

**Partners Ending Homelessness
Local Monitoring Training
FY2023 Grant Year**

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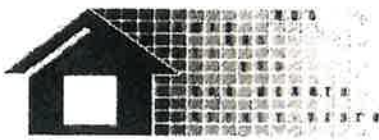
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What we will talk about today

- Documentation
- Preparing for Monitoring
- Changes to the site visit check list
- Schedule and responsibilities


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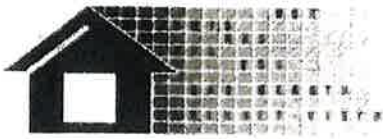


Homeless Definition

RECORDKEEPING REQUIREMENTS



	Category 1	Literally Homeless	<ul style="list-style-type: none"> • Written observation by the outreach worker; <u>or</u> • Written referral by another housing or service provider; <u>or</u> • Certification by the individual or head of household seeking assistance stating that (s)he was living on the streets or in shelter; • For individuals exiting an institution—one of the forms of evidence above <u>and</u>: <ul style="list-style-type: none"> ○ discharge paperwork <u>or</u> written/oral referral, <u>or</u> ○ written record of intake worker's due diligence to obtain above evidence <u>and</u> certification by individual that they exited institution
	Category 2	Imminent Risk of Homelessness	<ul style="list-style-type: none"> • A court order resulting from an eviction action notifying the individual or family that they must leave; <u>or</u> • For individual and families leaving a hotel or motel—evidence that they lack the financial resources to stay; <u>or</u> • A documented and verified oral statement; <u>and</u> • Certification that no subsequent residence has been identified; <u>and</u> • Self-certification or other written documentation that the individual lack the financial resources and support necessary to obtain permanent housing
	Category 3	Homeless under other Federal statutes	<ul style="list-style-type: none"> • Certification by the nonprofit or state or local government that the individual or head of household seeking assistance met the criteria of homelessness under another federal statute; <u>and</u> • Certification of no PH in last 60 days; <u>and</u> • Certification by the individual or head of household, and any available supporting documentation, that (s)he has moved two or more times in the past 60 days; <u>and</u> • Documentation of special needs <u>or</u> 2 or more barriers
	Category 4	Fleeing/ Attempting to Flee DV	<ul style="list-style-type: none"> • <i>For victim service providers:</i> <ul style="list-style-type: none"> ○ An oral statement by the individual or head of household seeking assistance which states: they are fleeing; they have no subsequent residence; and they lack resources. Statement must be documented by a self-certification or a certification by the intake worker. • <i>For non-victim service providers:</i> <ul style="list-style-type: none"> ○ Oral statement by the individual or head of household seeking assistance that they are fleeing. This statement is documented by a self-certification or by the caseworker. Where the safety of the individual or family is not jeopardized, the oral statement must be verified; <u>and</u> ○ Certification by the individual or head of household that no subsequent residence has been identified; <u>and</u> ○ Self-certification, or other written documentation, that the individual or family lacks the financial resources and support networks to obtain other permanent housing.



Homeless Definition

CRITERIA FOR DEFINING HOMELESS	Category 1	Literally Homeless	(1) Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning: <ul style="list-style-type: none"> (i) Has a primary nighttime residence that is a public or private place not meant for human habitation; (ii) Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); <u>or</u> (iii) Is exiting an institution where (s)he has resided for 90 days or less <u>and</u> who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution
	Category 2	Imminent Risk of Homelessness	(2) Individual or family who will imminently lose their primary nighttime residence, provided that: <ul style="list-style-type: none"> (i) Residence will be lost within 14 days of the date of application for homeless assistance; (ii) No subsequent residence has been identified; <u>and</u> (iii) The individual or family lacks the resources or support networks needed to obtain other permanent housing
	Category 3	Homeless under other Federal statutes	(3) Unaccompanied youth under 25 years of age, or families with children and youth, who do not otherwise qualify as homeless under this definition, but who: <ul style="list-style-type: none"> (i) Are defined as homeless under the other listed federal statutes; (ii) Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to the homeless assistance application; (iii) Have experienced persistent instability as measured by two moves or more during in the preceding 60 days; <u>and</u> (iv) Can be expected to continue in such status for an extended period of time due to special needs or barriers
	Category 4	Fleeing/ Attempting to Flee DV	(4) Any individual or family who: <ul style="list-style-type: none"> (i) Is fleeing, or is attempting to flee, domestic violence; (ii) Has no other residence; <u>and</u> (iii) Lacks the resources or support networks to obtain other permanent housing

Defining a Disability

- Physical, mental, or emotional impairment which is expected to be of long-continued and indefinite duration, substantially impedes the person's ability to live independently, and is of such nature that such ability could be improved by more suitable housing conditions. Developmental Disability and HIV/AIDS have their own additional defining points

<https://www.hudexchange.info/resource/1953/determining-homeless-and-at-risk-status-income-and-disability-webinar/>

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Documenting a Disability

- Client file must contain:
- Written verification by a professional who is licensed to diagnose and treat disability. Must include certification that the disabling condition is expected to be long continuing/of indefinite duration, and substantially impedes the individual's ability to live independently; or
- Written verification from Social Security Administration or receipt of a disability check (SSDI/S, VA); or
- Initial observation by intake staff with confirmation by professional no later than 45 days after client is accepted
- If client entered during a waiver period, the file must contain the waiver from HUD.

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Disability Verification Form

To: _____

RE: _____

_____ SS#: _____ is a HUD (Housing and Urban Development) funded program and therefore requires that each applicant meet established criteria for being disabled. U.S. Departments of Housing and Urban Development (HUD) regulations establish criteria which must be met for an applicant to be determined (based on disabled or handicapped status) eligible.

- Has a disability, as defined in Section 223 of the Social Security Act [42 USC 423] defines disability as (Written verification from the social Security Administration) (1) :
1. "Inability to engage in any substantial, gainful activity by reason of any medical determinable physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months," or
 2. "In the case of an individual who attained the age of 55 and is blind and unable by reason of such blindness to engage in substantial, gainful activity requiring skills or ability comparable to those of any gainful activity in which he has previously engaged with some regularity and over a substantial period of time."
 3. Receipt of disability check (Social Security disability Insurance check or Veterans Disability Compensation)

OR

Is determined, according to HUD regulations, to have a

- Substance Use Disorder
- Chronic Health Condition
- Mental Health Disorder
- Physical Disability
- If yes to any of the checked above, will the Disorder/Condition/Disability be expected to be of long, continued, and indefinite duration and substantially impair the ability to live independently?*
- HIV/AIDS

OR

- Has a developmental disability as defined in 42 U.S.C. 6001. Section 102(7) of the Developmental Disabilities Assistance and Bill of Rights Act [42 U.S.C. 6001(7)] defines developmental disability in functional terms as: "Severe chronic disability that:
- Is attributable to a mental or physical impairment or combination of mental and physical impairments;
 - Is manifested before the person attains age 22;
 - Is likely to continue indefinitely;
 - Results in substantial functional limitation in three or more of the following areas of major life activity (1) self-care, (2) receptive and responsive language, (3) learning, (4) mobility, (5) self-direction, (6) capacity for independent living, and (7) economic self-sufficiency: and
 - Reflects the person's need for a combination and sequence of special, interdisciplinary, or generic care, treatment, or other services which are of lifelong or extended duration and are individually planned and coordinated."

1. FN – 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (3)
2. FN – 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (1)
3. FN – 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (2)
4. FN – 582.301 "recordkeeping" of the Final Rule on Homelessness (C) Disability (4)

- Intake staff –recorded observation for a disability No later than 45 days after the application for assistance is confirmed and accompanied by evidence. (4)

Intake date _____

Other: _____

HUD's definition does not exclude persons who have the disease of acquired immunodeficiency syndrome or any conditions arising from the etiologic agent for acquired immunodeficiency syndromes.

- I certify that the above information is correct to the best of my knowledge and belief, and I am licensed to treat the above diagnosis.

(Print Name)

(Date)

(Signature)

(Title of physician or other licensed health professional)

License Number

(Address)

(Phone Number)

1. FN – 582.301 “recordkeeping” of the Final Rule on Homelessness (C) Disability (3)
2. FN – 582.301 “recordkeeping” of the Final Rule on Homelessness (C) Disability (1)
3. FN – 582.301 “recordkeeping” of the Final Rule on Homelessness (C) Disability (2)
4. FN – 582.301 “recordkeeping” of the Final Rule on Homelessness (C) Disability (4)

	TITLE	DIAGNOSE ADDICTIONS	DIAGNOSE MENTAL HEALTH DISABILITY
Psy.D	Psychiatrist/Psychologist	yes	yes
MD	Medical Doctor	yes	yes
NP	Nurse Practitioner	yes	yes
PA	Physician Assistant	yes	yes
PNP	Psychiatric Nurse Practitioner	yes	yes
PMHN	Psychiatric Mental Health Nurse	yes	yes
APRN	Advance Practice Registered Nurse	yes	yes
RN	Registered Nurse (assignments are directed by MD, etc.)	no	no
LPN	Licensed Practical Nurse (operates under direction of RN, MD, etc.)	no	no
LCSW	Licensed Clinical Social Worker	yes	yes
LMSW	Licensed Master Social Worker (Yes, under supervision of LCSW, MD)	No/yes	No/yes
LMHC	Licensed Mental Health Counselor	yes	yes
BSW	Bachelors Social Worker	no	no
CRC	Certified Rehabilitation Counselor	yes	yes
CASAC	Credentialed Alcohol & Substance Abuse Counselor	yes	no
CATC	Certified Addictions Treatment Counselor	yes	no

Documentation

Upon intake - (Housing 1st)

Homeless Verification (RRH only)

Disability Verification (if during the HUD waiver period, must have a waiver in folder)

After the client has been housed

Case notes

Photo ID

SS number

Lease Information

Family dynamic information

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Case Manager requirements

- PSH—Per HUD regulations, the CM must provide case management; there is no requirement on the regularity of the service. The community standard is that contact with the client should be at least once a month or more, based on the client's necessity for supportive services.
- RRH—In strict adherence to HUD regulations, the case manager is required to meet with the client at least once a month as long as the client is enrolled in the RRH project. This commitment to regulatory compliance ensures the security and effectiveness of our RRH projects.

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PREPARING FOR MONITORING.

As key participants in the CoC program, it's crucial that the recipients and sub-recipients are well-versed in the program's requirements, especially if any areas of improvement have been highlighted in previous monitoring reports.

The Monitoring team will review the following before the site visit:

- APR in SAGE project end in 2024 (FY23 grant year)
 - **This data comes from the PARTICIPANTS DATA THAT CASE MANAGERS IN YOUR PROJECT PUT INTO HMIS!**

The following materials for reviewers will be required **a week before the site visit:**

- Current to date active rent roll or program roster
- List of clients who entered from Coordinated Entry
- List of clients who exited the program within the program year-end in 2024 (FY23 grant year)
- The following only needs to be sent or given to the team once (can be given before or during the site visit):
- A copy of the program's policies that cover requested policies and procedures referenced in the monitoring checklist.

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PREPARING FOR MONITORING.

The following will be reviewed at the time of the site visit:

The file review process is a crucial part of our operations. We will review at least three total, or 10% of the caseload files, from the start of the program to the date of monitoring.

If items on the next slide are not successfully given to the monitoring team during the first site visit, it will result in a "No" for the monitoring question, "Was the Project prepared for the site visit?" This includes the clients' files requested.

All the project information in HMIS will be collected during the site visit. To ensure this, we will run the project's HMIS client information one week before the monitoring team arrives at the site. This clear timeline helps us plan our tasks effectively and ensures compliance with monitoring requirements.

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FILE SELECTION AND SAMPLING

PEH Staff will email the project 24 hours before the site visit with a list of files we would like to review. Please ensure these files are ready for review during the site visit. (File selection will be made using a random selection)

Reviewers will consider the following factors when determining the specific files that will comprise the review sample:

A. Where feasible, initial method: At least three files and up to 10% of the project's caseload from the program, from the start of the program to the present day.

B. The reviewers will consider adding more files to this selection to:
(Include a file or files from each staff person working in the respective program area being monitored)

Expand the sample, if necessary, to include additional files with the same characteristics if indicated by the severity or nature of any problem(s) noted during the initial selection's review (for example, the same problem category, the same staff person, the same activities, or other characteristics). This expanded sampling aids in determining whether problems are isolated events or represent a systemic problem.

C. The reviewers may also add files to the selection from any project that the PEH reviewers believe may have compliance problems or substantially different size, complexity, or other factors from other projects the recipient has funded.

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Monitoring Form online

<https://letsendhomelessness.org/about/monitoring/>

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Partners Ending Homelessness

Agency Name:	
Program Name:	
Grant Identification #	
Operating Year:	
The number of HUD Units:	
The number of HUD Beds:	
Program Type:	
Grant Amount Total:	\$0.00
Leasing	\$0.00
Rental Assistance	\$0.00
Operations	\$0.00
Support Services	\$0.00
HMIS	\$0.00
Administration	\$0.00
Agency Representative(s) at review	
Review Date:	
Monitoring team at review:	
Total Score	0

Please note that questions highlighted in red are scored as follows:

- If the answer is "No," a negative score is given, and the specified amount will be deducted from the total score.
- If the answer is "Yes," a zero score is given, and no points will be lost.

HMIS Privacy/Security:

			Project's Score	Scoring
1	HMIS Participation Consumer Notice is posted in a conspicuous location.			Yes= 0 No=-1
2	Has the program attended a new or refresher HMIS training this past year?			Yes= 2 No= 0
Section Total:			0	Max Score = 2 Min Score = -1

COC Policy Binder :

1	Agency policy for client privacy in HMIS			Yes= 0 No=-1
2	The agency has a procedure/policy to assist clients who are hearing impaired or do not speak English as a primary language.			Yes= 0 No=-1
3	Agency procedure with an organized exit process includes proper communication of the discharged destination in the file.			Yes= 0 No=-1
4	The agency has a process to ensure that first and last names are correctly spelled and that the DOB is accurate. Describe the process: (is it documented, and are all Staff informed?)			Yes= 0 No=-1
4A	If yes, are all employees trained to follow policy?			Yes= 0 No=-1
5	Policies/procedures for use of client data generated from HMIS			Yes= 0 No=-1
6	Policies/procedures for client information storage and disposal.			Yes= 0 No=-1
Section Total:			0	Max Score = 0 Min Score = -7

Client Consent and Release of Information (ROI)

1	Is the agency using the current (6/17/2021) HMIS ROI?			Yes= 0 No=-1
2	Is the agency using the current HMIS ROI addendum (dated 4/19/2024 or later) ?			Yes= 0 No=-1

3	Is there a policy in place for Housing First? Zero Barriers to entry beyond federal mandatory safety regulations. (Pertains only to projects where Housing First is applicable)			Yes= 0 No=-3
4	A written process is followed for all clients to confirm homelessness			Yes= 0 No=-3
5	A written process is followed for all clients to confirm disability.			Yes= 0 No=-3
6	A policy states: Person(s) with lived experience are on the Board of Directors or involved in other policy-making groups.			Yes= 0 No=-1
7	The program has a formal procedure in place for terminating assistance to participants.			Yes= 0 No=-1
8	A policy states that participants are not required to participate in inherently religious activities.			Yes= 0 No=-1
9	A policy states that participants cannot be denied benefits/services based on religion.			Yes= 0 No=-1
10	A policy/procedure identifies a staff person designated as an educational liaison that will ensure children are enrolled in school, connected to Head Start, Part C of the Disabilities Act.			Yes= 0 No=-1
11	A policy that states the age and gender of a child under age 18 is not used as a basis for denying any family's admission to the program.			Yes= 0 No=-1
12	Is there evidence that the recipient has implemented procedures to ensure availability of information on the existence and locations of facilities and services accessible to persons with disabilities?"			Yes= 0 No=-1
13	Does the recipient have written policies to comply with non-discrimination, Equal Opportunity & Fair Housing regulations in providing services?			Yes= 0 No=-1
14	The agency has a procedure for file reviews, action plans, and a timeline for correcting file deficiencies.			Yes= 0 No=-1
Section Total:			0	Max Score = 2 Min Score = -20
Page Total			0	Max Score = 2 Min Score = -28

HMIS Data Intake and Exit :

		Project's Score	Scoring
1	Using the paper HMIS intake data collection forms which align with the 2024 Data Standards intake form.		Yes= 0 No=-1
2	The agency is actively monitoring program participation entries of clients. 80% of entries are completed in HMIS within 72 hours.		Yes= 0 No=-1
3	There is congruity between the case record responses based on the applicable homeless definition. (Is the client homeless? Has housing status and prior living situation been completed appropriately?)		Yes= 0 No=-1
4	Income, non-cash benefits, and insurance are updated at least annually and at exit.		Yes= 0 No=-1
4A	90% of discharge destination data is appropriately entered into HMIS on the exit screen note section.		Yes= 2 No= 0
5	HMIS active client list matches the Project's active client list 100% (within 72 hours before the site visit)		Yes= 2 No= 0
6	APR 6d Chronic Homelessness		Yes= 2 No= 0
Section Total:		0	Max Score = 6 Min Score = -4

APR 6a to 6c (1 pt for each 0%)
20b & 21 (1 pt for each if the client doesn't know & data not collected = 0)

6a DQ Personally Identifiable Information		Scoring
1	Name	Yes= 1 No= 0
2	Social Security Number (At least last 4 digits)	Yes= 1 No= 0
3	Date of Birth	Yes= 1 No= 0
4	Race and Ethnicity	Yes= 1 No= 0
5	Gender	Yes= 1 No= 0
Section Total:		0 Max Score = 5 Min Score = 0

6b Universal Data Elements (5 pts)

1	Veterans Status			Yes= 1 No= 0
2	Project Start Date			Yes= 1 No= 0
3	Relationship to Head of Household			Yes= 1 No= 0
4	Enrollment CoC (NY-500)			Yes= 1 No= 0
5	Disabling Condition			Yes= 1 No= 0
Section Total:			0	Max Score = 5 Min Score = 0

6c Income & Housing Data Quality (4 pts)				
	Destination			Yes= 1 No= 0
	Income & Sources at Start			Yes= 1 No= 0
	Income & Sources at Annual Assessment			Yes= 1 No= 0
	Income & Sources at Exit			Yes= 1 No= 0
Section Total:			0	Max Score = 4 Min Score = 0

20b Non-Cash Benefits (4 pts) & 21 Health Insurance (6 pts)				
1	Non-cash client doesn't know/Prefers not to answer			
1A	Start			Yes= 1 No= 0
1B	Exit			Yes= 1 No= 0
1	Non-cash client data not collected			
1A	Start			Yes= 1 No= 0
1B	Exit			Yes= 1 No= 0
2	Health Insurance client doesn't know/Prefers not to answer			
2A	Start			Yes= 1 No= 0
2B	Annual			Yes= 1 No= 0

2C	Exit			Yes= 1 No= 0
3	Health Insurance data not collected			
3A	Start			Yes= 1 No= 0
3B	Annual			Yes= 1 No= 0
3B	Exit			Yes= 1 No= 0
Section Total:			0	Max Score = 10 Min Score = 0
Page Total			0	Max Score = 30 Min Score = -4

Possible points (+30 -10) Section Point totals

Coordinated Entry

			Project's Score	Scoring
Have 100% of clients entered the program via the prioritization list? (FY23)	%			Yes= 0 No=-1
Do 75% of clients referred from the prioritization list to the Project have entry dates?	%			Yes= 0 No=-1
100% of clients have a prioritization list referral follow-up note in the client's HMIS file within 14 days of referral.	%			Yes= 0 No=-1
The average time from referral to project entry is 14 days, regardless of RRH or PSH	Days			Yes= 2 No= 0
The average number of days to program entry to housed (PSH within 45 days, RRH within 30 days)	Days			Yes= 2 No= 0
70% of referrals made to the program during the project year have been housed	%			Yes= 2 No= 0
Less than 10% of clients referred from the prioritization list to the Project have rejected this Project.	%			Yes= 3 No= 0
Less than 10% of this Project's referrals from the prioritization list have rejected the client.	%			Yes= 3 No= 0
Section Total:			0	Max Score = 12 Min Score = -4

Page Total	0	Max Score = 12 Min Score = -3
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Possible points (+12 -3) Section Point totals

Information / Documentation

					Project's Score	Scoring (Points)
1	Utilization rate of in-project? (Units) 100% + (5 points) 100% (4 points) 99%- 95% (3 points) 94%-90% (1 points) 89% - 80% (-3 point) 79% and below (- 8 points)	Amount of Units Funded	Average Amount Utilized	Average Unit Utilization Rate to Date	#DIV/0!	-5 to 7 points
		0	January Households 0			
			April Households 0			
			July Households 0			
			October Households 0			
2	Drawdown of Funds 100% (5 points) 99%- 95% (4 points) 94%-90% (2 points) 89% - 80% (1 point) 79% and below (- 3 points)	Amount of Funds Requested	Amount of Funds Spent	#DIV/0!		-3 to 5 points
		\$0.00	\$0.00			
2	Is a lead-based paint certificate on file for projects working with family files					Yes= 0 No=-1
3	Supportive Housing Assessments Percentage of housing assessment completed during project year (the number of completed assessments divided by the number of clients equals 95%)	Number of Heads of Household	Number of Completed Supportive Housing Assessments	#DIV/0!		Yes= 2 No= 0
		0	0			
3A	All Clients that have been in the Project for over a year have an updated housing assessment completed during the project year (the number of completed assessments divided by the number of clients with a year plus in the projects equals 95%)	0	0	#DIV/0!		Yes= 2 No= 0
4	Acuity Index Percentage of Acuity Index completed during project year (the number of completed Acuity Index divided by the number of clients equals 95%)	Number of Heads of Household	Number of Completed Acuity Index	#DIV/0!		Yes= 2 No= 0
		0	0			
4A	All Clients that have been in the Project for over a year have an updated acuity index completed during the project year (the number of completed assessments divided by the number of clients with a year plus in the projects equals 95%)	0	0	#DIV/0!		Yes= 2 No= 0

Section Total:

0

Max Score = 20
Min Score = -9

Page Total

0

Max Score = 20
Min Score = -9

Proposed Bed and Unit Inventory

The number of beds and units shown here come from the grant application as it was submitted in a grant. This information is not able to be edited by the Recipient or the CPD Representative. These represent the number of beds/units funded under the award unless amended post-award.

Total Number of Year Pooled Beds/Units from Application	
Total Units	27
Total Beds	50
Total Dedicated CH Beds	0
Total Non-Dedicated CH Beds	50

Units from APR

PIT Actual Bed and Unit Utilization

The numbers here are reported by the recipient and are to reflect the number of beds and units that were occupied and available for occupancy on the last Wednesday of the appropriate month. The chart is comparing the number of beds and units the recipient proposed to the number the recipient had actually occupied and/or were available.

- Occupied means a unit which has persons residing within the unit. (Count each unit and bed occupied.)
- Available for occupancy means a unit which is "temporarily available" to be occupied. That is one where 1) in a site-based project the unit included in the grant of award AND 2) in a scattered-site project ready to allow includes all leasing sublets which are available but which a client has not reached to see and/or units which will be rented with future availability, those above the number of units awarded in the grant based on funding availability.

The application number and the occupancy number may (approximately) differ for reasons. For example, the project may have fewer beds and units available because the project had a slow start-up or a unit may have been reserved, or the project may have more beds and units available by a monthly reporting availability based on the amount of leasing funds available on the last Wednesday of any given quarter (scattered-site housing only).

Point-in-Time Utilization on the Last Wednesday (Quarterly)	Occupied AND Available for Occupancy As Completed in the APR by the Recipient					Average % of Actually Available to Proposed
	As Proposed in the Application	January	April	July	October	
Units	27	24	23	25	26	90.74%
Beds	50	57	50	58	61	113.00%

Units from the Point in Time Count

Explanation, as necessary

If the number of beds and units proposed is different from the number actually available on the last Wednesday of each month please explain why. Being a leasing project, each time a tenant vacates a property the units need to be re-leased to new tenants. The program is actively working on developing ways to reduce

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Development	HMIS	
Acquisition	Equipment (Server, Computers, Printers)	
Relief/Rezone	Software (Software Fees, User Licenses, Software Support)	
New Construction	Services (Training, Hosting, Programming)	
Development Subtotal	Personnel (Costs Associated with Staff)	
	Space and Operations	
	HMIS Subtotal	0.00
Supportive Services		
Assessment of Service Needs		
Assistance with Moving Costs	Leasing, Rental Assistance, and Operating	
Case Management	Peer Property Leasing (Does Not Require Match)	256,695.00
Child Care	Short /Medium Term Rental Assistance	
Education Services	Long-Term Rental Assistance	
Employment Assistance	Operating Costs	10,112.00
Food	Leasing, Rental Assistance, & Operating Subtotal	266,807.00
Housing /Counseling Services		
Legal Services	Administration	
Life Skills	Administration	14,176.00
Mental Health Services	Administration Subtotal	14,176.00
Outpatient Health Services		
Outreach Services		
Substance Abuse Treatment Services		
Transportation	Total Expenditures	297,696.00
Utility Deposits		
Operating		
Supportive Services Subtotal	Match	
	Cash Match	18,576.12
	In-Kind Match	0
	Total Match	18,576.12
	Total Expenditures Requiring a Match	40,991.00
	Percentage Match	45.32%
	Total Budget (Expenditures Plus Match)	316,262.12

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Supportive Housing Assessments

Client#	Entry Date	Date of Original Assessment	Date of Latest Update	Exit Date
351	8/4/2022	10/31/2022	3/7/2024	
352	9/7/2022			
353	9/21/2022	12/1/2022	9/8/2023	
354	9/22/2022	2/15/2023	1/29/2024	
355	9/28/2022	12/1/2022	1/29/2024	
356	10/4/2022	12/15/2022		
357	10/21/2022	5/17/2023	1/31/2024	
358	10/27/2022	2/14/2023	10/27/2023	
359	11/7/2022	11/7/2022		
360	11/14/2022	2/1/2023	1/30/2024	
361	11/15/2022	5/17/2023	1/31/2024	
362	11/17/2022	11/17/2022	4/2/2024	
363	1/10/2023	3/20/2023		
364	1/31/2023	3/23/2023	1/10/2024	
365	3/10/2023	5/17/2023	2/2/2024	
366	3/17/2023	3/17/2023	1/22/2024	
367	3/21/2023		3/6/2024	
368	3/22/2023	3/22/2023	3/5/2024	
369	3/28/2023	3/28/2023	3/6/2024	
370	3/30/2023	7/31/2023	2/2/2024	

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Acuity Index

Client#	Entry Date	Date of Original Assessment	Date of Latest Update	Acuity score	Exit Date	Housing Move-in Date (PSH & RRH Programs only)	E/E
12301	8/4/2022	10/31/2022	3/7/2024	0		10/6/2022	HUD
12301	8/4/2022	10/31/2022	3/7/2024	5		10/6/2022	HUD
12302	8/4/2022					10/6/2022	HUD
12303	9/7/2022	12/9/2022	3/7/2024	15		11/15/2022	HUD
12303	9/7/2022	12/9/2022	3/7/2024	18		11/15/2022	HUD
123038	9/21/2022	12/1/2022	9/8/2023	24		10/19/2022	HUD
123038	9/21/2022	12/1/2022				10/19/2022	HUD
12305	9/21/2022	12/1/2022	9/8/2023	24		10/19/2022	HUD
12305	9/22/2022	2/15/2023	1/29/2024	14		12/21/2022	HUD
123062	9/22/2022	2/15/2023	1/29/2024	12		12/21/2022	HUD
123062	9/22/2022	2/15/2023	1/29/2024	14		12/21/2022	HUD
12307	9/28/2022					11/1/2022	HUD
12307	9/28/2022	12/1/2022	1/29/2024	22		11/1/2022	HUD

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Project Outcomes

	Project % (APR 2023)	Community Benchmarks	All CoC% for Project APR year	All PSH/RRH/TH % For Project APR Year	Total Points
1	0%	92%	0%	0%	0
2	0%	20%	0%	0%	0
3	0%	40%	0%	0%	0
4	0%	15%	0%	0%	0
5	0%	85%	0%	0%	0
6	0%	90%	0%	0%	0
7	0%	20%	0%	0%	0
8	0%	40%	0%	0%	0
9	0%	45%	0%	0%	0

Points for Section 1

0

Increase or Decrease year over year.

	Project % -2023	Project % -2024	Community Benchmarks	% increase or decrease	Total Points
1	0%	0%	92%	0%	0
2	0%	0%	20%	0%	0
3	0%	0%	40%	0%	0
4	0%	0%	15%	0%	0
5	0%	0%	85%	0%	0
6	0%	0%	90%	0%	0
7	0%	0%	20%	0%	0
8	0%	0%	40%	0%	0
9	0%	0%	45%	0%	0

Projects will get 1 point for every 1% increase, with a maximum of 5 points under the community benchmark.

Projects will get 1 point taken off for every 1% decrease under the community benchmark, with a maximum of 5 points taken off under the community benchmark.

Projects at or above the community benchmark for FY23 will receive 5 points, and projects at or above the community benchmark for FY23 and FY22 will receive two bonus points.

Points for Section 2

0

Possible Points for Section 1: A total of 39 Positive Points
Possible Points for Section 2: a total of 63 Positive Points/45 Negative Points

**Total Points for Sections
1 and 2**

Page Total

0

Notes about Files

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Points for File review	#DIV/0!
Page Total	0

(1) A checked box indicates the client has this information.

(2)- For total points, you must have the document for every year the client is housed in the Project. This includes the first year of the client being housed in the Project.

** The file review section will be scored using a sliding scale rubric.

Points will be awarded according to the overall percentage of required documents that were present in the audited files:

100% of documents present	15 points
90-99% of documents present	13 points
80-89% of documents present	11 points
70-79% of documents present	9 points
60-69% of documents present	7 points
50-59% of documents present	5 points
40-49% of documents present	3 points
30-39% of documents present	1 points
29-0% of documents present	0 points

Notes about Files

Points for File review		Percentage of Documents Present	#DIV/0!
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Page Total	0
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** The file review section will be scored using a sliding scale rubric. Points will be awarded according to the overall percentage of required documents that were present in the audited files:

100% of documents present	15	points
90-99% of documents present	13	points
80-89% of documents present	11	points
70-79% of documents present	9	points
60-69% of documents present	7	points
50-59% of documents present	5	points
40-49% of documents present	3	points
30-39% of documents present	1	points
29-0% of documents present	0	points

<p>1. What is the percentage of staff at the point in time count? (at minimum)</p> <ul style="list-style-type: none"> o 30% to 20% of total funding = 6 people o 19% to 15% of total funding =5 people o 14%to 10% of total funding = 4 people o 9% to 5% of total funding = 3 people o 4% to 2% of total funding = 2 People 	<p>100% = 5 Points</p> <p>99% to 90% = 4 Points</p> <p>89% to 80% =3 Points</p> <p>79% to 50% = 0 Points</p> <p>49% to 0% = -3 points</p> <p><i>Bonus points for over 100% = 3 Points</i></p>	<p>Percentage of HUD CoC Funding for Program =</p> <hr/> <p>Number of Staff participated in PIT Count =</p>
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Did the program attend the training?			0
Was the Project prepared for the site visit?			

Points for Section	0
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Section Point totals

Section	Possible Positive Points	Possible Negative Points		Section Total
HMIS Privacy/Security & CoC Policy Binder	2	28		0
HMIS Data Intake and Exit	30	10		0
Coordinated Entry	12	3		0
Information/Documentation	20	1		0
Project Outcomes	102	45		0
File Review Section	15	1		0
Client CM Review	15	0		0
Other Scores	2	1		0
Project Totals	198	89	Total Score	0

Notes/Comments:

What will happen next?

- Site visits will be scheduled 90 days after your Project has ended
- You will be emailed to schedule the visit after the training.
 - three projects are happening in a single week
- You will be given three time slot options the week of the visit.
 - The other three projects might get the same available time slots
 - Please pick the time that works best for you and your staff (first come, first served)
- Anywhere from 2 to 4 monitors will show up to the visit, this is including Charles, Jennifer, and Carolyn (once per Program)
- Recipients are responsible for contacting **sub-recipients** about the upcoming site visit.
- A week before, we will request the following (please have it back to us within 24 hours of request)
 - Current to date active rent roll or program roster
 - List of clients who entered from Coordinated Entry
 - List of clients who exited the program within the program year-end in 2023
- 24 hours before we will send out a list of files the team would like to review

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Questions



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