



Using Data in Funding Decisions

April 16th, 2019

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Learning Objectives

- Understand the concepts underlying ranking CoC projects for funding based on community priorities, existing inventory and resources, as well as project performance
- Understand the relationship between project performance and system performance
- Know how to establish performance benchmarks and targets
- Be familiar with CoC Rating and Ranking Tool

Session Overview

1. Review CoC Project funding cycle
2. Demo CoC Rating and Ranking Tool
3. Community Example: Allegheny County
4. Small Group Break Out Session
5. Group Discussion and Wrap Up



Poll the Audience!

Go to **www.menti.com** and use the code **62 28 17**

Do you use a Rating/Ranking process for CoC funding decisions?

- 1) Yes! But want ideas
- 2) No, that's why I'm here
- 3) It's complicated

Guiding Questions

What are the goals
To better serve clients

How are goals achieved
Data informed decisions

Who will achieve these goals
Community process

CoC Goals- Project Level

More effective Projects

- Participants served quicker and more effectively/efficiently
- Projects respond to the changing needs of clients
- Ensure projects type remains relevant to needs
- Ensure projects are remaining cost effective
- Ensure programs and services are informed by
 - Best practices
 - System performance

CoC Goals—System level

More Effective System

- Align resources with strategic plan
- Increase CoC flexibility to respond to a changing environment
- Improve the homeless system of care as a whole
- Ensure homelessness is rare, brief, and non-recurring

2018 CoC NOFA

2. Project Capacity, Review and Ranking. HUD will award up to 29 points to CoCs that demonstrate the existence of a coordinated, inclusive, and outcome-oriented community process for the solicitation, objective review, ranking, and selection of project applications, and a process by which renewal projects are reviewed for performance and compliance with 24 CFR part 578.

How to Achieve these Goals

By using your data to:

1. Define local metrics (priorities)
2. Assess current project performance (baseline)
3. Set benchmarks and targets
4. Monitor performance
5. Rate and Rank
6. Allocate/Reallocate

Who's At The Table

Establish a Review, Rating, and Ranking Process

- Committee, sub-committee, Work Group, etc.

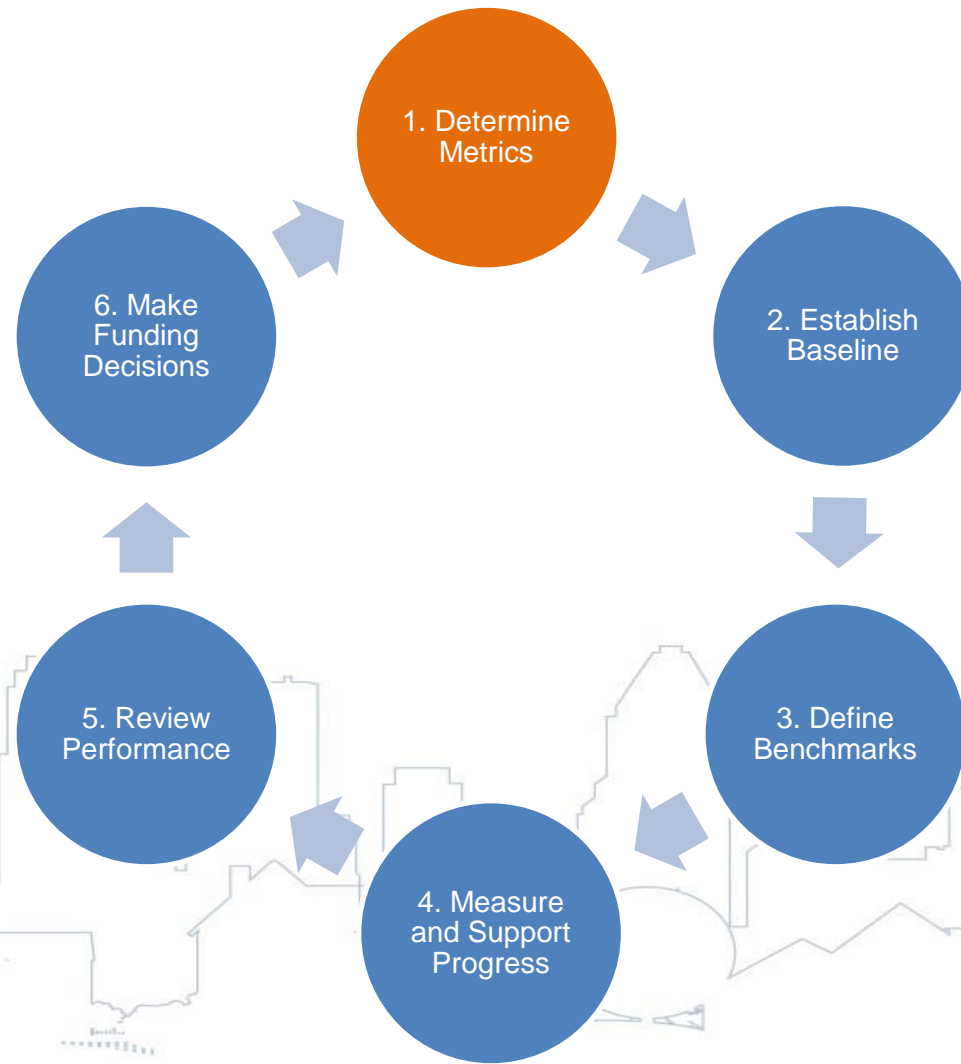
Process uses data to identify:

- Objective Criteria and Past Performance
- Severity of Needs and Performance
- Lower performing projects and reallocate

Develop ongoing Performance Management and Funding Plan

- CoCs can improve their system year-round by regularly monitoring, evaluating, and acting on performance results

CoC Project Funding Cycle

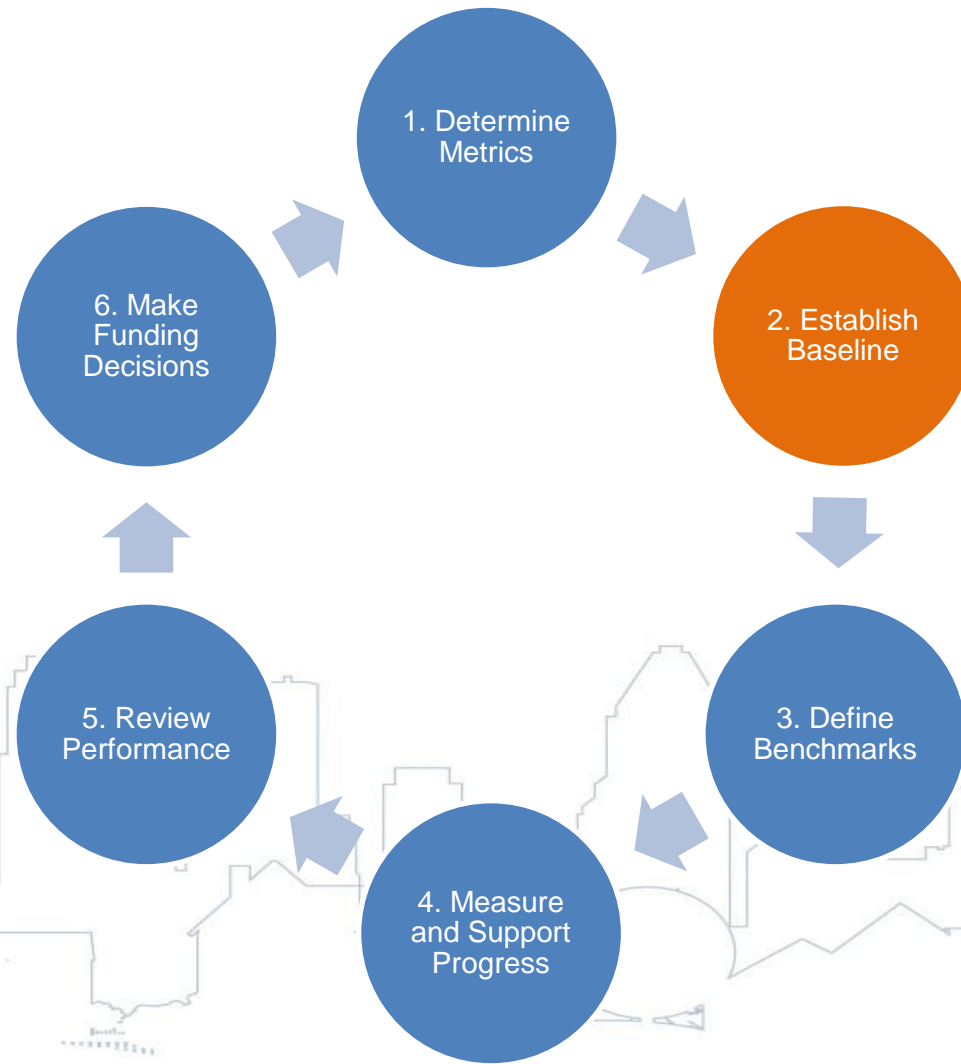


Determine Metrics

What metrics will you use to assess project performance?

- Length of stay in project
- Exits to permanent housing
- Maintain or Increase Income/Employment/Case Benefits
- Based on local needs and priorities set
- What metrics does your community see as the most valuable in ending homelessness?

CoC Project Funding Cycle



Establish a Project Level Baseline

How are your projects performing right now?

Use a variety of data sources:

HMIS Data- APR, CAPER, data quality, canned reports, etc.

- Enable agencies to evaluate and improve their performance
- Can reveal significant information about how each of their projects are functioning where improvements are necessary
- Can help agencies identify gaps in data and services.

Monitoring Outcomes

- Project and fiscal

Data Dashboards

Effects on System Performance

Use of System Performance Measures (System Level)

- Enable communities to evaluate and improve their performance
- Can reveal significant information about how well homelessness assistance programs are functioning as a whole and where improvements are necessary
- Can also help CoCs identify gaps in data and services.

Assess:

- Project-Level Policies and Procedures
- Coordinated Entry
- The Homeless Assistance Portfolio

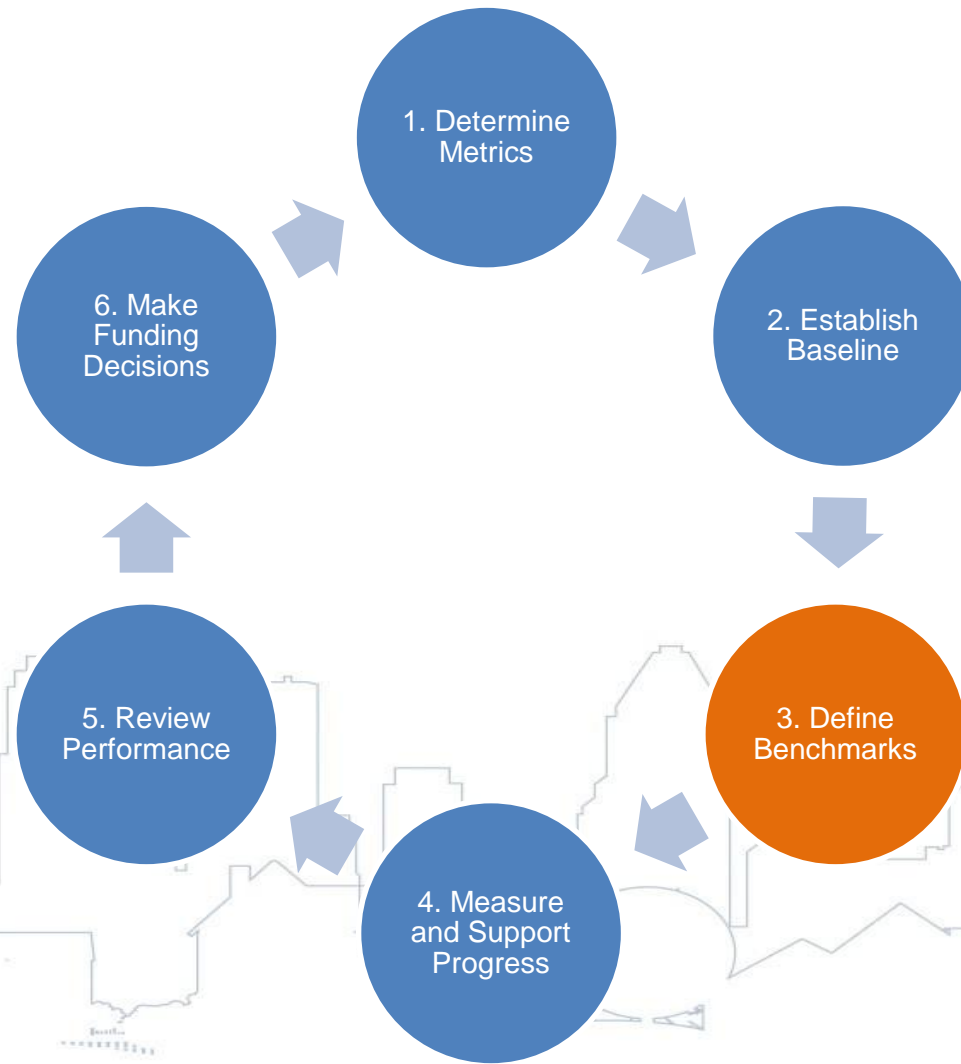
Show of Hands

What data sources are you already using?

- System Performance Measures (SPM)
- Annual Performance Report (APR)
- Consolidated Annual Performance and Evaluation Report (CAPER)
- Point in Time (PIT)
- Housing Inventory Count (HIC)
- Adhoc reports

Any others??

CoC Project Funding Cycle



Establish System-Wide Performance Goals and Benchmarks

Collaborate with community leaders and stakeholders to set goals

Consider local factors to help prioritize the top one or two goals.

Set local performance benchmarks to ensure everyone knows what's expected

Reflect on local changes in performance, priorities for system change, and national benchmarks to identify the right indicators of success.

Check performance targets to ensure they are realistic

System vs. Project Performance Benchmarks

With both System Level and Project Level Data communities can:

1. Set System Level

Targets that generalize across projects

- (85% clients exiting to PH, 80% clients will maintain or increase income)
- Think long term
- Based on best practices

Benchmarks that can be incrementally measured to reach target.

- (exits to PH baseline at 65%, benchmarks set at a 10% increase annually until target is met)
- Think short term

System vs. Project Performance Benchmarks

2. Set Project Level

Targets that are specific to each project type or subpopulation

- (50% chronic clients will maintain or increase income, 80% shelter clients will exit to PH)
- Think long term
- Based on best practice, System Level Targets, and high performers

Benchmarks that drill down to specific project type or subpopulation

- (baseline for chronic clients maintain/increase income at 30%, set benchmark to increase chronic income by 5% quarterly until target is met)
- Think short term

Benchmarks continued

Current performance is known (baseline)

Targets are set

Benchmarks in place

Analyze and Assess!

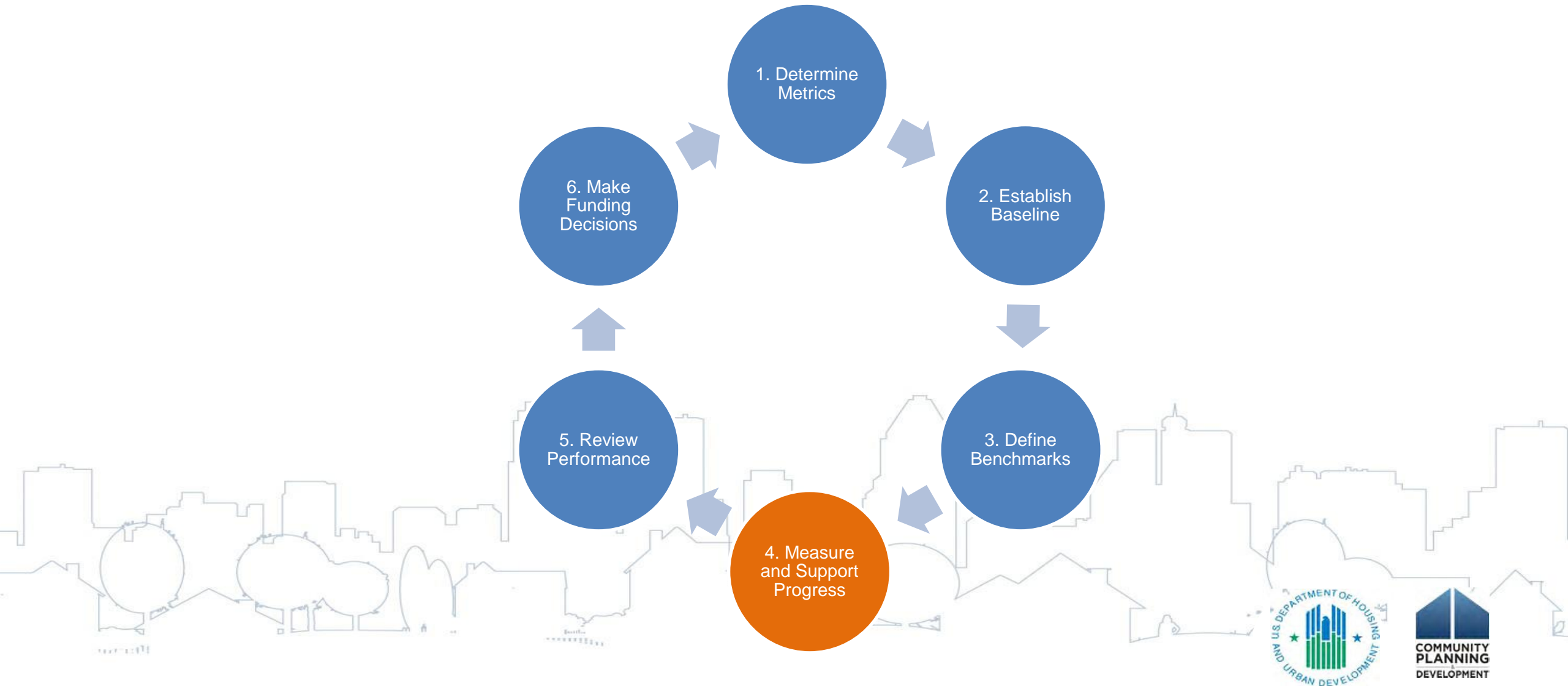
Are we moving toward our goal?

How are we performing?

Is performance increasing or decreasing?

If decreasing, what are we missing and where do we need to pay attention.

CoC Project Funding Cycle



Poll the Audience!

Go to www.menti.com and use the code 36 88 42

Do you currently monitor project performance?

- 1) Yes!
- 2) No
- 3) In the works

Why is continuous review important?

Reviewing performance allows communities to:

- Identify areas of improvement
- Identify existing service gaps
- Course correct
- Make data informed funding decisions
- Understand where to build capacity
- Gauge if resources are being utilized effectively

Monitor and Communicate Performance Year-Round

Analyze on a quarterly or biannual basis to assess progress on goals and benchmarks

Is the support and training having the intended impact

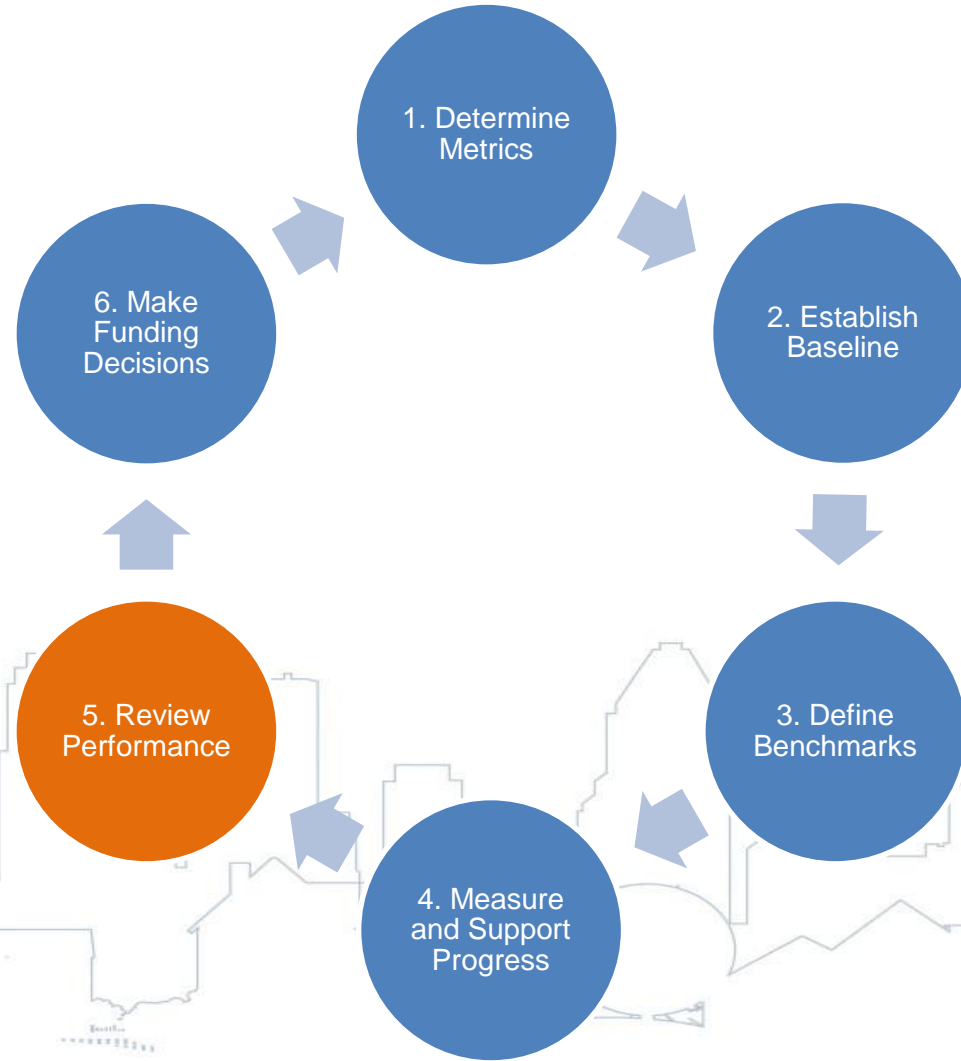
Meet often to discuss findings and revise strategies where required

Communicate performance at regular intervals to give providers an opportunity to use the results to inform practice

Ways to Measure and Support

- Data Monitoring (process for continuous course correction)
- Targeted Trainings and Refreshers
- Feedback Loop (ie: quarterly report to grantees)
- Communities of Practice

CoC Project Funding Cycle



Review Performance: Link to Funding

Review performance as part of funding allocation process

- CoC NOFA application: objective criteria requirement
- Locally controlled funding: best practice

Review Performance: Sources of Information

- HMIS reports: SPM's, APR, CAPER
 - Determine performance period
- Coordinated entry data: time from intake to referral/housing
- Inventory & utilization data
- Gaps analysis/needs assessments
- Funding available and requested

Review Performance: Considerations

- What to include in notice of available funding
 - Baseline data, benchmarks
- What to collect in application
- How to handle new projects with no performance data
- Objective scoring process
 - Blind review
 - Conflict of interest
 - Rubric

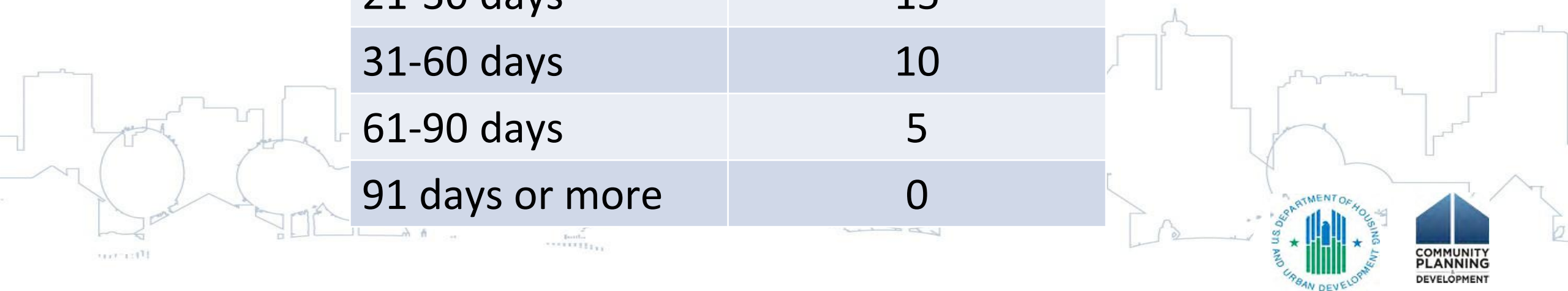
Review Performance: Create a Scoring Rubric

Sample scoring rubric for RRH projects length of stay

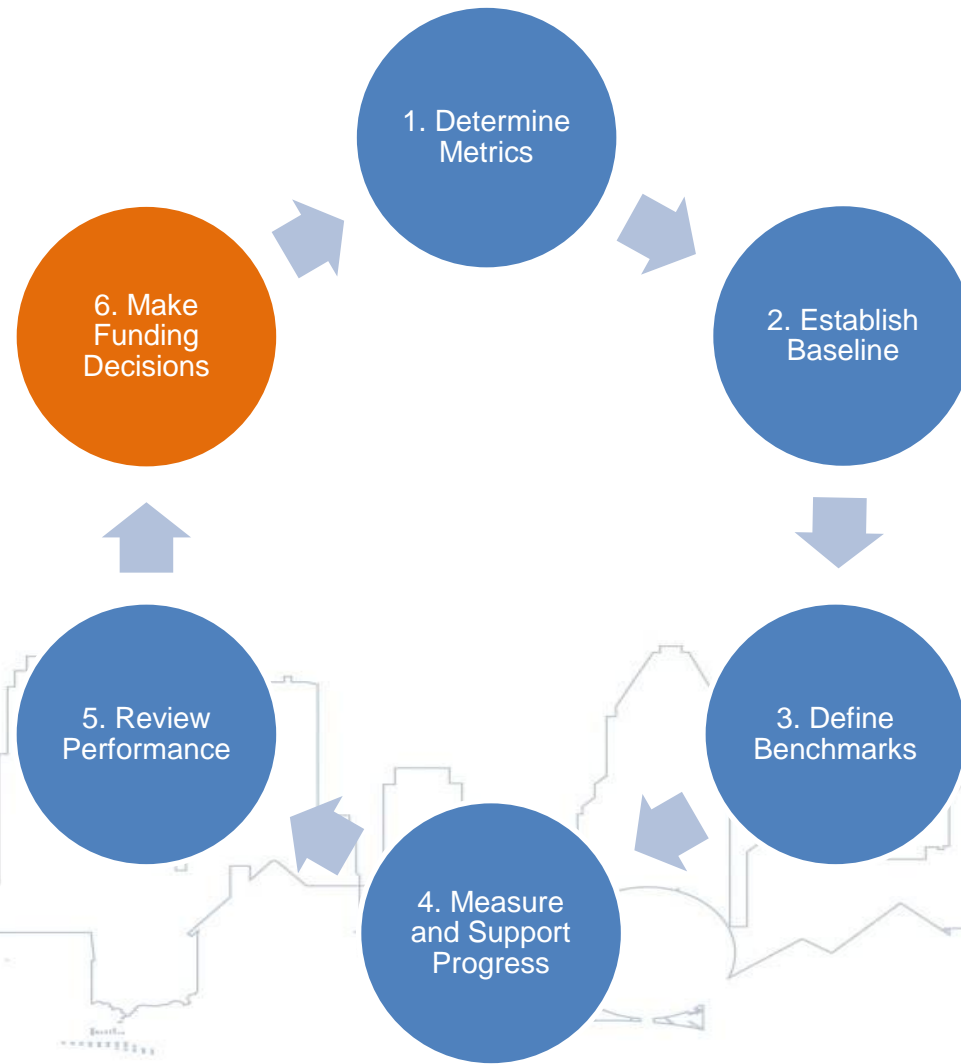
Benchmark = 20 days or less average between project entry and move-in

Maximum points = 20

Average Number of Days	Points
20 days or less	20
21-30 days	15
31-60 days	10
61-90 days	5
91 days or more	0



CoC Project Funding Cycle



Allocation/Reallocation: Key Players

- CoC Governing Board
- Ranking and Review Committee
- Data or monitoring/evaluation committee
- HMIS Lead Agency
- Provider Agencies

Allocation/Reallocation: Considerations

- Project performance, but that's not all!
- Inventory needs – how much of what type of unit (system modeling tools can help)
- All system resources – what other funds can and cannot do
- Short and long-term needs, “surge” efforts, etc.
- Local priorities, populations and subpopulations



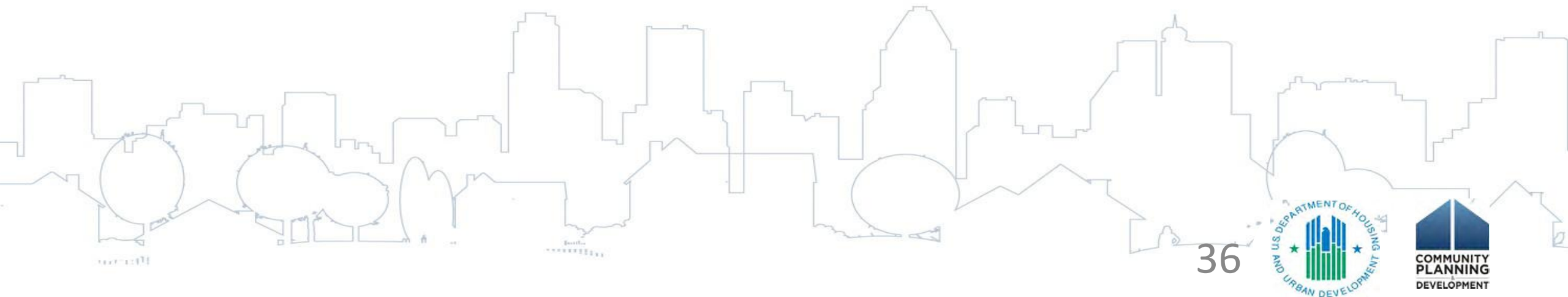
**Develop a Rating and
Ranking Process!**

Allocation/Reallocation: Local Priorities

- Frequent users of emergency services
- Youth exiting foster care
- Homeless veteran households
- Chronic homeless households
- Households that can be served with prevention strategies
- Goals of the CoC's strategic plan
- Others?

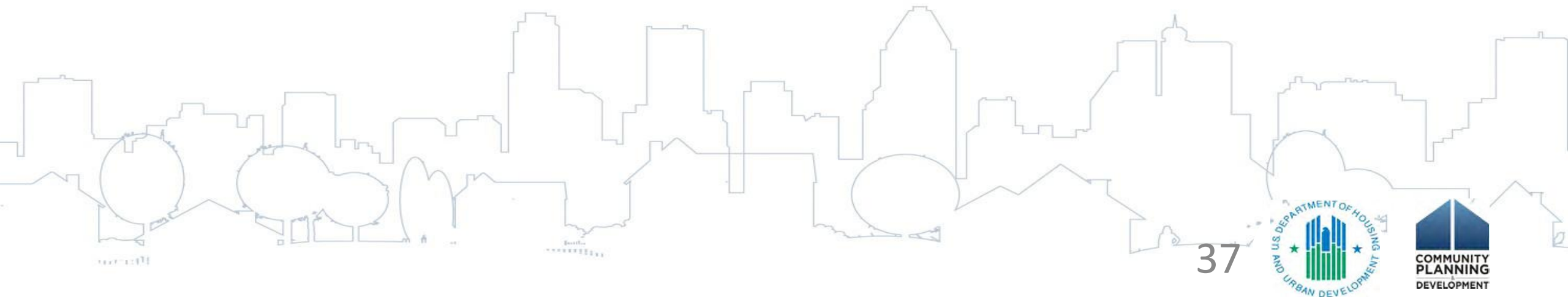
Reallocation: Technical Challenges

- Incomplete or low-quality data
- HMIS coverage or participation rates
- Identifying unmet need



Reallocation: Adaptive Challenges

- Provider political or personal connections
- Weak CoC Board or management structure
- Political will
- Change is hard!



Data-Informed Funding Cycle with the CoC Rating and Ranking Tool



Poll the Audience!

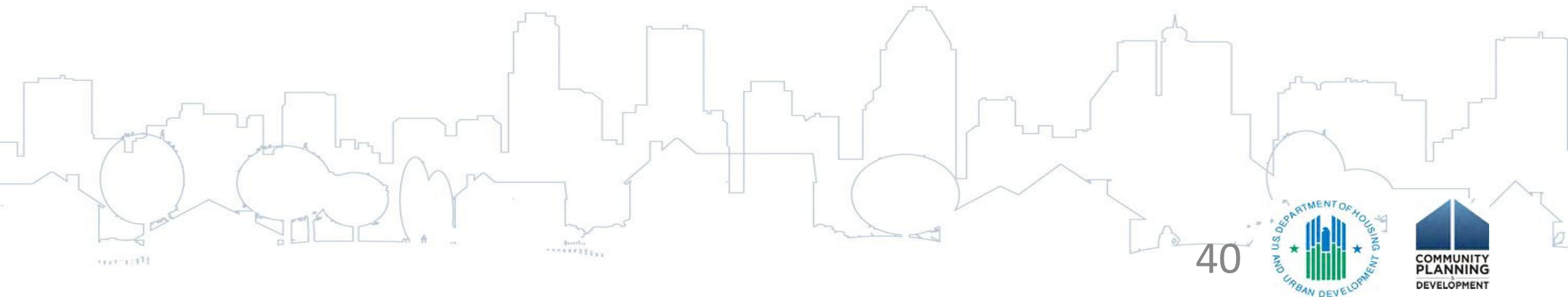
Go to www.menti.com and use the code 36 88 42

Has your community used HUD's Rating and Ranking Tool?

- 1) Yes! We use it now
- 2) Yes...but we need pointers
- 3) No, we use another tool
- 4) No, but we've reviewed it
- 5) Never heard of it, sorry

Rating and Ranking Tool: Rating

Rating is the process of scoring projects based on standardized criteria. Projects are generally scored relative to other projects of the same type.



Rating and Ranking Tool: Ranking

Ranking is the process of using system priorities and performance rating to determine the order of projects for a funding application or other purposes.

The ranking process begins with setting funding priorities for a specific funding source, identifying priority level and number of units needed for:

- Populations
- Project Types

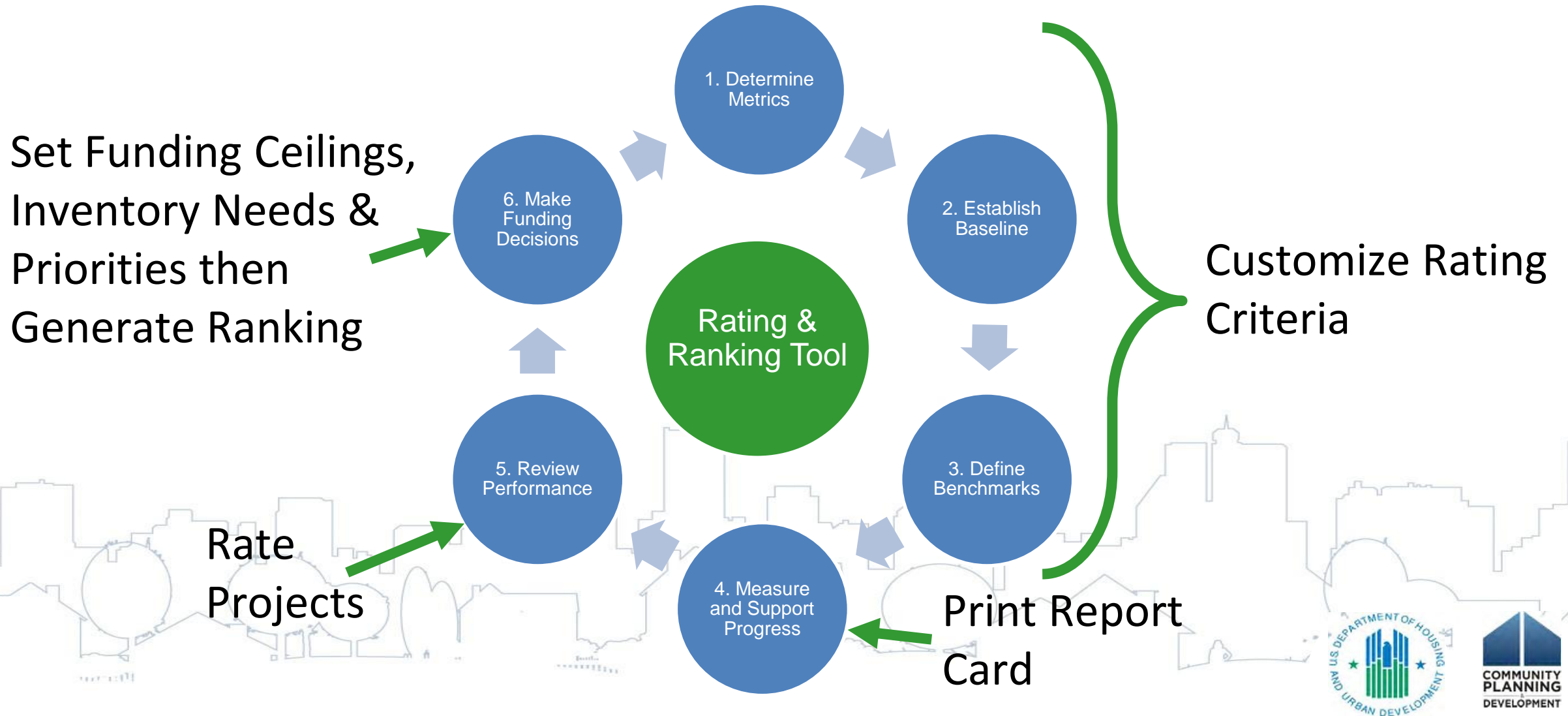
Using performance rating scores, projects are ranked in order to best meet the priorities with the available funding.

Cool Tool, but can it...?

- Set different scoring criteria for each project type?
- Include additional scoring criteria of threshold requirements developed locally?
- Be used even if we already have a process for scoring, but need help with ranking?
- Be used for new projects to provide performance data?
- Set limits on how much funding is spent on specific project types or populations?
- Include local priorities in the process?
- Print a hard copy of the scoring tool for my meeting?

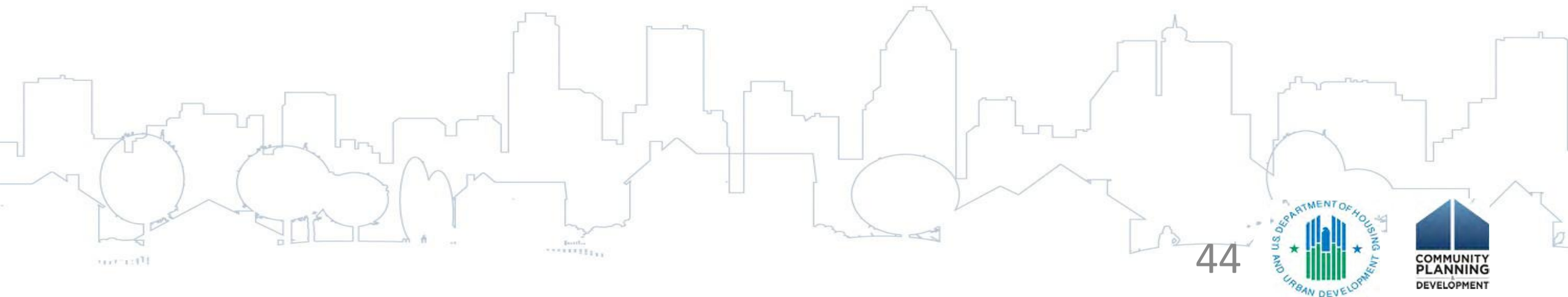
YES

Data-Informed Funding Cycle with the CoC Rating and Ranking Tool



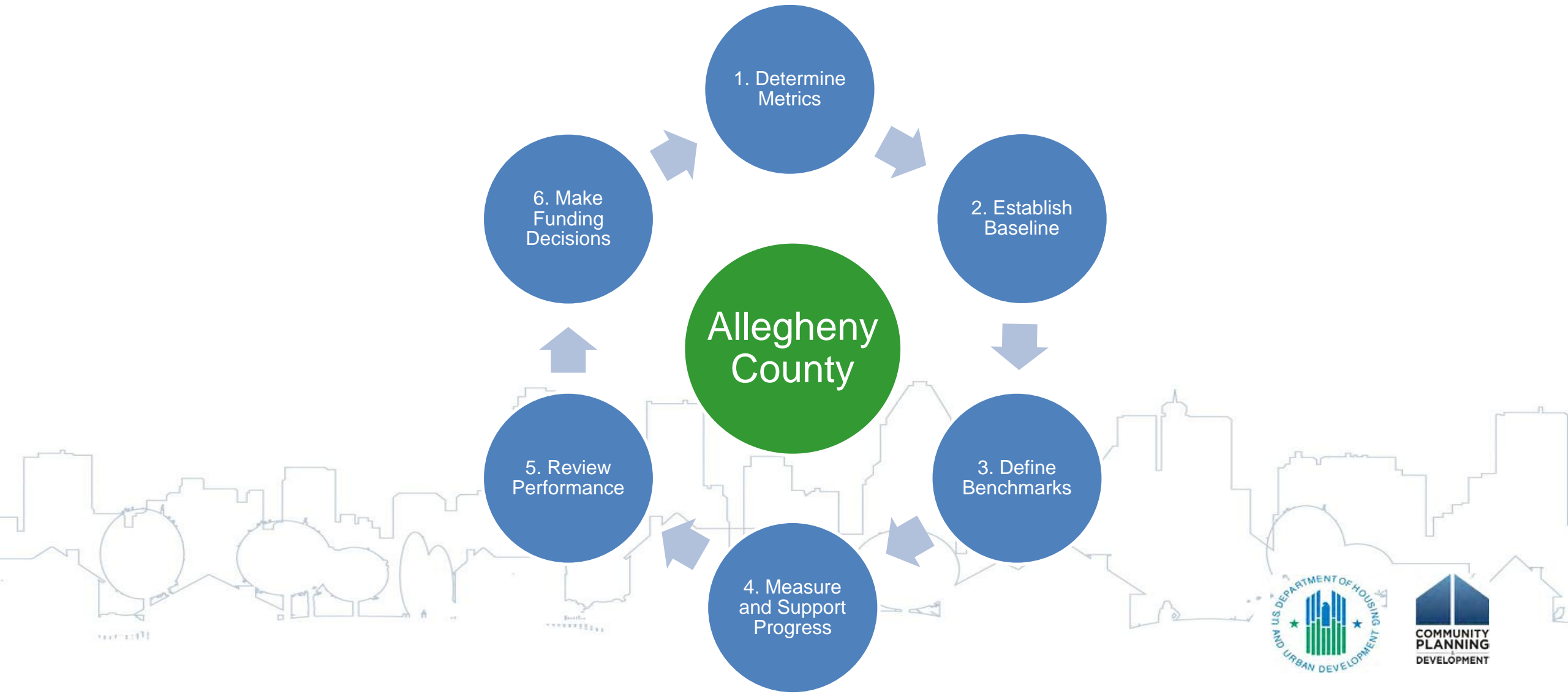
Rating and Ranking Tool: Demo

Live Demo!



Data-Informed Funding Cycle

Community Example: Allegheny County



Community Example: Allegheny County

Allegheny County's Project Scoring and Ranking Process

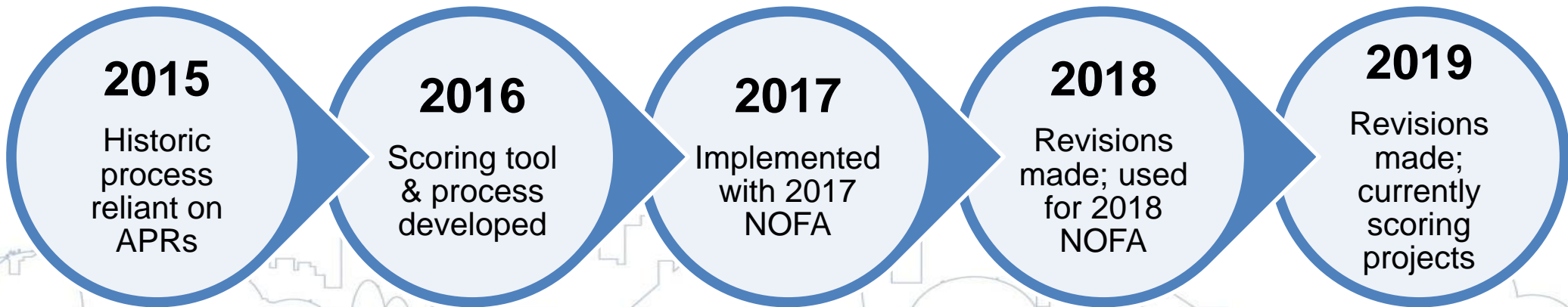
Andy Halfhill

Manager of Homelessness and Housing Analytics
Allegheny County Department of Human Services
Pittsburgh, PA



Allegheny County Project Scoring and Ranking Process

- Our CoC has implemented an improved process for evaluating, scoring and ranking CoC projects
- Project scoring uses HMIS data + project monitoring reports + fiscal performance data; have piloted consumer satisfaction surveys for future use



Allegheny County Project Scoring and Ranking Process

Current performance metrics include:

- Unit utilization
- Exits to/retention of permanent housing
- Serving clients with more severe need/vulnerability
- Income/employment/non-cash benefits/health insurance
- Length of stay in program
- Length of time from program enrollment to move-in
- Recidivism
- Data quality completeness, data quality timeliness
- Fiscal performance (funds expenditure, accuracy of billing)
- Cost effectiveness
- Housing First compliance and program monitoring performance



Scoring Tool section examples

Allegheny County Continuum of Care Evaluation 2019 Renewal Application Project Performance Outcomes

Agency: Housing Inc.

Project Name: Finding a Home

Evaluation Data Review Period: 1/1/2018 to 12/31/2018

Total HUD 2017 Grant Award: \$ 100,000.00

Type of Program: Permanent Supportive Housing

Housing Programs: No. of Units 10 No. of Beds 20

Subpopulation Target A Served: Single Adults & Families Subpopulation Target B Served:

Summary of Persons Served during Evaluation Period:

	Households without Children		Households with Children	
	Number of Households without Children		Number of Households with Children	
Total Households Served :	10		3	
	Adults	10	Adults	3
Total Persons Served:			Children	7
	Leavers		Stayers	
	Leavers		Stayers	
Total Persons:	10		10	
Households:	Exiting Households	3	Households Staying	10
Total Adults:	Exiting	3	Staying	10

b. Housing Performance	Specific Measure by Program Type	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
RRH: Consumers exiting to any HUD-defined PH option	12	80%	3	3	9	12%	5 = 100% 4 = 85 - 99% 3 = 75 - 84% 2 = 60 - 74% 1 = 25 - 59% 0 = or <24%
PSH: Consumers remaining in PSH or exiting to any HUD-defined PH option		0%		4	0	0	

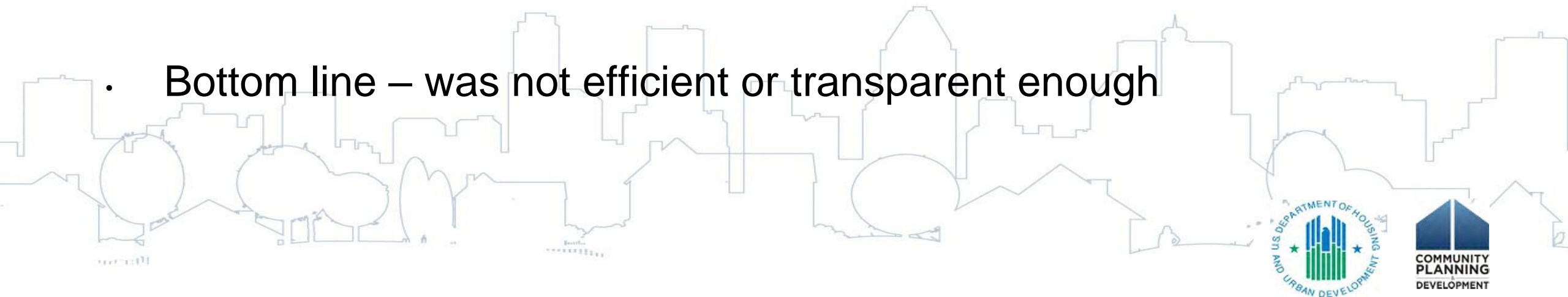
d.RRH Length of Time	Specific Measure by Program Type	% of Total Served	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Average Length of time from program enrollment to move in date (30 days)	42	N/A	3	1	3	4%	5 = < or = to 30 days 4 = 31 - 40 days 3 = 41 - 50 days 2 = 51 - 60 days 1 = 61 - 70 days 0 = greater than 71 days
Rapid Rehousing: Consumers staying or exiting program in 12 months or less	20	57%	1	2	2	2%	5 = 95% & above 4 = 90% - 94% 3 = 75% - 89% 2 = 60% - 74% 1 = 45% - 59% 0 = 44% & below

h. Data Quality: Timeliness	PSH/RRH Number of Records 3 days or less for Exits PSH=Annals 60 day window	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Data Quality: PSH Exits	10	100%	5	1	5	7%	5 = 100% 4 = 85 - 99% 3 = 70 - 84% 2 = 55 - 69% 1 = 44% - 45% 0 = 44% or <
Data Quality: PSH Annual	9	90%	4	1	4	5%	

h. Data Quality: Timeliness	PSH/RRH Number of Records 3 days or less for Exits PSH=Annals 60 day window	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Data Quality:RRH Entry	30	88%	4	0.5	2	2%	5 = 100% 4 = 85 - 99% 3 = 70 - 84% 2 = 55 - 69% 1 = 54% - 45% 0 = 44% or <
Data Quality:RRH Exit	10	100%	5	0.5	2.5	3%	

Why did our CoC develop this process?

- Old process relied solely on APR data
- Scoring process was especially cumbersome evaluators who were not familiar with APRs
- It had become too subjective and influenced by service provider comments
- Bottom line – was not efficient or transparent enough



How did our CoC change its process?

- CoC has an Analysis and Planning Committee to review data and inform CoC planning efforts
- Analysis and Planning Committee is comprised of service provider staff, CoC lead (DHS) staff, funders and other stakeholders (~40 attendees); meets monthly
- Review of previous year evaluation process + maturing CoC data capacity led to decision to revamp the process
- Discussion spanned several months of meetings to build **consensus** around which metrics to include, how to score metrics, how to handle newer/partial year projects, how to incorporate provider/client issues into evaluation process, etc.



What scoring process looks like now

- DHS (CoC lead) analyzes previous year scoring to determine need for changes to project scoring rubric, if any
- Analysis and Planning Committee discusses and finds **consensus** on other changes (i.e. metrics to add, remove or modify)
- DHS data analytics staff participate to inform decision making about data availability, data quality, etc.
- Analysis and Planning Committee makes recommendation to CoC board; CoC board votes on updated scoring tools/process after time for public comment
- DHS staff update scoring tool and dashboards to reflect changes and complete project scoring; DHS staff update and release calculations guide



CoC scoring adjustments over the years

Measure	2017 RRH/PSH	2018 RRH	2018 PSH	2019 RRH	2019 PSH
Unit utilization (Jan, April, July, Oct.)	15	15	15	15	15
Housing performance (exit destinations)	15	15	20	15	20
Income/Employment/Health Insurance/Benefits (increase or maintain)	15	15	15	15	15
Project serving hard to serve clients		bonus, up to 4		12	12
Length of Time in Program	5	10	0	10	0
Length of time from program enrollment to move in		5	5	5	5
Recidivism (exit to perm dest, return w/in 6 mo)	5	5	5	5	5
Data Quality - Completeness	15	5	5	5	5
Data Quality - Timeliness (Entry)		5	0	2.5	5
Data Quality - Timeliness (Exits/Annuals)		0	10	2.5	5
Fiscal (expended all funds; accuracy of billings)	10	10	10	10	10
Cost effectiveness (per unit; per successful outcome)	10	10	5	5	5
Housing first monitoring	10	5	5	10	10
Monitoring - file completeness		5	5		
Monitoring - program serving the right clients (chronic, etc.)		0	5		
TOTAL POINTS	100	105	105	112	112



What has been the impact of these changes?

- A more efficient, data-driven process for all involved
- Improved transparency and understanding of project rating and ranking process
- Improved understanding among service providers about project level performance, and how it impacts system level performance
- Shared understanding within CoC of performance goals for CoC, which has led to future work on CoC performance planning and reporting
- More data driven identification of underperformers....as well as improved understanding for funders of challenges that providers face
- CoC lead investing in data quality support for service providers (data monitor)
- Improved data maturity for the CoC



15% Solutions Activity



15% Solutions Activity

What can you do now to support data driven funding in your homeless system?

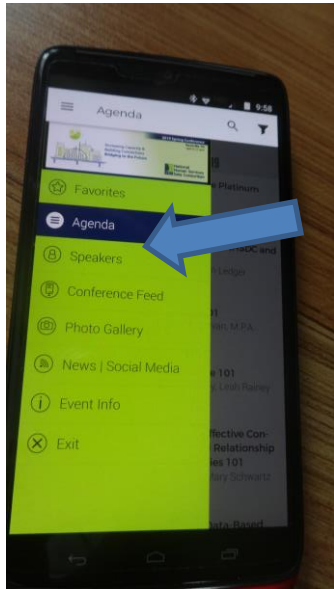
- Where do you have discretion and freedom to act?
- Which part of the cycle can you influence?

Without extra resources/authority

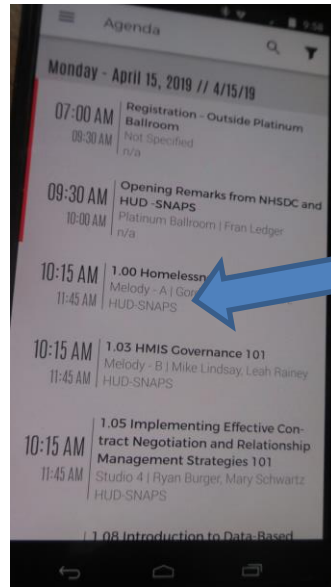


Evaluate This Session on Your Conference App! (It takes 5 minutes to complete)

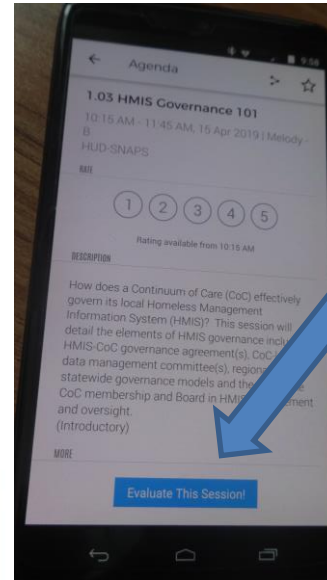
1) Select “Agenda” from the navigation menu.



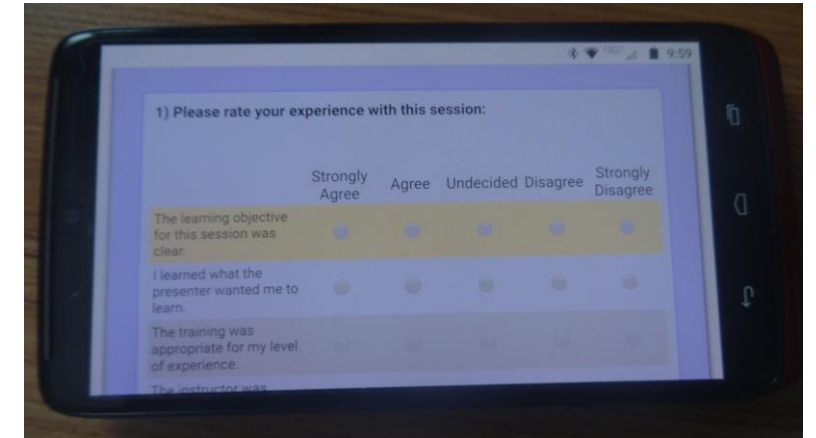
2) Select the name of the session.



3) Select the blue “Evaluate This Session”.



4) Complete the Evaluation and Select “Finish”.



TIP:
Turn your phone horizontally to see rating options.

HUD Certificate-of-Completion

Reminder: HUD is offering a Certificate-of-Completion for completing at least 4 sessions within either track:

- 1) HMIS Fundamentals Track
- 2) System Planning with Data Track

To earn credit for completion of this session, please complete the evaluation on the conference app and include contact details when prompted

HUD Certificate-of-Completion

HMIS Fundamentals Track

- HMIS Governance 101
- HMIS Lead Monitoring
- HMIS Project Monitoring
- Implementing Effective Contract Negotiation and Relationship Management Strategies 101
- HMIS Project Set Up 101
- HMIS Project Set Up 201
- Understanding the Interconnectedness of HMIS Data
- Achieving a Quality and Stable HMIS Staffing Pattern
- HMIS Project Management and Annual Calendar of Expectations

System Planning with Data Track

- Orientation to the Stella Performance Module
- System Modeling 101
- System Performance Improvement: Part 1 – Analyzing Performance
- System Performance Improvement: Part 2 – Developing Strategies
- Overview of System Performance Measures and Reports
- **Using Data in Funding Decisions**
- System Performance by Subpopulation and Geography