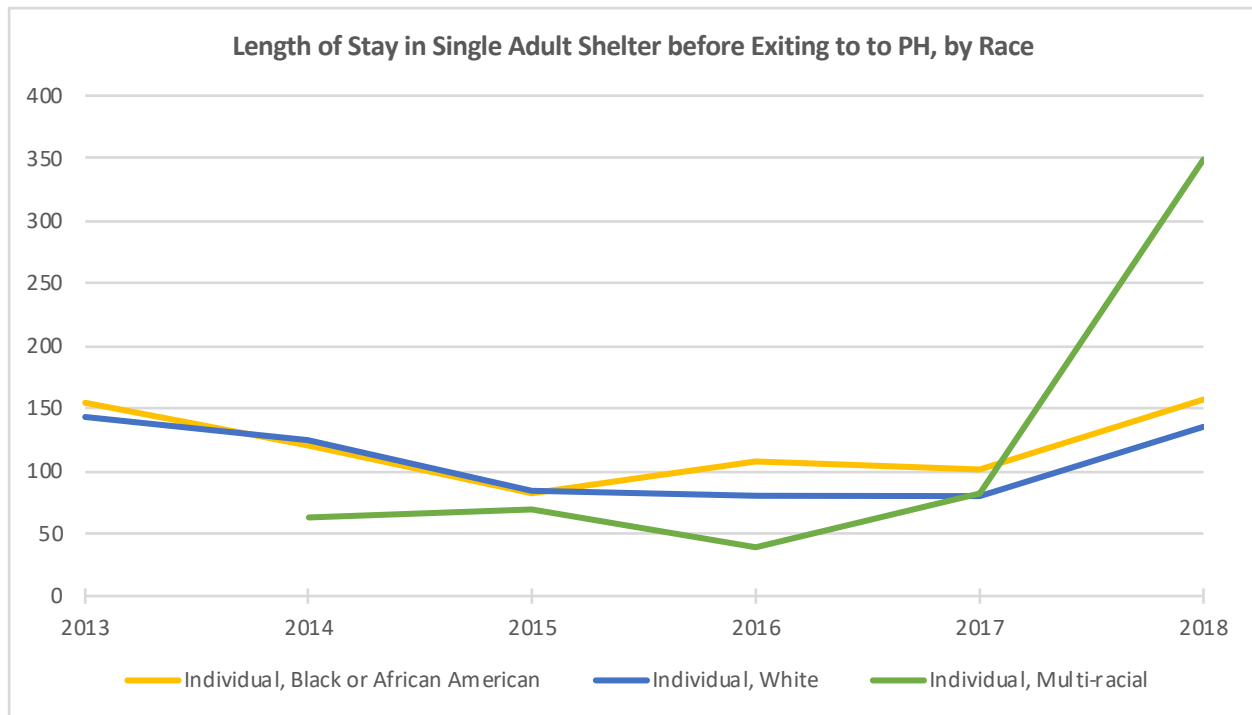
Length of Stay before Exiting to Permanent Housing

The CoC also examined average lengths of stay (LOS) in shelter before exiting to permanent housing. Family and single adult shelters are reported separately.

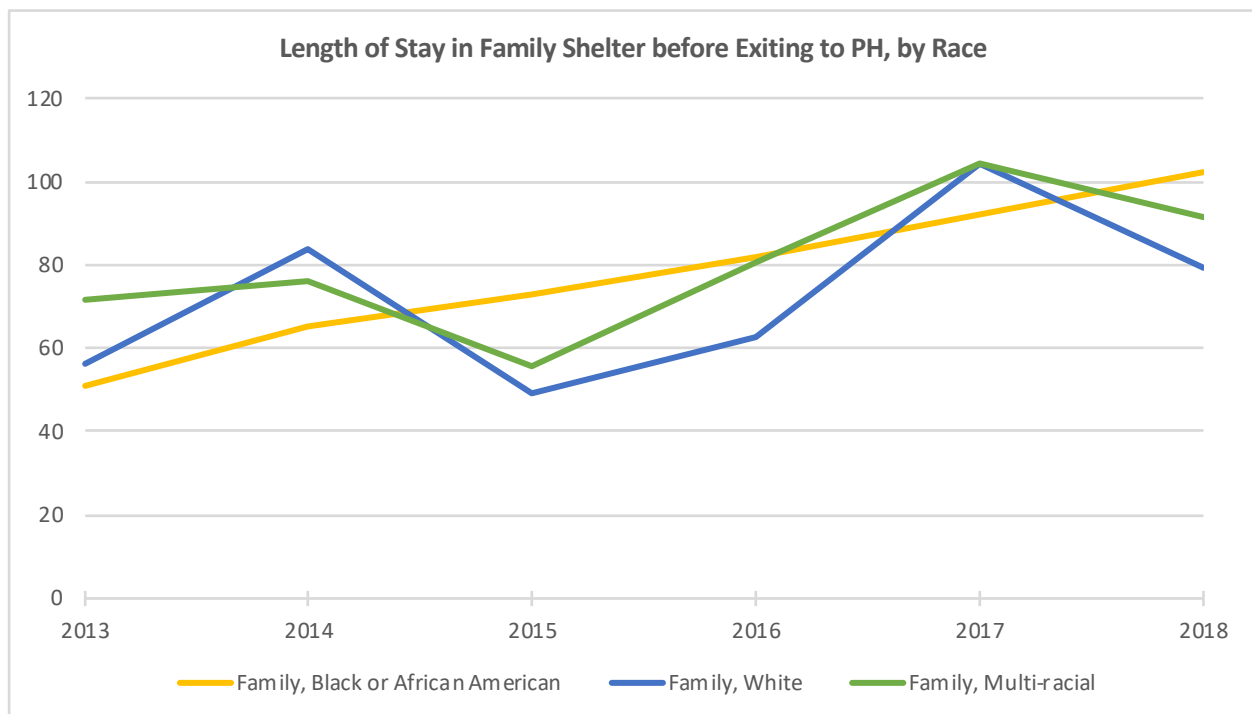
In general, **white clients tend to successfully exit shelter much faster than clients who are black or identified multiple races**. This is true for both single adult and family shelters, and is especially the case in 2018.

Because average/mean calculations are so susceptible to outliers, it is believed that the spike in LOS for individuals of multiple races in the first half of 2018 may be a statistical anomaly. This will need continued monitoring over the rest of the year.

For sake of clarity, and due to small numbers of individuals, other races were not included in the graphs for this metric. The CoC does not exclude any racial groups from its analyses of this or other metrics.



The length of time for African Americans in family shelters before exiting to permanent housing has been consistently increasing over the past 5 years. This is perhaps the clearest problematic pattern in the CoC's performance data uncovered to date:



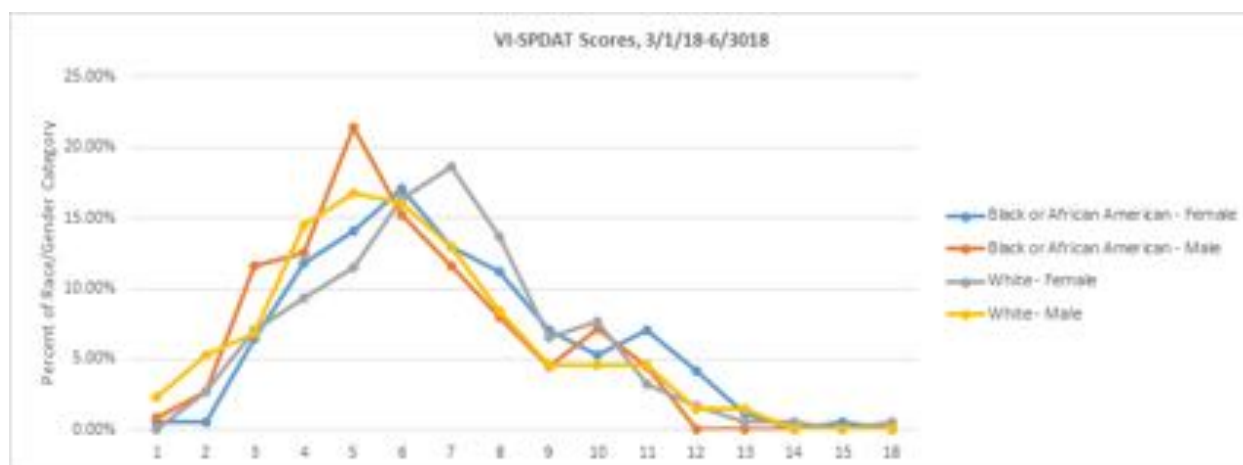
VI-SPDAT

Analysis of VI-SPDAT trends is very preliminary at this time. In very basic terms, when the bell curves overlap, the distribution of scores is equivalent. When they do not, particularly when the “peak” of one curve is farther to the right than another, this suggests one group is tending to score higher on average than other groups.

Women seem to score higher than men, but when race and gender are combined and adjusted for differences in population size, the score averages tend to overlap. This suggests that gender is an intervening variable for race on this metric, and a potential lack of racial inequity in the CoC’s assessment scores.



However, some divergence has become apparent when only focusing on the most recent four months of data for 2018 (March-June), in which **black or African American men start to have lower scores while white women have higher scores:**



These patterns may be statistical anomalies, or may point to an emerging trend. Further study is necessary before drawing conclusions.

NEXT STEPS

The CoC, with funding support from its Your Way Home philanthropic Funders Collaborative, has retained Jeff Olivet and the Center for Social Innovation (C4 Consulting) to conduct a comprehensive racial equity analysis of the CoC's policies, services, data, and leadership opportunities.

The C4 team has already held two site visits to conduct focus groups with program participants, interviews with program staff, and strategic planning sessions with the Equity Advisory Committee. Attachment 1 includes focus group/interview questions, while Attachment 2 includes a summary of each site visit's participants.

The CoC has provided HMIS data including but not limited to those discussed in this assessment, and the C4 team will provide further quantitative analysis in its Phase 1 report.

A report of initial Phase 1 findings will be shared with the CoC in October 2018, to be followed by the start of Phase 2 in early 2019.

Attachment 1: Center for Social Innovation Focus Group and Interview Questions

Focus Group Questions

A. Service Users

Participants are all people of color who have experienced or are currently experiencing homelessness. They may be recruited through posted flyers, street outreach, word-of-mouth, or through service providers. They should be as representative as possible of communities of color in each geographic area.

1. Given your knowledge of homelessness and homeless programs, who is at greatest risk for homelessness?
2. What is your current housing situation? Family?
3. Drawing on your experience, how does homelessness differ across racial/ethnic groups?
4. Data indicate that people of color are much more likely to become homeless. Why do you think that is? Why do you think White people are less likely to become homeless?
5. In your opinion, what are the main causes of homelessness? How do racism and discrimination contribute?
6. To the extent that you feel comfortable discussing this, has racial discrimination played a role in *your* experience of homelessness?
7. Our research project defines racism in two ways. First, we're referring to interactions where people make assumptions about others based on their race, or treat them differently because of it. Second, sometimes rules and policies can impact people of color and benefit White people. [Provide example if appropriate]. We can refer to these two forms as interpersonal racism and institutional racism. Does racism exist in homeless programs? What does it look like?
8. When you think of other disenfranchised groups, for example, people who identify as LGBT or have a disability, what barriers do they face related to homelessness?
9. Do you feel like you have a voice in shaping how programs are run?
10. Do you think it is possible to end homelessness? What would it take?
11. What advice do you have for Your Way Home as they try to address racism and other social injustices?

B. Service Providers

Participants are all people of color who are currently working in homeless service organizations. The groups should include people from all levels of provider organizations.

1. What were your pathways into this field? How did you come to work in the homelessness field?
2. Given your knowledge of homelessness and homeless programs, who is at greatest risk for homelessness?
3. Data indicate that people of color are much more likely to become homeless. Why do you think that is? Why do you think White people are less likely to become homeless?
4. Our research project defines racism in two ways. First, we're referring to interactions where people make assumptions about others based on their race, or treat them differently because of it. Second, sometimes rules and policies can impact people of color and benefit White people. [Provide example if appropriate]. We can refer to these two forms as interpersonal racism and institutional racism. Does racism exist in homeless programs? What does it look like?
5. In your opinion, what are the main causes of homelessness? Do you think that racism and discrimination contribute?
6. Do you see racial differences in the pathways into and out of homelessness for clients at your organization?
7. How can individual service providers combat racism?
8. Do you think it is possible to end homelessness? What would it take?
9. How can our country move towards ending racism and ending homelessness?

Attachment 2: Center for Social Innovation: Summary of Interview and Focus Group Participants

NOTE: All focus group participants were all clients of color experiencing homelessness, mostly staying in shelter. The 5 interviews were with staff of various racial/ethnic backgrounds, all providing direct services to program participants experiencing homelessness.

July Site Visit:

Service Provider Interview Session

- 1 Housing Locator, Carson Valley (*RRH and diversion provider*)
- 1 Drug and Alcohol Specialist, CHOC (*emergency shelter provider*)

Service User Listening Session at Salvation Army (shelter provider)

- 7 participants (2 males, 5 females)
- 2 Observers (females)

August Site Visit:

Service Provider Interview Session

- 1 Housing Resource Manager, Salvation Army (*shelter provider*)
- 1 Associate Director of Housing, Bucks and Montgomery County, Valley Youth House (*RRH provider*)
- 1 Assistant Director Street Outreach Services, Access (*street outreach provider*)

Service User Listening Session at Hospitality Center (day center)

- 8 participants (4 males, 4 females)