



# 2023 HUD CoC Competition Intent to Renew and Evaluation

---

## Instruction Guide

**Document Owner: Amanda Borta**

**3/15/2023**

For all HUD CoC-funded projects in the OR-500 Eugene/Springfield/Lane County Continuum of Care

## Table of Contents

Introduction .....	3
Evaluation Process .....	3
Deadline and Submission Instructions.....	5
<i>Helpful Tips</i> .....	5
Questions and Technical Assistance .....	6
Scoring and Ranking.....	6
Appeals.....	6
Detailed Instructions.....	7
<i>Intent to Renew – Project Information</i> .....	7
<i>Contact Information</i> .....	7
<i>Threshold Questions (Minimum Requirements)</i> .....	8
FY23 HUD CoC Evaluation .....	11
<i>Grant Expenditure</i> .....	11
<i>Homeless Management Information System (HMIS) and Data Quality</i> .....	11
<i>Housing First</i> .....	14
<i>Equity and Inclusion</i> .....	16
<i>Participant Focus</i> .....	17
<i>Project Performance Outcomes</i> .....	18
Certification and Submission .....	24
Evaluation Process and Scoring .....	24
Appendix A. Reporting Formulas .....	25
Appendix B. Narrative Question Rubric .....	28
Appendix C. List of Attachments.....	30

## Introduction

Annually, the US Department of Housing and Urban Development (HUD) provides funding for homeless programs authorized under the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act through a Continuum of Care (CoC) Notice of Funding Opportunity (NOFO) process. In order to be eligible for renewal funding, the Lane County CoC requires all projects to complete a local Evaluation to determine renewal status. **The Evaluation process ensures a high standard of quality for renewal applicants, and is also used to make ranking and funding decisions at the local level.** After the local application submission (Intent to Renew/Evaluation), eligible renewal applicants may be invited to submit a HUD application to the Collaborative Applicant (Lane County) once the NOFO is released. Lane County subrecipients will have the HUD application completed on their behalf.

**HUD, through the CoC Interim Rule (24 CFR Part 578), encourages CoCs to establish formal policies and review procedures to evaluate the effectiveness of projects, with particular emphasis on performance targets and outcomes measurement.** In Lane County, the Poverty and Homelessness Board (PHB) is responsible for setting local policies and priorities under direction of a Strategic Plan. The PHB has charged the CoC Committee with evaluation and ranking of the CoC funded projects. Lane County Human Services Division, as the Collaborative Applicant, executes the evaluation and application process for HUD CoC funding.

The purpose of this Evaluation is to:

- Secure additional, and ensure efficient use of current resources.
- Implement strategies outlined in the 2016-2021 PHB Strategic Plan.
- Improve the overall homeless system and service delivery outcomes.
- Establish and communicate local priorities for the purposes of ranking.

## Evaluation Process

The Evaluation must be submitted by all CoC funded projects, including those subcontracted through Lane County Human Services Division. CoC Planning and HMIS projects will be evaluated separately.

APPLICANT	SUBRECIPIENT	PROJECT	TYPE
LANE COUNTY	SHELTERCARE	CAMAS	PSH
LANE COUNTY	SHELTERCARE	CASCADES	RRH
LANE COUNTY	MAINSTREAM HOUSING	EMERALD	PSH
LANE COUNTY	SHELTERCARE, CCS, LOOKING GLASS	MCKENZIE	RRH
LANE COUNTY	SHELTERCARE	SAHALIE	PSH
LANE COUNTY	SHELTERCARE	SHANKLE (Sc.Sites)	PSH
LANE COUNTY	HOMES FOR GOOD	MLK	PSH
LANE COUNTY	LAUREL HILL CENTER	THE NEL	PSH
HOMES FOR GOOD	SHELTERCARE, LAUREL HILL CENTER	MADRONE/SPC	PSH
SVDP		CONNECTIONS	RRH
SVDP		LIFT	PSH
SVDP		VET LIFT	PSH

The Evaluation is updated each year to ensure it is in line with the HEARTH Act, current local and HUD priorities, and most up to date best practice guidance. Agencies should make efforts throughout the year to stay informed of both national and local policies and priorities to ensure compliance with requirements. The CoC recognizes that agencies will need reasonable time to come into compliance with any new expectations or requirements.

The 2023 Evaluation will consist of 6 sections (detailed below), for a total of **100 points possible**. All agencies receiving HUD CoC funding will need to submit an **Intent to Renew** form and completed **Evaluation** for each HUD CoC project (PSH, RRH) in order to be eligible to receive renewal funding.

**The Evaluation will consist of 6 Scored sections:**

<b>Grant Expenditure (10%):</b> Spend down/Recapture
<b>HMIS (10%):</b> Data Quality; Participation; Missing Data; Timeliness
<b>Equity and Inclusion (15%):</b> Assessing and addressing racial disparities; Staff training
<b>Participant Focus (15%):</b> Participant involvement in programming; feedback process; Client Rights
<b>Housing First (15%):</b> Housing First Assessment
<b>Project Performance (35%):</b> Unit Utilization; Exits to Permanent Housing; Increase in Income; Non-Cash Benefits; Retention in PH; Follow Ups; Cost Efficiency
<b>BONUS (not included in overall points possible):</b> Serving Chronically Homeless/Highest Vulnerability; Priority Populations or Focus Areas (Youth, High Vulnerability, FUSE)

All agencies receiving CoC funding will also be monitored by Lane County as the Collaborative Applicant for OR-500, which includes submission of a Monitoring Questionnaire, as well as either a desk review or site visit, dependent upon agency risk rating determination. While the CoC monitoring process will not impact Evaluation scoring, the Monitoring Questionnaire will be used as a companion document to the annual Evaluation process. Agencies should always be sure to complete the Monitoring Questionnaire by the stated deadlines in order to remain eligible for renewal funding.

**Failure to submit an Intent to Renew form or Evaluation by the stated deadline may result in a loss of funding.**

## Deadline and Submission Instructions

All Intent to Renew and Evaluation submissions are due to Lane County by **April 17<sup>th</sup>**. Agencies will be submitting the Intent to Renew form and Evaluation online via Cognito. Paper copies or submission through other methods will not be accepted.


### Intent to Renew and Evaluation Submission

The Intent to Renew form and Evaluation is located here:

<https://www.cognitofrms.com/LaneCounty1/HUDCoCIntentToRenewAndEvaluationFY23>

You will need to submit one form for **each** project that receives HUD CoC funding (listed on page 2).

### Helpful Tips

- **It is highly recommended that you only complete the online survey only once you have all of the necessary information and have all of the required documents ready to upload.** Some questions will be indicated with an asterisk (\*) next to the question. You will not be able to continue to the next page without answering these required questions. It is not recommended that you enter inaccurate or “placeholder” information in order to move to other sections of the survey. ***Please use the PDF version of the Evaluation to complete the responses outside of Cognito first.***
- Questions that require an attachment are identified in this guide with this symbol: . All attachments must be uploaded directly within the online survey. If you are having difficulty uploading a document, please first check to be sure you are uploading the correct file type (.pdf, .doc, etc.) indicated in the question. Next, be sure the file size is not too large. All files are limited to no more than 5MB. A pdf file should be a text file, rather than an *image* file, which significantly increases file size. If your file is over an indicated size limit, you may need to compress the file.
- Agencies will be able to save and return to complete the survey later (within 7 days only). However, as noted above, agencies are encouraged to have all responses ready prior to entering the online survey. Responses are saved only when you click Next, Back, or Submit, but may not save automatically as questions are answered if you do not progress through to the next page. **If you close out of the survey without saving or submit it, you will not be able to edit your responses and will need to start a new survey submission.**
- Program staff should work with their Agency Administrator to review the required reports and correct any data errors. Most of the questions within the Evaluation will be scored using data

from WellSky Community Services (formerly ServicePoint). It is recommended that staff review the reports as soon as possible and ensure corrections are made in advance of submission. **DO NOT WAIT UNTIL THE LAST MINUTE TO REVIEW YOUR REPORTS!** All scoring will be based on verified data from WellSky only.

## Questions and Technical Assistance

If you have any questions after reviewing the available resources, please contact Danielle Bautista at [Danielle.bautista@lanecountyor.gov](mailto:Danielle.bautista@lanecountyor.gov)

*Please consult with your Agency Administrator on any questions that require the use of WellSky data. If you have questions regarding reports, data quality, or WellSky, please contact the HMIS Helpdesk directly: [HSDhelpdesk@lanecountyor.gov](mailto:HSDhelpdesk@lanecountyor.gov)*



## Scoring and Ranking

All questions in the 2023 Evaluation will be scored as indicated. Questions are assigned a point value and will be scored utilizing the criteria noted. All projects are scored on each question, unless otherwise noted or specified. Informational questions are used only for informational purposes and will not contribute to the overall score. Projects will not lose points as a result of Bonus questions – these will be included only in points awarded, and not points possible.

After the submission deadline, Lane County staff will review available data and score each project based on the criteria outlined. Scores will be reviewed by the CoC Committee of the Poverty and Homelessness Board. The PHB, along with the CoC Committee, are responsible for establishing Ranking Policies upon the release of the NOFO. Evaluation scores are one factor that may be considered when determining Ranking Policies. The Committee may utilize other requested data or information. All agencies will be notified of their ranking and application status.

## Appeals

LC HSD staff, along with members of the CoC Committee, will review and score all Evaluations and provide a detailed preliminary score sheet for each project to the agency. Agencies are encouraged to contact LC HSD staff to receive clarity on any given score. Should the score be found to be inaccurate, based on the scoring criteria outlined, LC staff will adjust the scoring as appropriate and provide an updated score sheet to the agency. If the score is affirmed, but the agency would like to appeal based on other extenuating circumstances, they will have an opportunity to do so. The process for appeals will be communicated with preliminary scores. The CoC Committee will be responsible for reviewing and making a determination on all appeals. Once determinations have been made, final scorecards will be issued to the agency.

## Detailed Instructions

For 2023, Agencies will be required to complete the Intent to Renew form and full Evaluation to be submitted to Lane County via Cognito by no later than **April 17<sup>th</sup>**.

As mentioned, you should prepare all answers and documents prior to entering information into the online survey. While you will be able to save your responses, you will not be able to navigate from one section to another without answering required questions first. For a list of all required attachments, please see [List of Attachments](#). You may also view a PDF version of the Evaluation [here](#).

### *Intent to Renew – Project Information*

The first section contains general instructions and requests basic agency and project information.

**Agency Name:** Please list your full agency name as it appears on your Lane County contract or grant agreement with HUD.

**Agency Address:** Please indicate the main address for the *agency*. If there are multiple addresses, please use the main address, admin office, or address used for contracting purposes.

**Executive Director Information:** Please indicate the name, email, and phone number of the Executive Director (or otherwise known as CEO, Agency Director, etc.)

**HUD Project Name:** Indicate the project for which you are completing the survey. Please use the approved HUD project name listed on the grant agreement or contract.

**HUD Grant Number:** Indicate the FY22 or most recent HUD grant number for the project. If you are unsure of the grant number, you may find it [here](#) on the Grant Inventory Worksheet.

**Do other funding sources support this project:** Indicate Yes or No if you support this project with non-CoC funds. This includes funding used as match or leverage for the project. You will then be asked to identify the source for other funds that support the project. Select all that apply.

**HMIS Project ID(s):** Please indicate the project's HMIS Project ID(s). This is typically a four digit number used to identify the project in WellSky.

**Is the agency intending to renew the above CoC project through the upcoming CoC Competition:** This is where the agency is indicating whether or not there is intent to renew the project for the FY23 (HUD) year. If you indicate No, please provide an explanation. Note: If you indicate No to this question, you may not be eligible for continued funding beyond FY22 (HUD) grant year.

### *Contact Information*

**Primary Contact Information:** Provide the contact information (Name, Phone Number, Email) for the person who is responsible for submitting an evaluation for this project. This should be the person primarily contacted regarding this project during the operating year.

**Secondary Contact Information:** Provide the contact information for a second person who should be contacted regarding this project during the operating year.

**Other Contact Information (Optional):** If needed, you may provide contact information for a third person who should be contacted regarding this project during the operating year.



**Note:** The contacts listed in the Evaluation will be used to formulate a CoC project contact list for the upcoming year. Please list the most appropriate contacts for ongoing CoC communication.

### ***Threshold Questions (Minimum Requirements)***

The questions in the Intent to Renew form indicate minimum requirements for funding. These questions must be answered affirmatively, if applicable, in order to be considered eligible for renewal funding. **If an agency cannot answer affirmatively, an explanation must be submitted within the Intent to Renew Form for review by Lane County and the CoC Committee.** The reviewers may request additional information and will determine if the project is eligible for a waiver of the requirement for this competition period.

#### **Did you submit the most recent APR to HUD in Sage within 90 days of grant end date?**

The Annual Performance Report is required to be submitted in Sage to HUD within 90 days of grant end date. Lane County will confirm timely submission within Sage and retain a copy with the Evaluation submission. Agencies receiving funding through Lane County may check the box to indicate that the APR is submitted by Lane County HSD. If this is a new project, for which a full grant year has not yet been completed, choose N/A.

#### **Does the project participate in HMIS?**

Participation in the Homeless Management Information System (HMIS) is mandatory, as required by HUD. Participation is defined as entering all [required data elements](#) for all persons in the project. Participation will be verified by Lane County HMIS Lead staff. Projects are expected to enter all Universal Data Elements, as well as any applicable Program-Specific Data Elements. Projects that exclusively serve victims of domestic violence should select “No- DV Exclusive Project.” Projects exclusively serving a DV population are required to utilize a comparable database.

#### **Does this project participate in Coordinated Entry?**

Participation in the locally established Coordinated Entry process is mandatory, as required by HUD. Participation is defined as filling all bed and unit vacancies through the established Central Wait List (CWL). Projects should also make efforts to refer clients seeking assistance directly to appropriate access points (Front Door Assessors). Participation in the Coordinated Entry System will be verified by Lane County staff.

#### **Does the project serve families with at least one parent and one child (Informational)**

Indicate whether or not the project serves families with at least one adult and one child. If Yes, agency must complete additional subquestions a- c., which are Threshold questions for projects that serve families.

**If Yes, Answer the following questions:**



**a. Does the project accept all families with children 18 and under without regard to the age or gender of the child(ren)?**

HUD CoC projects are prohibited from involuntary family separation. The age and gender of a child under age 18 must not be used as a basis for denying any family's admission to a project that receives HUD CoC funding (24 CFR Part 578.93).

**b. Does the project have a staff person who has designated responsibility for ensuring that children are enrolled in school and are connected to appropriate services in the community?**

All projects serving families are required to certify that they will designate a staff person to be responsible for ensuring that children being served in the program are enrolled in school and connected to appropriate services in the community, including early childhood programs such as Head Start, part C of the Individuals with Disability Education Act, and programs authorized under subtitle B of title VII of the Act (24 CFR Part 578.23).

**c. Are the project policies and practices consistent with the laws related to providing education services to individuals and families?**

HUD CoC projects must establish policies and practices consistent with, and do not restrict, the exercise of rights provided by subtitle B of title VII of the Act and other laws relating to the provision of educational and related services to individuals and families experiencing homelessness (24 CFR Part 578.23).

**Is the project able to meet the match requirements upon execution of grant agreement?**

Recipients must match all grant funds, minus leasing, with *at least* 25% cash or in-kind contributions from other sources (24 CFR Part 578.73). Agencies are required to have written commitments of match for the project prior to executing the grant agreement. Agencies will be asked to submit letters of match commitments prior grant agreement.

**Is the project in compliance with the Final Rule on Equal Access?**

Indicate if your project has policies and procedures in place that are consistent with the requirements under the Equal Access in Accordance with Gender Identity Final Rule. In September 2016, HUD published a final rule entitled "Equal Access in Accordance with an Individual's Gender Identity" in Community Planning and Development Programs. Through this rule, HUD ensures equal access to individuals in programs funded under the HUD Office of CPD. More information about the requirements under this rule can be found [here](#).

**Is the project in compliance with the Final Rule on the Violence Against Women Act (VAWA)?**

Indicate if your project has policies and procedures in place that are consistent with the requirements under the Final Rule Implementing VAWA Reauthorization Act of 2013. In November 2016, HUD published the final rule regarding implementation of the housing protections authorized through VAWA. More information about the requirements under this rule can be found [here](#).

**Has the project resolved all monitoring findings or concerns from HUD and/or Lane County?**


Indicate if your project has resolved any monitoring findings received from either HUD or Lane County. If the project has not received any monitoring findings, please select “This project has not received any monitoring findings.” If the project has received monitoring findings, but has not yet resolved one or more findings, please submit an explanation outlining the finding(s) and what steps are currently being taken to address or resolve the issue, including estimated timeline for resolution if possible.

**Does the agency have at least one currently or formerly homeless individual on the Board of Directors?**

Indicate if your agency currently has at least one board member who is currently experiencing homelessness or who was formerly homeless. If the agency does not currently have a board member who meets this requirement, please submit an explanation outlining the steps the agency will take to ensure this seat is filled and the timeline for meeting the requirement. This requirement can be found at 24 CFR 578.75(g).

## FY23 HUD CoC Evaluation

### Grant Expenditure

 **Was the project able to fully expend 100% of the funds initially contracted (through HUD or LC HSD) for this project for the grant term which most recently ended?**


The expectation is that agencies expend 100% of funds provided in their HUD contract. Projects will be scored based on information in Sage Reporting System or Lane County Invoices for the *most recently ended HUD grant period* and initial contract amount (full contract), even if funds were reallocated to another subrecipient (Lane County) within the grant period.

If 100% of funds were not spent by the grant end date, Lane County will review the amount that was left unspent (including funds that were moved from your agency prior to grant end date) and calculate a score based on the criteria noted. The agency must also complete and submit the [Recapture Spreadsheet](#). Instructions for completing the Recapture Spreadsheet are included within the document.

**Reallocation:** If an agency has consistently left funds unspent over the previous three grant periods, CoC staff will review whether a recommendation should be made to reallocate any amount back to the Continuum for use in other new or renewal CoC projects. This recommendation will be brought to the CoC Committee.

### Homeless Management Information System (HMIS) and Data Quality

*Please consult with your Agency Administrator on any questions that require the use of WellSky data. If you have questions regarding reports, data quality, or WellSky, please contact the HMIS Helpdesk directly: [HSDhelpdesk@lanecountyor.gov](mailto:HSDhelpdesk@lanecountyor.gov)*

 Reports you will need:

- CoC APR (Canned Report)
  - Provider: Your project name
  - Program Date Range: 1/1/2022-12/31/2022
  - Entry Exit Type: select **only** your entry type, do not select all types.
- DQ for PLUS Entry Assessments (found in CoC folder → Evaluation Reports sub-folder or Data Quality folder in ART)
  - Provider(s): Your project name
  - Enter Start Date: 1/1/2022
  - Enter End Date PLUS 1 Day: 1/1/2023
  - Include Services in Report Card? No
- CoC Project Evaluation (found in CoC folder → Evaluation Reports sub-folder in ART)

- Provider: Your project name
- Start Date: 1/1/2022
- End Date PLUS one day: 1/1/2023

Note: Making corrections can change data in some of the reports. It is best to run the APR **first** and make corrections. **Then after ART has refreshed (usually between 1-2pm daily and midnight each night), check the ART reports.**

**Has your agency administrator(s) attended Agency Admin meetings in the past calendar year?**

Agency Administrator meetings are held regularly. All Agency Admins are encouraged to attend all meetings. A record of attendance is held on file at Lane County (HMIS Lead). Agencies will receive two points for attending at least three meetings in 2022.



**Does the project have a data completeness score (A or A+) that reflects 5% or less missing values on all HUD required Universal Data Elements and Program Specific Data Elements in HMIS for the reporting period of January 1, 2022 - December 31, 2022?**

Agencies will receive full points if they have 5% or less missing values (An “A” grade) on all HUD required UDEs and PSDEs for the reporting period.

Run the **DQ for UDE PLUS** report. The completeness grade can be found on the first tab of the report. Points are awarded based on the Overall score.

	HUD UDE ONLY	Additional ONLY	HUD Verification ONLY	OVERALL
<b>GRADE BASED ON COUNT FOR EACH ELEMENT:</b>	<b>A</b>	<b>A</b>	<b>A</b>	<b>A</b>
	100.00%	100.00%	98.98%	99.84%



**What data entry timeliness grade has the project achieved in calendar year 2022 (January 1, 2022 - December 31, 2022)?**

Data timeliness reports on the amount of time it took to enter entry and exit records into the database. Agencies will be scored on the project’s data entry timeliness grade achieved for the reporting period.

**Run the CoC Project Evaluation report.** The score is the cell in green on the first tab of the report (Timeliness).

What data entry timeliness grade has the project achieved in the calendar year?

Score your data timeliness using the Average Total Points score below.

2 = A

1 = B

0 = C or below

Time For Record Entry and Exit	Number of Project Start Records	Number of Project Exit Records	Total Points
0-3 days (2 pts)	8	5	26
4 - 6 days (1 pts)	0	1	1
7+ days (0 pts)	2	1	0
<b>TOTAL Points</b>			<b>27</b>
<b>Total Entries and Exits</b>	<b>10</b>	<b>7</b>	<b>17</b>
<b>Average Points</b>			<b>2</b>


 **Has the project completed and entered all required interim/annual reviews into WellSky?**

Agencies are required to conduct an annual assessment, entered into WellSky within 30 days of the anniversary of the person’s project entry date.

Go to the **Annuals Due** tab of the CoC Project Evaluation report

The % of required annuals that were completed will be at the bottom of the page.

	8/13/21		506	8/13/22
	12/6/21		391	
40				31
			<b>% Complete:</b>	<b>77.50%</b>

 **Has the project completed and entered all required interim/annual reviews for the same calendar month as the head of household’s entry assessment?**

Agencies are required to conduct an annual assessment, dated the same month as the head of household’s entry assessment.

Run the **CoC Project Evaluation report** and look at the **Annual Dates** tab. The % of annual reviews dated correctly will be in green.

Entry Exit Entry Date	Entry Exit Review Date	Month of Entry matches Month of Annual	Housing Move-in Date(9/160)	Housed YN (Review)
1/16/20	1/16/21	Yes	4/9/20	Housed
6/3/19	6/3/21	Yes	7/1/19	Housed
7/24/20	7/24/21	Yes	9/3/20	Housed
10/14/19	10/14/21	Yes	2/21/20	Housed
		4		
	Average	100.00%		

Note: if you will be making corrections in this section, you may need to re-enter data. If the annual contained new information and you will be altering the date to a **later** date, no additional data entry is needed. If the annual date is being modified to an **earlier** date, you will lose the data that was entered on the original annual and will need to enter it again.

## *Housing First*

### **Does the project follow a Housing First approach, according to HUD guidelines?**

Housing First is an approach to quickly connect individuals and families experiencing homelessness to permanent housing options without preconditions and barriers to entry that has been proven to be very effective in ending homelessness. Housing First <sup>1</sup> is based on the principles that homelessness is a housing issue, all people experiencing homelessness can achieve housing stability in permanent housing, everyone is “housing ready” and that people experiencing homelessness have a right to self-determination. **All RRH and PSH projects are required to follow a Housing First approach.**

Agencies must answer each part to the question affirmatively in order to be considered fully in alignment with Housing First.

#### **1a. Does the project quickly move participants into permanent housing (without preconditions or extra steps required to be met)?**

The project must quickly move participants into permanent housing, meaning there are no intermediary steps or a period of qualification before permanent housing (e.g. completion of renter’s education, successful completion of or “graduation” from other temporary housing program, etc.).

#### **1b. Is the project able to answer affirmatively to all of the following statements**

The project must have also **removed barriers** to accessing housing and services and must be able to answer affirmatively to **all** of the following:

- This project does not screen out for reasons related to income (having too little or no income)


<sup>1</sup> <https://www.hudexchange.info/resources/documents/Housing-First-Permanent-Supportive-Housing-Brief.pdf>

- This project does not screen out based on active or history of substance use (including requirements for participation in treatment prior to or upon enrollment, sobriety, or intention to become/remain sober.)
- This project does not screen out for having a criminal record of any kind, including previous sex offense, drug related criminal activity, or violent crime (with exceptions only for state-mandated restrictions – note you must indicate what the exception is and what the corresponding state mandate is in order to receive points)
- This project does not screen out for the household having a history of domestic violence
- This project does not screen out based on an individual’s “housing readiness” or “motivation to change” or any other similar criteria
- This project does not screen out based on previous rental history (including eviction history, damage history, etc.)

**1c. Is the project able to answer affirmatively that none of the following are reasons for program termination:**

- Failure to participate in supportive services
- Failure to make progress on a service plan
- Loss of income or failure to improve income
- Domestic violence
- **Any other activity** not covered in a lease agreement typically found in the project’s geographic area.

The project must have removed unnecessary reasons for program termination including failure to participate in services, failure to make progress on service plan, loss of income or failure to increase income, domestic violence, or any other activity not covered in a typical lease agreement.

 **1d. Does the project provide and explain the written eligibility criteria which are in alignment with Housing First principles to participants?**

Agencies should have written eligibility criteria for the project, which are in alignment with Housing First principles. If the project has written eligibility criteria which are not in alignment with Housing First principles (i.e. in order to be eligible you must have income or must complete a program, etc.) zero points will be awarded for this element. The project’s written eligibility criteria should be submitted with the Evaluation. Word or PDF files accepted.

 **1e. Do the project’s written discharge or termination policies include all of the following:**

- Policy clearly stating what specifically would result in a participant’s termination from the project.
- An internal, due process hearing or investigation prior to terminating assistance
- Assistance with locating other housing options, if needed, upon discharge

A statement that the agency will make and document all reasonable attempts to avoid discharging participants into a homeless situation or without basic needed services

- A policy allowing participants to remain in the project even if they require an absence of 90 days or less due to substance use or mental health treatment, hospitalization, or incarceration

Agencies should have written discharge or termination policies. The written discharge policies should clearly include all items listed above. If the written termination policies do not include all of the above, or are otherwise unclear within the document, zero points will be awarded for this element. The termination policies should be included with the Evaluation. Word or PDF files accepted.

Projects able to answer affirmatively to all of the criteria will receive the full 15 points. If a project cannot answer affirmatively for any piece, **points will be deducted for that element.** The project's written eligibility criteria and discharge or termination policies submitted with the Evaluation must support responses to this question. If written policies indicate contradictory information to the responses provided, no points will be awarded for the corresponding element.

### *Equity and Inclusion*

**Indicate the steps and methods used to address equity within the agency.**

All agencies should work to analyze and address equity issues within the agency and programming. To approach this comprehensively, agencies should work to:

- Make a formal commitment to address inequities
- Complete a racial disparities assessment
- Develop a racial equity plan based on the assessment completed, to address disparities
- Incorporate ongoing evaluation of progress toward racial equity
- Implement internal structures to ensure responsibilities for ongoing equity work are clear
- Include racial equity pieces into staff job descriptions and work plans
- Ensure staff are thoroughly trained in equity and institutional racism and understand their role in addressing disparities
- Consistently apply a racial equity lens throughout the agency's work

Complete the chart to reflect the steps and methods the agency has utilized. Agencies will receive a point for each element that is indicated and supported with additional evidence or documentation. If the attached documents are not sufficient in providing evidence, points will not be awarded for that item. If the agency has not yet incorporated all steps, it is recommended to take action prior to the next renewal Evaluation and work to achieve full compliance.

**Provide additional narrative detailing the project's strategies for addressing racial disparities within programming, outcomes, or access, and any significant successes and challenges that the project experienced in this work over the past year. What has the agency done to effectively address challenges?**



Agencies must respond with a detailed narrative that describes the specific strategies used to identify and address racial disparities in programming implementation, outcomes, or access to services. The response should also include successes and challenges in this work over the past year, as well as what the agency has done to address the challenges. The responses will be scored utilizing the rubric outlined in Appendix B.

**Please describe the training and support staff receive related to racial equity, DEI, and cultural competency. Include detail regarding the topics of training, how many staff attended in the past year, and how frequently training is offered and completed.**


Agencies must respond with a detailed narrative that describes how staff are trained in cultural competence, racial equity, and diversity, equity, & inclusion. The response should include detail of the specific topics of training related to these areas, which staff/how many attended in the past year, and how frequently training is offered or expected to be completed in these areas. Please be specific. The responses will be scored utilizing the rubric outlined in Appendix B.

### *Participant Focus*

**In what ways does the project provide opportunities for participants to contribute directly to the day-to-day operations or programming beyond typical feedback processes?**

Agencies should provide ways for participants to contribute to the operations of the agency or program. Check the available option(s) if the agency has encouraged the participants to contribute through weekly meetings, resident councils, on-site employment opportunities, volunteer opportunities, peer leadership opportunities, or focus groups. If the agency provides other methods for participants to contribute, select Other and a write-in response. A point can be received for each opportunity the agency provides, up to 6 points possible.

Please note: Participation on the Board of Directors is required of all agencies and does not count toward this contribution. Feedback processes/anonymously surveying also do not count toward this contribution, as this is considered a minimum expectation of any project.

 **Does the agency have a written notice or “Client Rights” document that is posted and provided to participants which, at a minimum, addresses and clearly describes all of the following items.**

In order to receive points, the Client Rights document must be posted and provided to participants, and must clearly and specifically include all of the listed items (confidentiality policy, non-discriminatory practices, right to self-determination, right to refuse service, and grievance policy). The Client Rights document should be attached with the Evaluation. It should be clearly evident that the document is one provided to clients directly (i.e. does not appear as internal policy/procedures for staff).

## Does the agency regularly receive and respond to feedback from participants?

Indicate if your agency conducts at least annual satisfaction surveys or obtains feedback through anonymous feedback methods or another method.

To receive full points for this question, the agency must provide a narrative outlining at least one recent (in the past year) issue or opportunity for improvement that arose from feedback, how the agency responded to the issue, AND how this response was communicated back to participants. Response should be specific to this project, rather than the agency as a whole, or otherwise received from a participant of this project. A narrative not including all three elements will receive zero points. Agencies will be scored using the rubric provided in Appendix B. Responses should be recent (within the past year) and should not repeat issues that have been noted in previous Evaluations.

### Project Performance Outcomes

Please consult with your Agency Administrator on any questions that require the use of WellSky data. If you have questions regarding reports, data quality, or WellSky, please contact the HMIS Helpdesk directly: [HSDhelpdesk@lanecountyor.gov](mailto:HSDhelpdesk@lanecountyor.gov)

The Reporting Formulas document provides further detail on how each performance measure is calculated.

Select either Permanent Supportive Housing or Rapid Re-housing. All questions apply to all project types.




### Is the project at or above 80% utilization for the previous calendar year?

Utilization is reported within WellSky based on bed inventory (number of beds at full capacity) and persons entered into the project at four points in time throughout the calendar year. See [Reporting Formulas](#) for detailed calculation formula. Projects are expected to be at or above 80% utilization for the average bed utilization rate AND each of the four point in time bed utilization rates (January, April, July, October), based on full capacity within your grant agreement. For projects that serve families, utilization will be determined based on bed and unit capacity, due to fluctuating family sizes. For RRH projects, utilization will be determined based on the bed/unit capacity noted in the grant agreement. Project should ensure the appropriate bed and unit information is entered with WellSky.

To verify 80% utilization, run the **APR** and look at Section 7b. This gives the total number of clients enrolled for the PIT of each quarter. Divide each quarter's numbers by the project capacity to determine whether 80% utilization was reached.

7b - Point-in-Time Count of Persons on the Last Wednesday					
	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
January	57	0	57	0	0
April	41	0	41	0	0
July	51	0	51	0	0
October	37	0	37	0	0

If the project is not at or above 80% utilization for average or any of the four points in time, no points will be awarded (previously a Threshold question). Projects continuously below 80% utilization multiple years in a row may be considered for reallocation.

 **Of the individuals who were housed through the program within the reporting period (move-in date), what percentage were housed within 90 days of entry?**

Run the **CoC Project Evaluation** report and look at the **Performance: Move-in** tab. The % of clients housed is highlighted in green.

Number of days between Entry (Start) date and Move-in Date. This question is for RRH and PSH projects only. Note: look at the Annual Dates tab for client-level information about who has a Move-in Date recorded.

Days from Entry to Housing (1)	Clients
0-90	5
>90	
Total Number of Households with a Move-in Date	5
% Clients housed within 90 days of program entry	100.00%


Projects with no individuals placed into housing within the reporting period of CY22 will not be scored on this question.

 **Of the individuals who left the project (leavers), what percentage exited to a permanent destination?**

Run the **APR** and look at Section 23c. The percentage of positive destinations is listed at the bottom of this section.

<b>Total</b>	<b>74</b>	<b>0</b>	<b>74</b>	<b>0</b>	<b>0</b>
Total persons exiting to positive housing destinations	69	0	69	0	0
Total persons whose destinations excluded them from the calculation	0	0	0	0	0
Percentage	93%	0%	93%	0%	0%
<b>25a - Number of Veterans</b>					


Projects with no leavers in the reporting period will not be scored on this measure.

 **For those who did not have non-cash benefits at entry, what percentage of adults and heads of household obtained non-cash benefits through mainstream resources either at time of exit or annual assessment?**

Run the **CoC Project Evaluation** report and look at the **Performance: Non-Cash** tab. The % of clients who did not have non-cash benefits at entry and obtained them is highlighted in green.

**What percentage of adults and heads of household, who did not have non-cash benefits at entry, obtained non-cash benefits? (Counting adults and HoHs in households where HoH was in the project at least 365 days or exited during the report period.)**

Obtained Non-Cash Benefits?	
No	5
Adults and HoHs without non-cash benefits at entry	5
<b>% Adults obtaining non-cash benefits</b>	<b>0.00%</b>

 **What percentage of adults increased or obtained cash benefits or income from any source either at time of exit or at annual assessment?**

	Adults & HoHs
At Annual Assessment: # of Zero at Entry who now have NCB	
Zero NCB at Project Entry (at Start) who had Annual Assessment	
Percent who had a NCB at Annual Assessment (ZERO at entry)	

Run the **CoC Project Evaluation** report and look at the **Performance: Income** tab. The % of clients who did not have non-cash benefits at entry and obtained them is highlighted in green.

**What percentage of adults increased their income through cash benefits, earned income, or both? (Counting adults in the project at least 365 days or who exited during the report period.)**

Income change category	Clients
Increased	20
Maintained	12
Decreased	3
0 Income	22
# of Clients with income evaluated	57
<b>% Adults increasing income</b>	<b>35.71%</b>

Note: This question previously reviewed *maintenance* of income, but will now only review increases in income during the reporting period.

**What is the program’s cost per permanent exit (cost effectiveness)?**

		Adults & HoHs
	Retained Income Category and Increased \$ at Annual Assessment/Exit	
+	Performance Measure: Adults who Gained or Increased Income from Start to Annual Assessment/Exit, Average Gain	
/	Total Adults (including those with No Income)	
=	Percent who had a NCB at Annual Assessment (ZERO at entry)	

This question is informational and will not be scored. PSH or RRH projects can calculate the cost effectiveness by dividing the total project cost by the number of people of remain permanently housed for 12 months or more, plus leavers who exit to a permanent destination. Projects can find the number of stayer 12 months or longer, and the number of leavers, in the CoC APR.

Run the APR and look at Sections 5a and 23c. Add the number of Stayers (line 8 in 5a) to the total number of positive exits (found at the very bottom of 23c).

5a - Report Validations Table	
Report Validations Table	
1. Total Number of Persons Served	136
2. Number of Adults (age 18 or over)	57
3. Number of Children (under age 18)	79
4. Number of Persons with Unknown Age	0
5. Number of Leavers	74
6. Number of Adult Leavers	33
7. Number of Adult and Head of Household Leavers	33
8. Number of Stayers	62

**PLUS**

<b>Total</b>	74	0	74	0	0
Total persons exiting to positive housing destinations	69	0	69	0	0
Total persons whose destinations excluded them from the calculation	0	0	0	0	0
Percentage	93%	0%	93%	0%	0%

25a - Number of Veterans

Divide your project cost by this total.

**Bonus**

The following questions are intended to provide additional points to projects in order to offset performance or costs for projects serving highly vulnerable populations. These questions will not count toward the project’s overall points possible, meaning a **project may only gain points** and will not lose

points for not meeting the criteria outlined for each. With this method, it is possible that a project scoring on all other items would receive a total score of over 100%.

**Does the project serve individuals that meet HUD’s definition of chronically homeless?**

The Lane County CoC continues to prioritize projects serving households who are most vulnerable, particularly those who are experiencing chronic homelessness. Lane County will review the total number of households served from January 1, 2022 – December 31, 2022 who met [HUD’s definition of chronic homelessness](#). Projects serving over 75% households with at least one individual who is chronically homeless will receive bonus points.

Run the **APR** and look at Section 26a. Divide the Total Chronically Homeless by the Total in this section.

26a - Chronic Homeless Status - Number of Households w/at least one or more CH person					
	Total	Without Children	With Children and Adults	With Only Children	Unknown Household Type
Chronically Homeless	12	0	12	0	0
Not Chronically Homeless	28	0	28	0	0
Client Doesn't Know/Client Refused	0	0	0	0	0
Data Not Collected	0	0	0	0	0
<b>Total</b>	<b>40</b>	<b>0</b>	<b>40</b>	<b>0</b>	<b>0</b>

**Does the project serve individuals or families that meet the specialized population criteria below?**

The Lane County CoC continues to prioritize projects serving households meeting specialized population criteria including youth, highly vulnerable, and frequent users of systems (FUSE). Lane County will review the populations served using the **CoC Project Evaluation Report**, which will indicate the total number of households (Head of Household) served from January 1, 2022 – December 31, 2022 who met each of the population criteria. Projects serving over 75% households identified as specialized population will receive bonus points.

Run the **CoC Project Evaluation** report and look at the **Specialized Population** tab. The % of clients from each priority population are highlighted in green.

Youth head of household (under 25 years old)

AGE 24 GROUP Exit (EE)	HoH
ADULT 25+	11
All Heads of Household	11
<b>% Youth head of household (under 25 years old)</b>	<b>0.00%</b>

Highly vulnerable (VI-SPDAT score 15 and above)

SDPAT SCORE GRP	HoH
0-14	1
>=15	10
<b>% of HoH with VI-SPDAT Score 15 and above</b>	<b>90.91%</b>

Frequent Users System Engagement (FUSE)

All Head of Household Clients	11
FUSE Clients (HoH)	0
<b>% Heads of Household that are FUSE clients</b>	<b>0.00%</b>

**What level of match was provided for the grant term that most recently ended (as reported in the APR)?**

Recipients must match all grant funds, minus leasing, with *at least* 25% cash or in-kind contributions from other sources (24 CFR Part 578.73). Agencies providing match above and beyond the minimum expectation (greater than 50% match) in the most recently concluded grant period will be eligible to receive 2 bonus points. Agencies providing more than 50% match with unspent funds in the most recently ended grant period will not be eligible for the bonus.

## Certification and Submission

Agency should certify and submit the Intent to Renew and Evaluation when ready.

**Certification:** By checking the box, the agency is certifying that the information provided in this form is true and accurate to the best of your knowledge and you acknowledge that continued renewal is based on funding availability and submission of this form does not guarantee or commit any funding to our agency by the CoC.

**Signature by an Authorized Representative is required to submit the Intent to Renew Form and Evaluation.** The Authorized Representative should be equivalent to the Executive Director, Program Director, or similar level position.

Upon submission, the person(s) listed under Contact Information will receive a confirmation email which will include a PDF copy of your response. Please keep this email and a copy of your submission for your records.

**Responses may not be edited after submission.** Agencies may submit a new, complete submission before the stated deadline if necessary. The latest submission will be used for scoring purposes.

## Evaluation Process and Scoring

After your agency has completed and submitted the Intent to Renew and Evaluation for each CoC-funded project, Lane County will complete preliminary scoring, with assistance from the CoC Committee. All agencies will receive a preliminary score as soon as possible and by no later than **May 5th**. See [Scoring and Ranking](#) for more information.

Agencies will then have an opportunity to review the scores, ask questions, and /or submit a formal appeal. See [Appeals](#) for more information.



## Appendix A. Reporting Formulas

SYSTEM PRIORITIES		
<p>1. Does the project serve individuals and families that meet HUD’s definition of chronically homeless?</p> <p>How many households have you served from January 1, 2022-December 31, 2022?</p> <p>How many of the households met HUD’s definition of chronically homeless?</p>	<p>APR</p>	$\frac{\text{Total number of heads of households served during the reporting period who were classified as chronically homeless at program entry}}{\text{Total number of heads of households served during the reporting period}}$
<p>2. Does the project serve individuals or families that meet the specialized population criteria below? (include number of individuals served between January 1, 2022 and December 31, 2022)</p>	<p>CoC Project Eval Report</p>	$\frac{\text{Number of heads of households served during the reporting year with an age under 25}}{\text{Number of households served during reporting year}}$
	<p>CoC Project Eval Report</p>	$\frac{\text{Number of heads of households served during the reporting year with a VI – SPDAT score of 15 or higher}}{\text{Number of households served during reporting year}}$

<input type="checkbox"/> Youth head of household (under 25) <input type="checkbox"/> Highly Vulnerable (VI-SPDAT score 15 and above) <input type="checkbox"/> Frequent Users (FUSE)	CoC Project Eval Report	$\frac{\text{Number of heads of households served during the reporting year who were Frequent Users of Systems (FUSE)}}{\text{Number of households served during reporting year}}$
<b>PROJECT PERFORMANCE</b>		
1. Is the project at or above 80% utilization for the previous calendar year (2022)?  <i>Must be at or above 80% for each quarter and overall average</i>	APR	$\frac{\text{Number of clients enrolled on each PIT date (APR)}}{\text{Number of beds available on each PIT date (APR)}}$  Average bed utilization for full reporting year
<b>(All Project Types)</b>  2. Of the individuals who were housed during the calendar year through the program (move-in date), what percentage were housed within 90 days of entry?	CoC Project Eval Report	$\frac{\text{Number of individuals with a move – in date within 90 days of Entry date}}{\text{Number of individuals with an Entry > 90 days and no move – in date and all individuals with a move – in date}}$
<b>(All Project Types)</b> 3. Of the individuals who left the project (leavers), what percentage exited to a permanent destination?	APR	$\frac{\text{Number of individuals who exited the project to a permanent destination}}{\text{Number of individuals who exited the project during the reporting year}}$

<p><b>(All Project Types)</b>  4. What percentage of adults and heads of household without source of non-cash benefits at entry, obtained non-cash benefits through mainstream resources?</p>	<p>APR</p>	$\frac{\text{Number of adults and HoH whom did not have a non – cash benefit at program entry where the HoH has been enrolled for at least 365 days or exited the project during the reporting year and has now obtained non – cash benefit}}{\text{Number of adults or households whom did not have non – cash benefits at entry where the HoH has been enrolled for at least 365 days or has exited during the reporting year}}$
<p><b>(All Project Types)</b>  5. What percentage of adults maintained or increased their income through cash benefits, earned income, or both?</p>	<p>APR</p>	$\frac{\text{Number of adults which have been enrolled for at least 365 days or exited the program during the reporting year, where the total income is greater than zero and is greater than or equal to the total income at project Entry}}{\text{Number of adults which have either been enrolled for at least 365 days or exited the program during the reporting year}}$

## Appendix B. Narrative Question Rubric

Section	Question	Scoring Rubric
Equity and Inclusion	Provide a description of the project’s strategies for identifying and addressing racial disparities within programming or access, and any significant successes and challenges that the project experienced in this work over the past year. What has the agency done to effectively address challenges?	<p>4 points – Agency has completed some level of racial disparities analysis resulting in specific strategies being identified. Agency is able to speak to successes and challenges over the past year and specific action steps taken to address these challenges.</p> <p>2 Points – Agency has plans or intentions to identify racial disparities, but has not identified specific strategies or completed the analysis needed. Agency is able to speak to successes and challenges in this work and what steps will be taken or have been taken to address the challenges.</p> <p>0 Points – Agency is unable to identify strategies or planned steps to address racial disparities in programming or access. Unable to describe specific steps taken to address challenges.</p>
Equity and Inclusion	Please describe the training and support staff receive related to racial equity, DEI, and cultural competency. Include detail regarding the topics of training, how many staff attended in the past year, and how frequently training is offered and completed.	<p>3 points – Agency has a method to ensure staff are trained in racial equity, DEI and cultural competency. Agency is able to provide detail of topics of training in these areas, specific number of staff attended in the past year, and overall detail on how frequent training occurs and is completed by staff.</p> <p>2 Points – Agency has demonstrated some effort to ensure staff are trained in racial equity, DEI, and cultural competency, however, does not provide specifics on the topics of trainings, how many staff attended, or is unable to show how frequently training occurs. Agency has not fully implemented a training approach or method in the area of racial equity.</p> <p>1 point – Agency demonstrates minimal effort to ensure staff are trained in racial equity, DEI, and cultural competency. Unable to provide specifics or specifics provided are minimal. Training is sporadic or inconsistent. Methods are indicated but unclear.</p> <p>0 Points – Agency does not have a method to ensure staff are trained in racial equity, DEI, or cultural competency or the method described is otherwise inadequate. Specifics of staff training are not identified or able to be demonstrated by agency.</p>
Participant Focus	Must provide at least one issue that arose from feedback, how the agency responded, <b>AND</b> how this response was communicated back to participants.	<p>5 Points – Agency has a method to regularly receive and respond to feedback related to the project, is able to clearly identify and detail an issue that arose from feedback in the past year (2022), provide specifics of how the issue was responded to, and specifically how this was communicated to participants with effective method(s) identified (e.g. posted publicly, newsletter, individually in case management, etc.)</p> <p>3 points – Agency has a method to regularly receive and respond to feedback, is able to identify an issue that arose from feedback, but the issue is not recent, has been used previously, or is not related to the</p>

		<p>project. Agency provides some level of response to the issue, although inadequate or not substantive detail provided or offered. Agency made attempt to communicate the response back to the participants, but could have been more thorough, effective, or otherwise provided more substantive detail.</p> <p>1 Point – Agency has a method to receive and respond to feedback, but method is not regular or consistent. Agency can identify an issue, but issue is not recent or has been used in previous evaluations. Unclear if the agency responded adequately to the issue or response provided was not adequate for the issue. Little or no communication of the response back to participants, or method of communication not identified.</p> <p>0 Points – Agency may or may not have a method to receive and respond to feedback. Agency unable to identify an issue or provided inadequate detail. Agency did not respond the issue or communicate the response to participants.</p>
--	--	---

## Appendix C. List of Attachments

Use this reference as a checklist of required attachments. All attachments must be under 5MB.

Attachment	Applicable Questions
<input type="checkbox"/> LC CoC Project Evaluation Report (Excel format) <input type="checkbox"/> CoC APR (Excel format) <input type="checkbox"/> DQ for UDE PLUS (Excel format)	<p><b><u>Homeless Management Information System (HMIS) and Data Quality</u></b>  <i>Question 3. 5% missing values (completeness)</i>  <i>Question 4. Timeliness grade (timeliness)</i>  <i>Question 5. Interim/Annual Reviews (completeness)</i>  <i>Question 6. Interim/Annual Reviews (timeliness)</i></p> <p><b><u>Project Performance Outcomes</u></b>  <i>All Questions</i></p> <p><b><u>Bonus</u></b>  <i>Question 1. Chronic Homelessness</i>  <i>Question 2. Specialized Populations</i></p>
<input type="checkbox"/> Letter of Explanation (.pdf or .doc)	<p><b><u>Threshold</u></b>  <i>All Questions if answer is No</i></p>
<input type="checkbox"/> Completed Recapture Spreadsheet (.pdf format)	<p><b><u>Grant Expenditure</u></b>  <i>Question 1b. Recapture Spreadsheet, if full not 100% spent for last grant period</i></p>
<p>Based on response, attachments <i>may</i> need to include:</p> <input type="checkbox"/> written policy, vision or mission statement, etc. that is on agency letterhead <input type="checkbox"/> racial disparities assessment or summary of findings <input type="checkbox"/> racial equity plan and any supporting documentation related to monitoring the plan <input type="checkbox"/> results of ongoing evaluation	<p><b><u>Equity and Inclusion</u></b>  <i>Question 1. Steps and Methods to Address Equity</i></p>

<input type="checkbox"/> committee charter or bylaws or other supporting documentation outlining the internal structures established <input type="checkbox"/> job descriptions or work plans reflecting racial equity knowledge, skills, and practices <input type="checkbox"/> documentation of training completed within the last calendar year or at hire for new staff within the last year <input type="checkbox"/> supporting documentation that demonstrates how management consistently applies a racial equity lens.	
<input type="checkbox"/> Client Rights document	<b><u>Participant Focus</u></b> <i>Question 2. Client Rights</i>
<input type="checkbox"/> Written Eligibility Criteria	<b><u>Housing First</u></b> <i>Question 1. Written Eligibility Criteria</i>
<input type="checkbox"/> Written Termination Policies	<b><u>Housing First</u></b> <i>Question 1. Written Termination/Discharge Policies</i>