

# Steering & Oversight Committee

April 15, 2025  
Multnomah Building



**Homelessness  
Response  
System**



# HRS SOC Quorum

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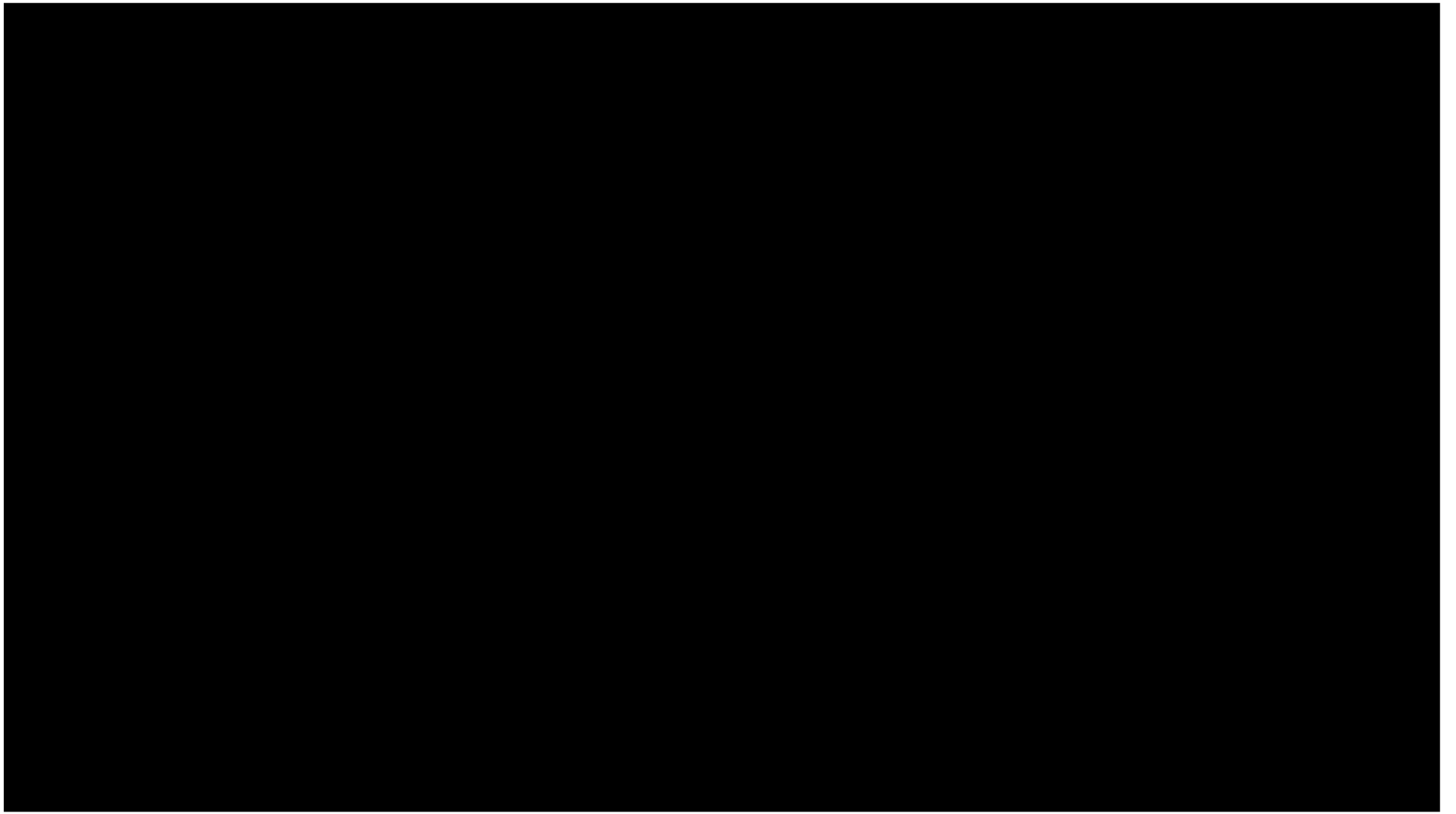
- A quorum exists for purposes of voting when four (4) voting members and three (3) non-voting members are present.



# Agenda

Agenda Item	Time	SOC Actions
City & County Budget Status <ul style="list-style-type: none"><li>Update from Chair Vega Pederson &amp; Mayor Wilson on respective budget processes and priorities</li></ul>	10 min	
Presentation: Data Context <ul style="list-style-type: none"><li>ECONorthwest presenting recent analysis related to Metro's Supportive Housing Services funds and relevant context</li></ul>	30 min	
Presentation: Data Improvement Plan <ul style="list-style-type: none"><li>Homeless Services Department presents updated data</li></ul>	45 min	
Questions & Discussion <ul style="list-style-type: none"><li>Next steps in data work</li><li>Key Performance Indicators development process</li><li>Education and training related to By Name List</li></ul>	20 min	<b>Discussion</b>







# Contextualizing the Regional Homeless Services Measure

APRIL 2025



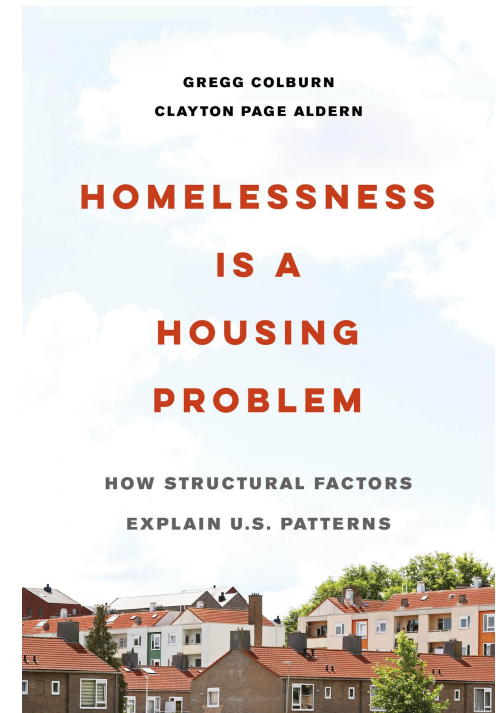
## Presentation overview

1. Unpacking the factors that influence homelessness
2. SHS goals and objectives
3. Tracking progress
4. Revenue picture
5. Housing market indicators
6. Key takeaways

# Unpacking the factors that influence homelessness

# Homelessness is a housing problem

*The motivation for this book stemmed from the author's observations that the roots of the homelessness crisis in many cities in the U.S. were being misdiagnosed, often to frustrating and harmful ends. A public focus on mental health and drugs—certainly, important risk factors for homelessness—dominates narratives in the Puget Sound region, thereby narrowing the policy conversation. In discussions with stakeholders throughout the region, it became apparent that an intense focus on behavioral health might be masking a more important root cause of the crises: **housing market conditions***

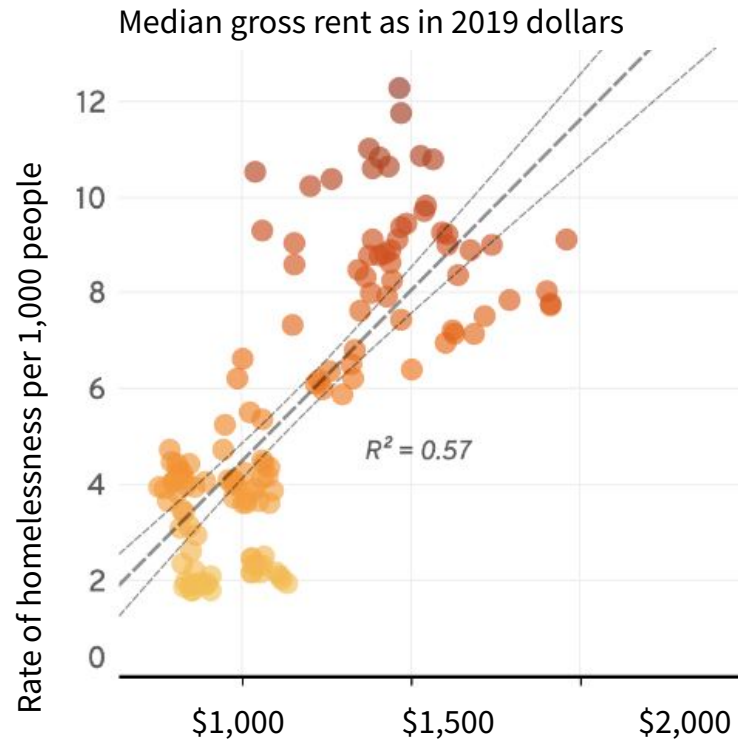


Source: Colburn, Gregg and Clayton Aldern. Homelessness is a Housing Problem. 2022. University of California Press.



## More than half of the rate of homelessness can be explained by rent level

A 2020 GAO report found that a \$100 increase in a region's median rent correlates to a 9% increase in its rate of homelessness.



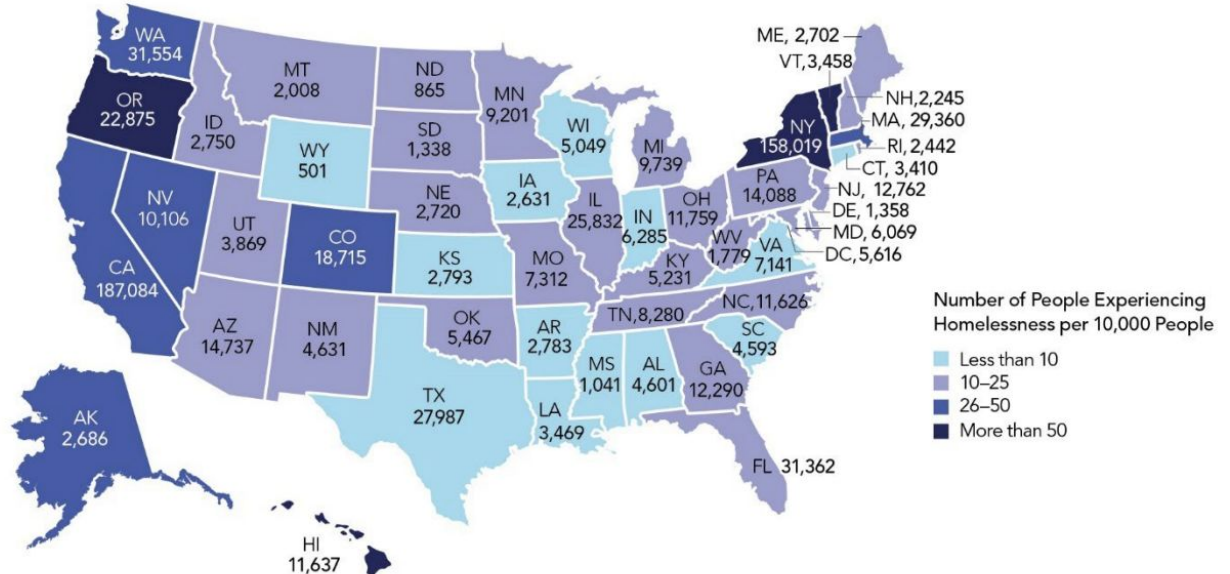
# Factors that are largely unrelated to the homelessness rate

Community rates of

- Serious mental illness
- Illicit drug abuse
- Substance use disorder
- January temperature
- Poverty rate
- SNAP or SSI caseloads

Are **not correlated** with higher rates of homelessness

State level estimates of people experiencing homelessness in 2024



# SHS goals and objectives

## SHS in the voter pamphlet

This measure will authorize Metro to establish a regional supportive housing funding program, providing the resources to address unmet housing needs of people experiencing or at risk of experiencing long term or frequent episodes of homelessness in the greater Portland region. The measure will result in a substantial increase in the delivery of supportive housing services.



Home > Public projects > Supportive housing services

# Supportive housing services: Addressing homelessness in greater Portland

Ten-year regional goals for the fund are:

- Connect at least 5,000 households experiencing homelessness to permanent supportive housing
- Stabilize at least 10,000 households at risk of or experiencing homelessness in permanent housing

SHS funds may be used for services that support these goals, such as outreach, shelter, housing search navigation and employment programs.

# Tracking progress

**Totals (all counties)**



**7,247**

households placed  
in housing



**17,048**

eviction  
preventions

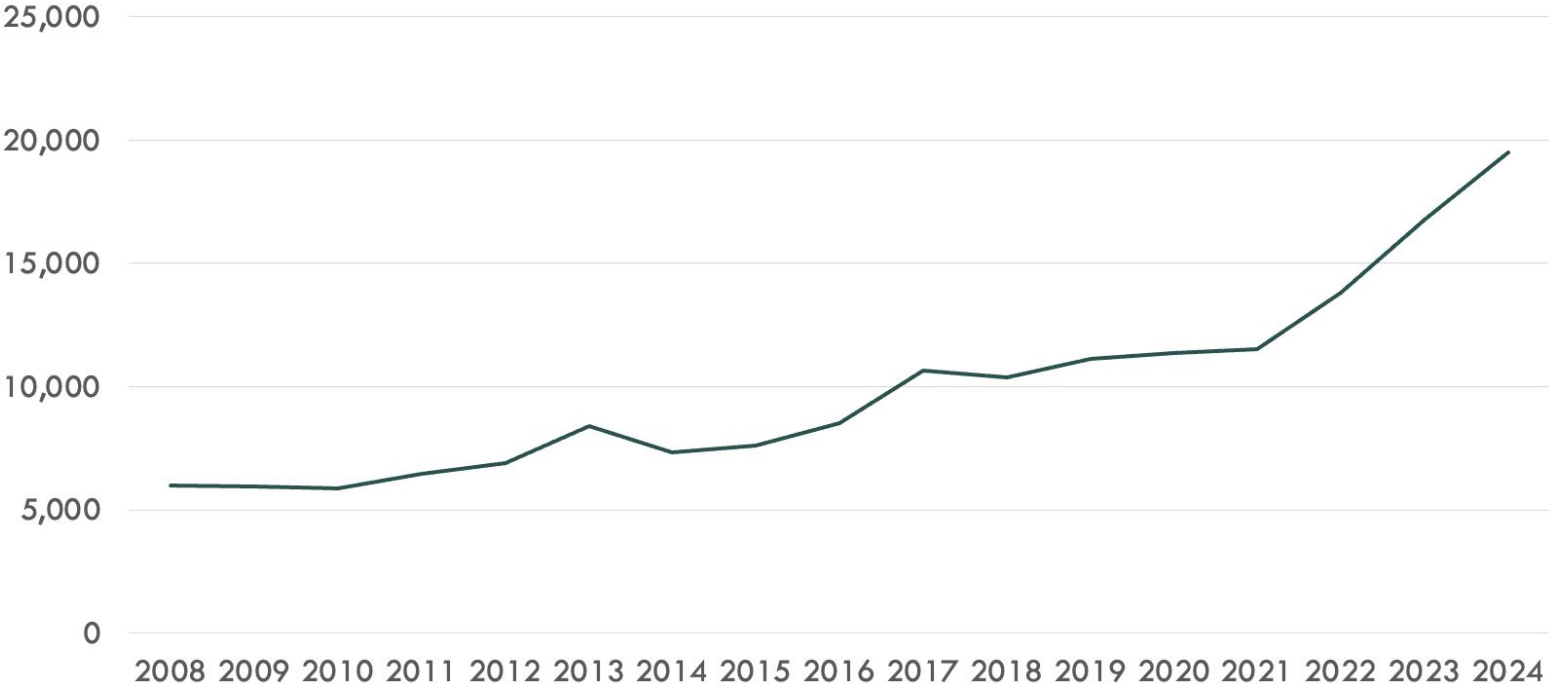


**2,568**

shelter units created  
or sustained

Source: Metro SHS website, accessed March 14, 2025

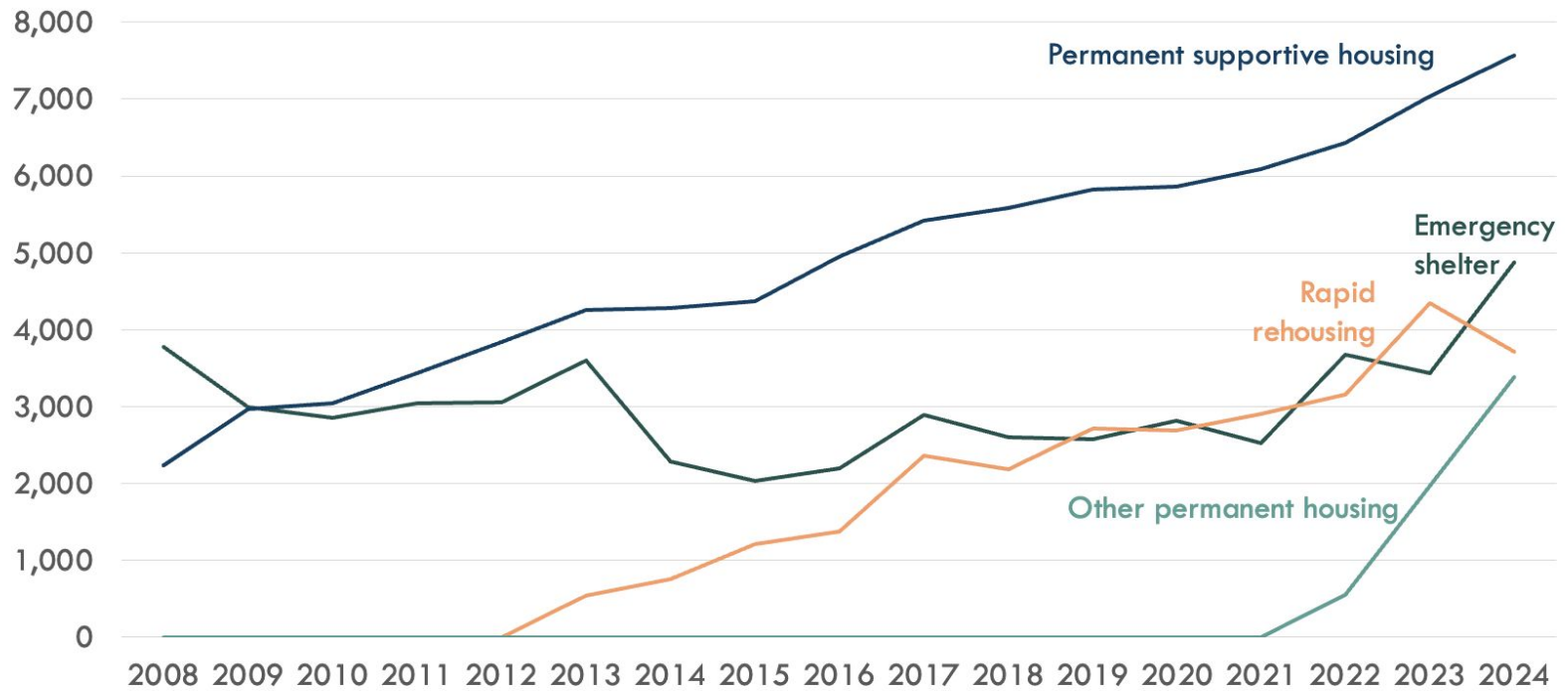
**Housing Inventory Count, Total Year Round Beds All Categories,  
Tri-County Portland, 2008-2024**



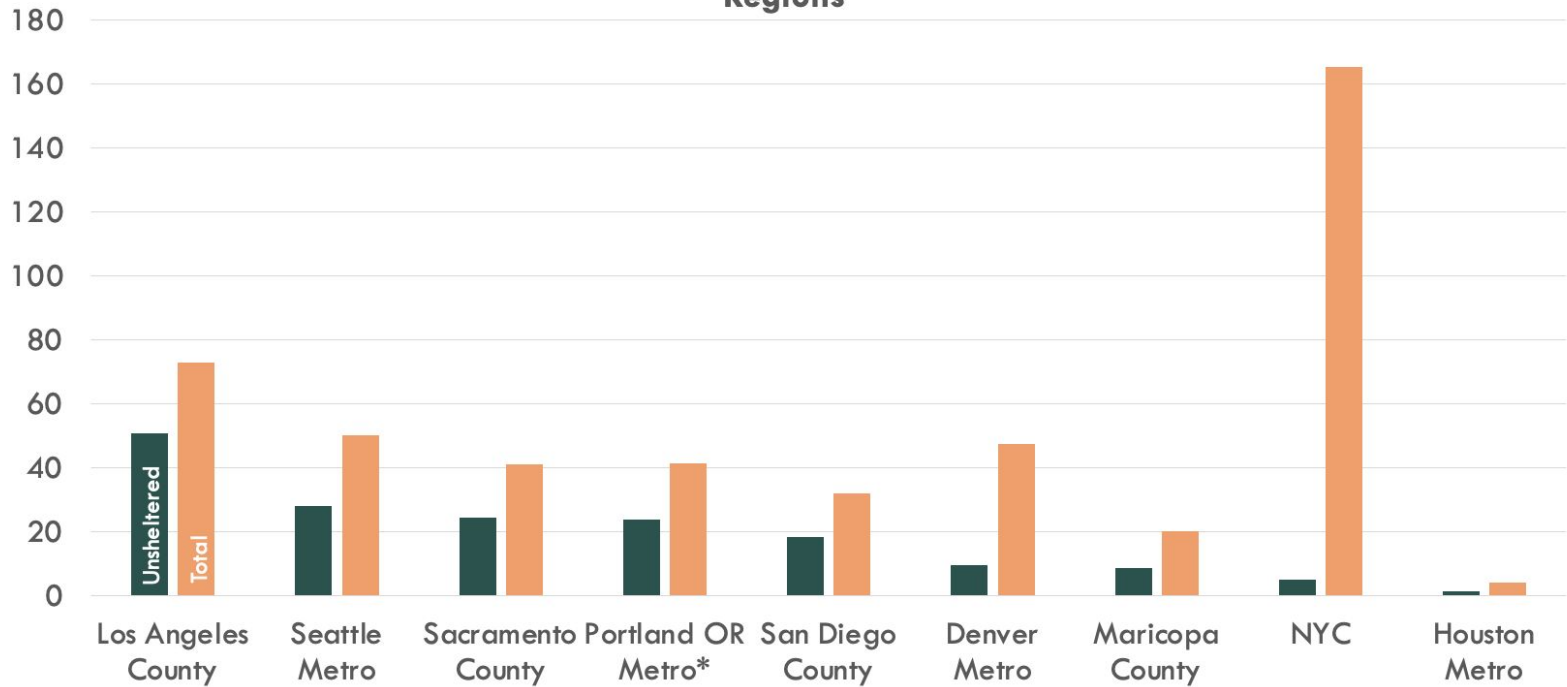
Source: U.S. HUD



### Housing Inventory Count, Total Year Round Beds, By Category, Tri-County Portland, 2008-2024



### Total and Unsheltered Homelessness per 10,000 Residents, 2024\*, Selected U.S. Regions



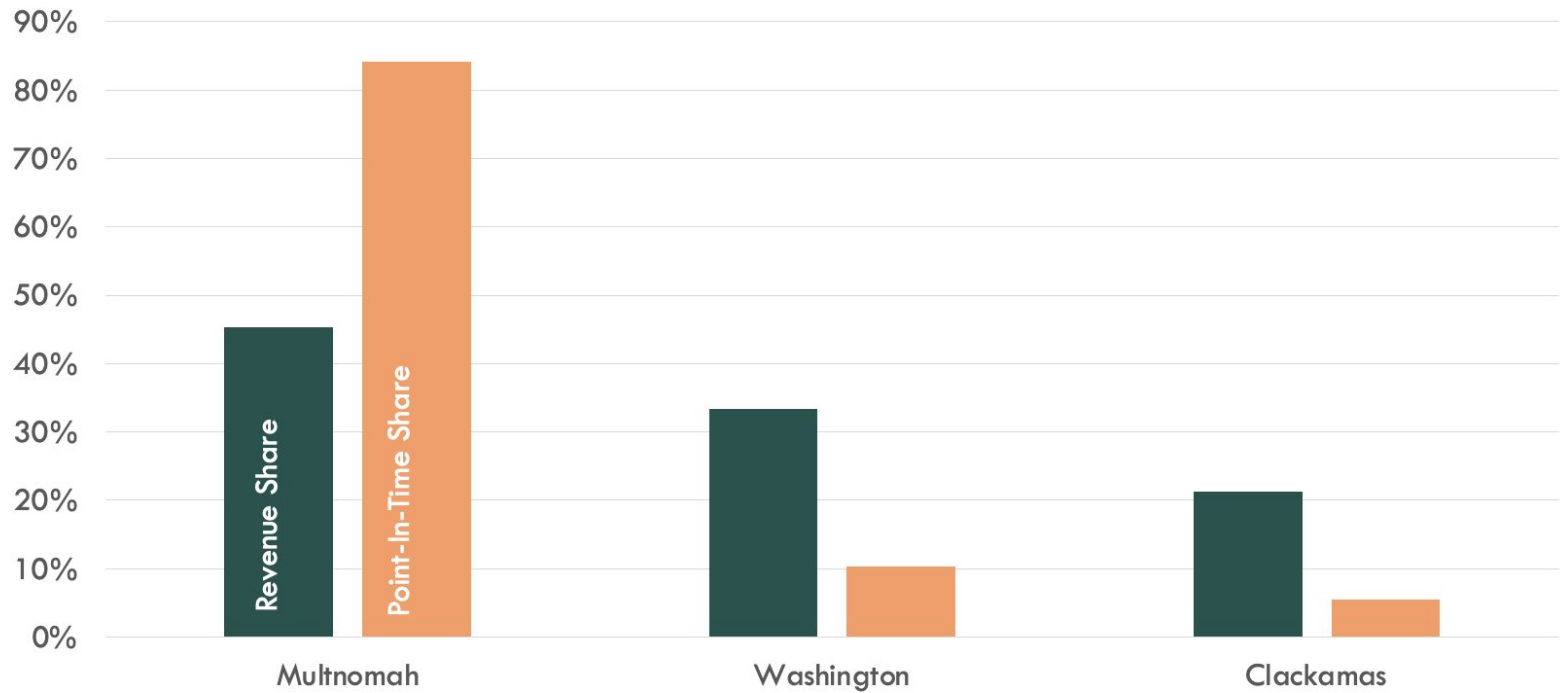
Source: U.S. HUD and U.S. Census, \*Portland Metro data are 2023

# Revenue picture

# Revenue

Supportive housing services will be funded by a marginal personal income tax of 1% on households with taxable income over \$200,000 (or taxable income over \$125,000 for individual tax filers) and a business profits tax of 1% with an exemption for small businesses that have gross receipts of \$5 million or less per year. The personal income tax will be assessed on residents of the Metro district, and on non-residents who have income earned from sources within the district. Only income above \$200,000 (\$125,000 individual) is taxed.

### Shares of SHS Revenue and Point-In-Time Homeless Count, Tri-County Portland Oregon



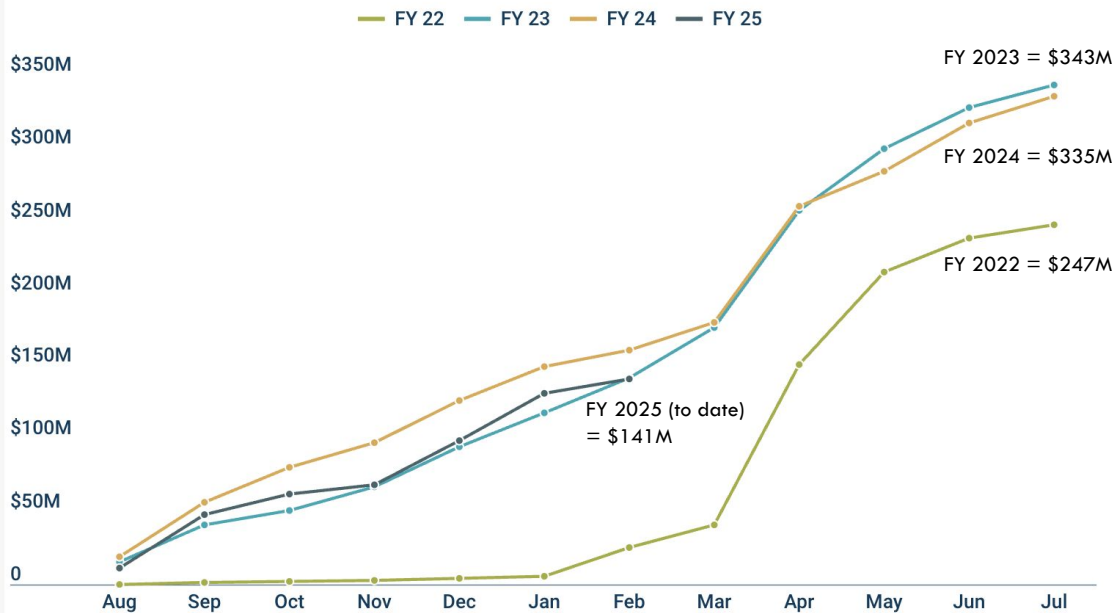
## Spending by Source, FY 2023 – shares expected to change in 2024

Source	Amount	Percent
Regional SHS	\$144,366,467	27%
Federal	\$109,342,393	21%
ARPA	\$88,747,726	17%
Cities	\$78,331,870	15%
Counties	\$61,665,139	12%
Philanthropic	\$37,910,567	7%
State	\$10,667,544	2%
<b>Total</b>	<b>\$531,031,706</b>	<b>100%</b>

\*Eight non-profit organizations accounted for two thirds (\$24.9 million) of the philanthropic expenditures

# Supportive Housing Services Tax Revenue Collection

Cumulative Collections from August 2021 through February 2025



This chart shows **cumulative** revenue collections by fiscal year. With only 3.5 full years of collections, there is limited history and points of comparison.

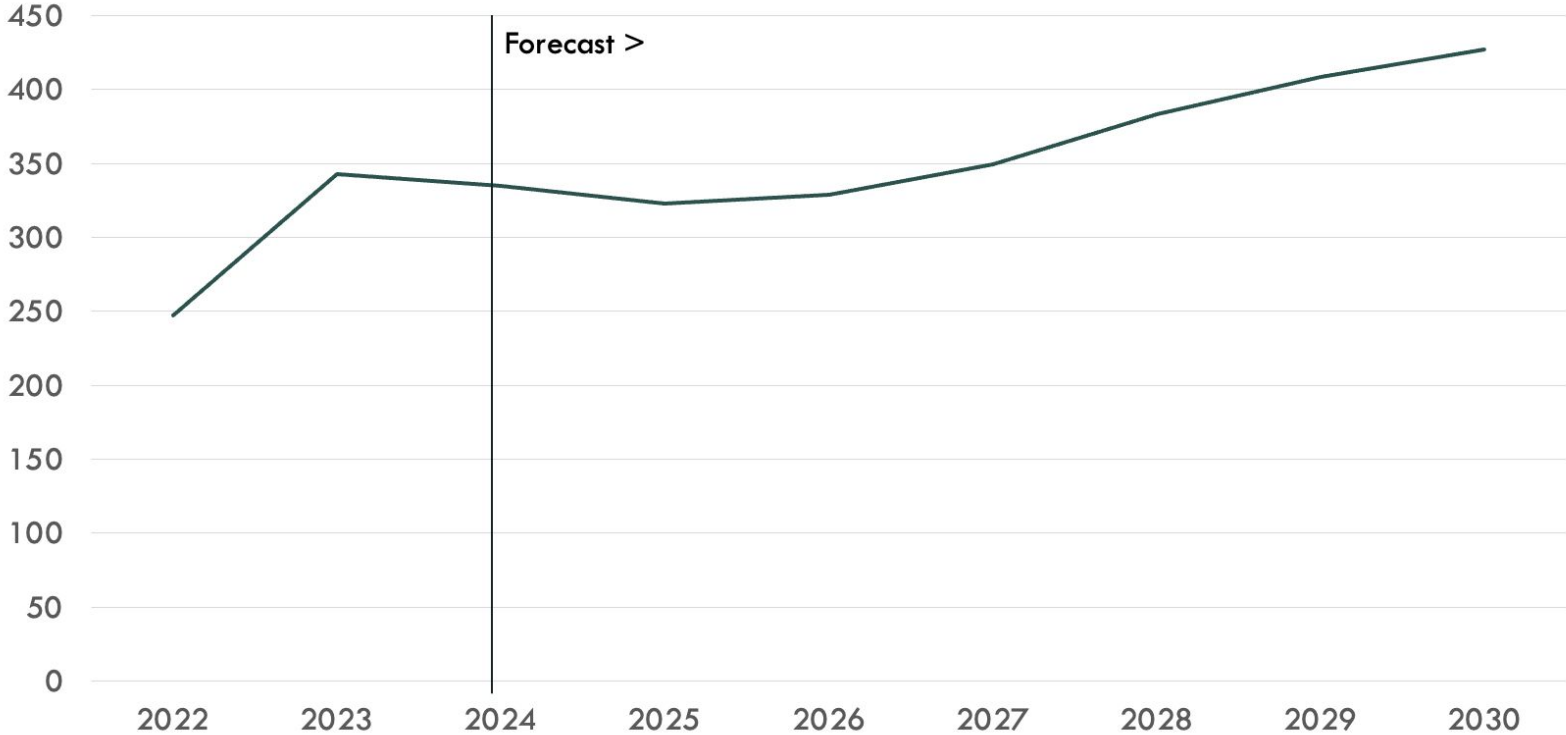
In FY 2024-25 so far, revenue is trending lower than the prior year. However, the majority of revenue is collected in April and May, meaning that the revenue trajectory can shift significantly very late in the fiscal year.

*Additional analysis and forecast materials are available [here](#).*

These figures represent tax collections only, not including interest or other adjustments.

Metro updated its revenue recognition process in Summer 2023 to align with accrual accounting. As such, this chart shows historical collections with August as the first month of the fiscal year, since that reflects income earned in July.

**SHS Tax Collections Actual and Projected, In Millions of Dollars Unadjusted for Inflation**



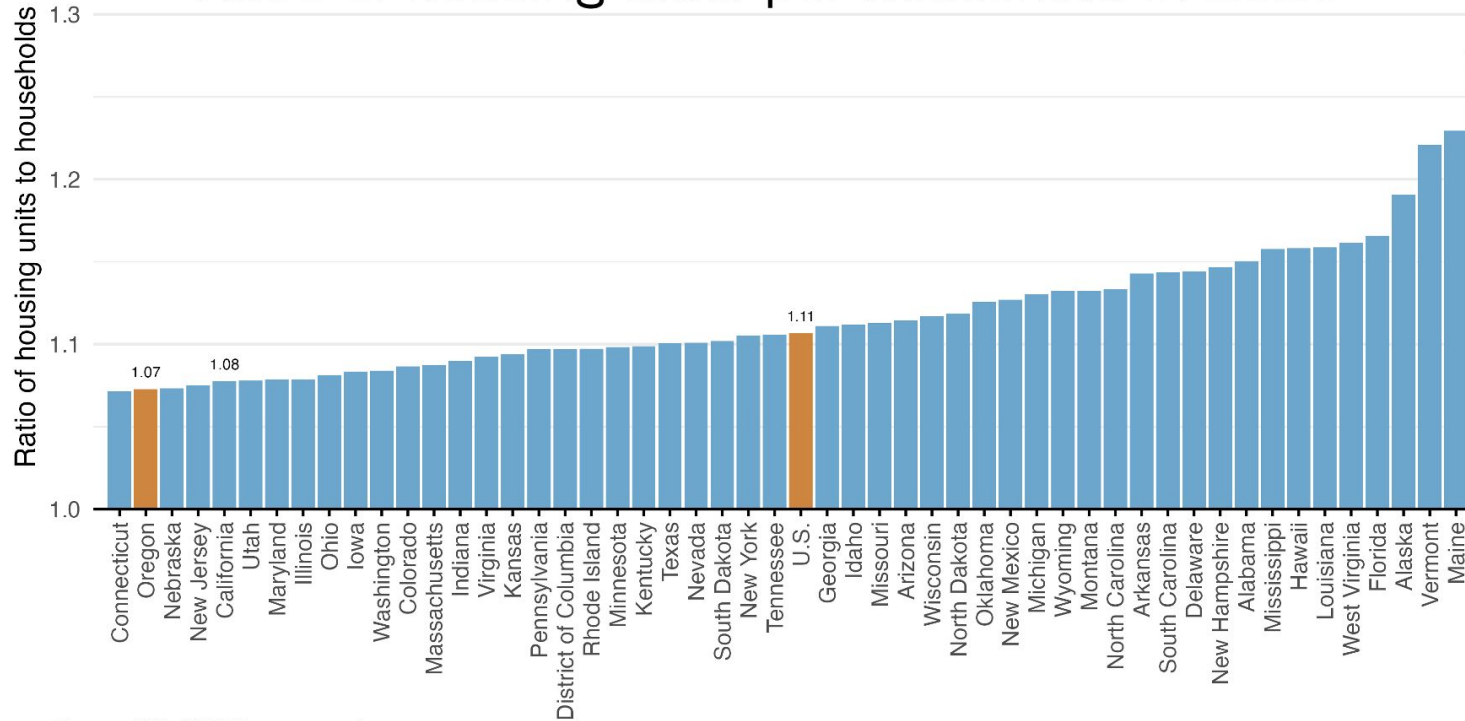
Source: Metro



# Housing market indicators

# Oregon has the 2nd most constrained housing market in the country

## Ratio of housing units per household in 2023



Source: Census ACS, 2023 1-year sample

# Limited pockets of housing affordability in 2019

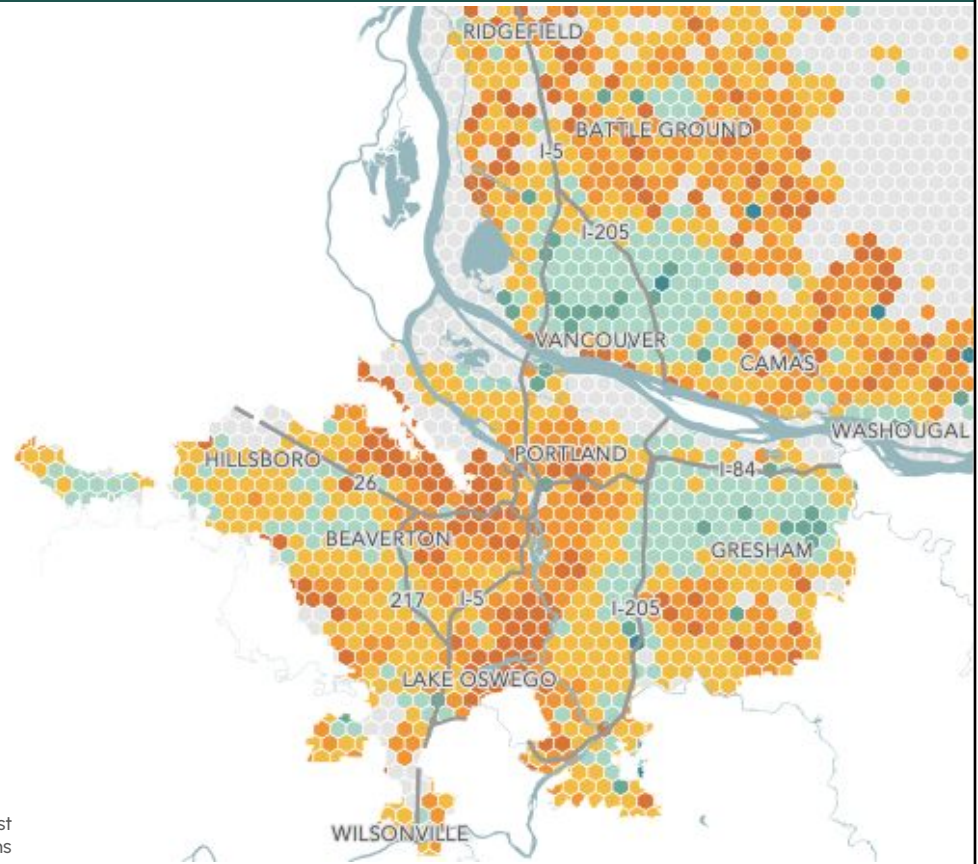
## Assuming:

20% down payment

4% mortgage rates

Median Family Income of **\$89,700**

### Percent of Income Spent on Housing



Source: Metro RLIS, Clark County Assessor, Freddie Mac, ECNorthwest calculations

# 2024 housing unaffordable to purchase in most of the region

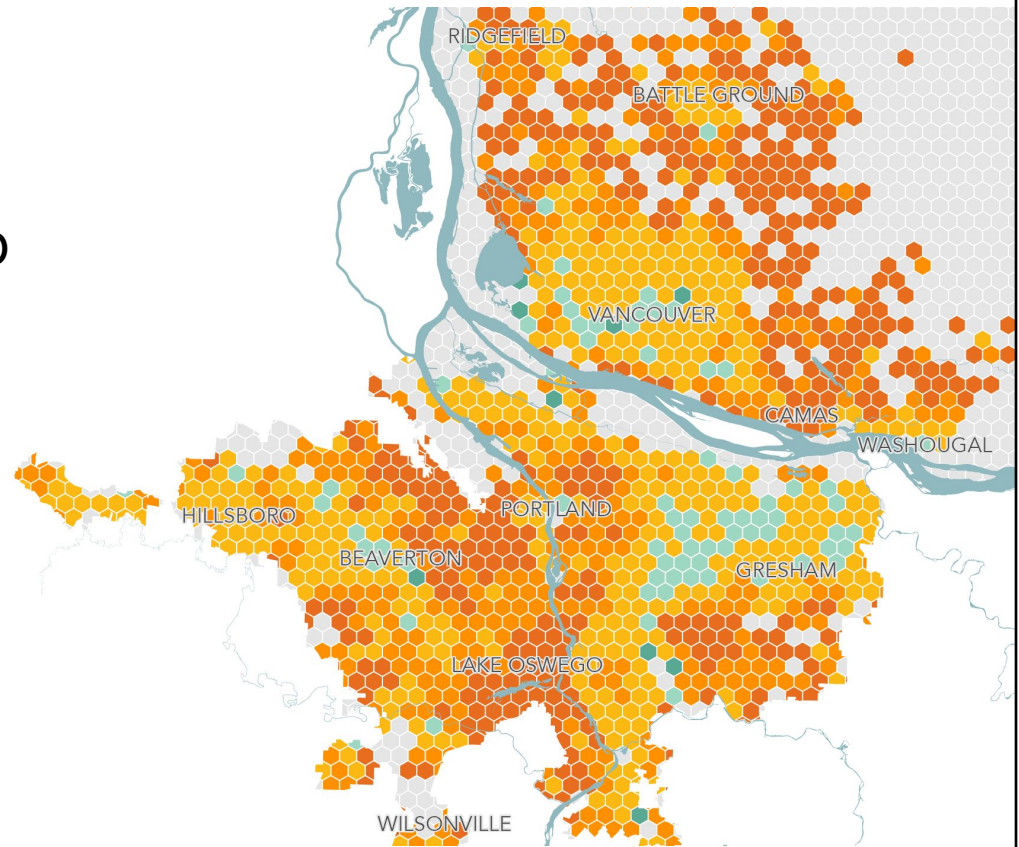
## Assuming:

20% down payment

6.5% mortgage rates

Median Family Income of \$116,900

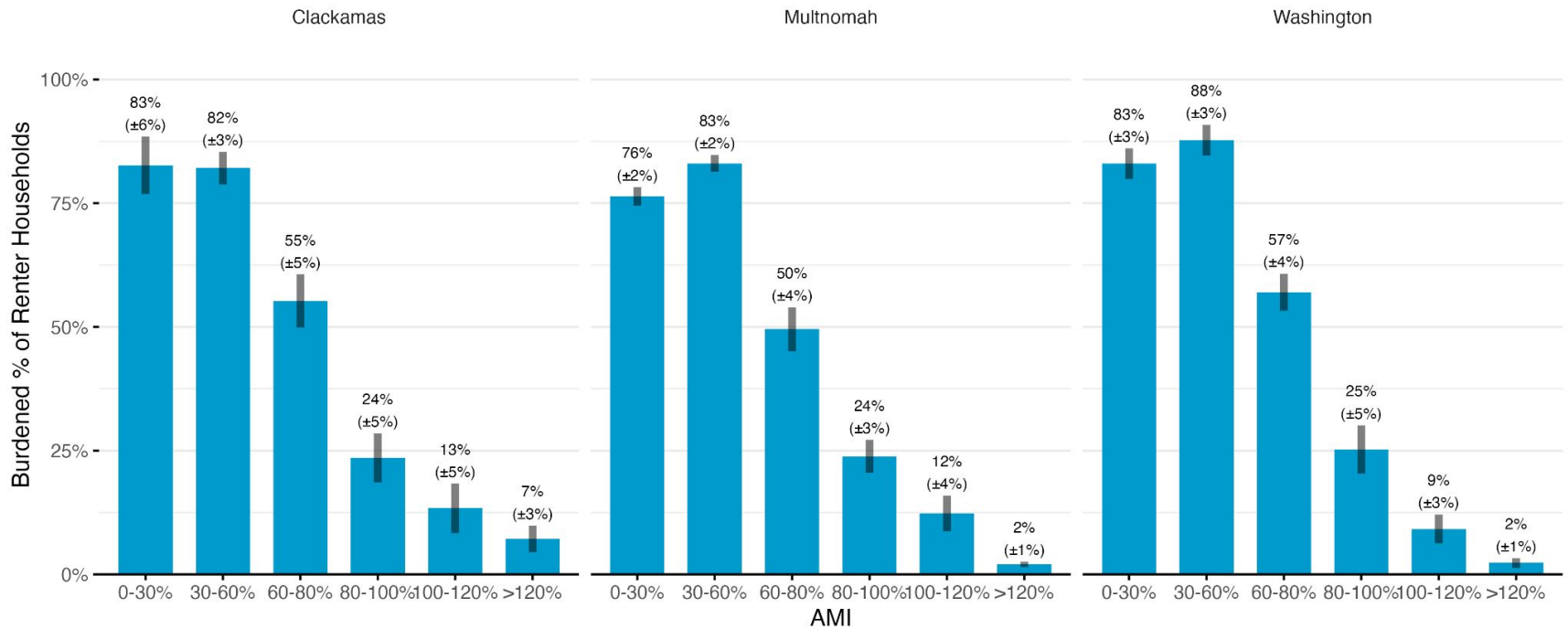
### Percent of Income Spent on Housing



Source: Metro RLIS, Clark County Assessor, Freddie Mac, ECONorthwest calculations

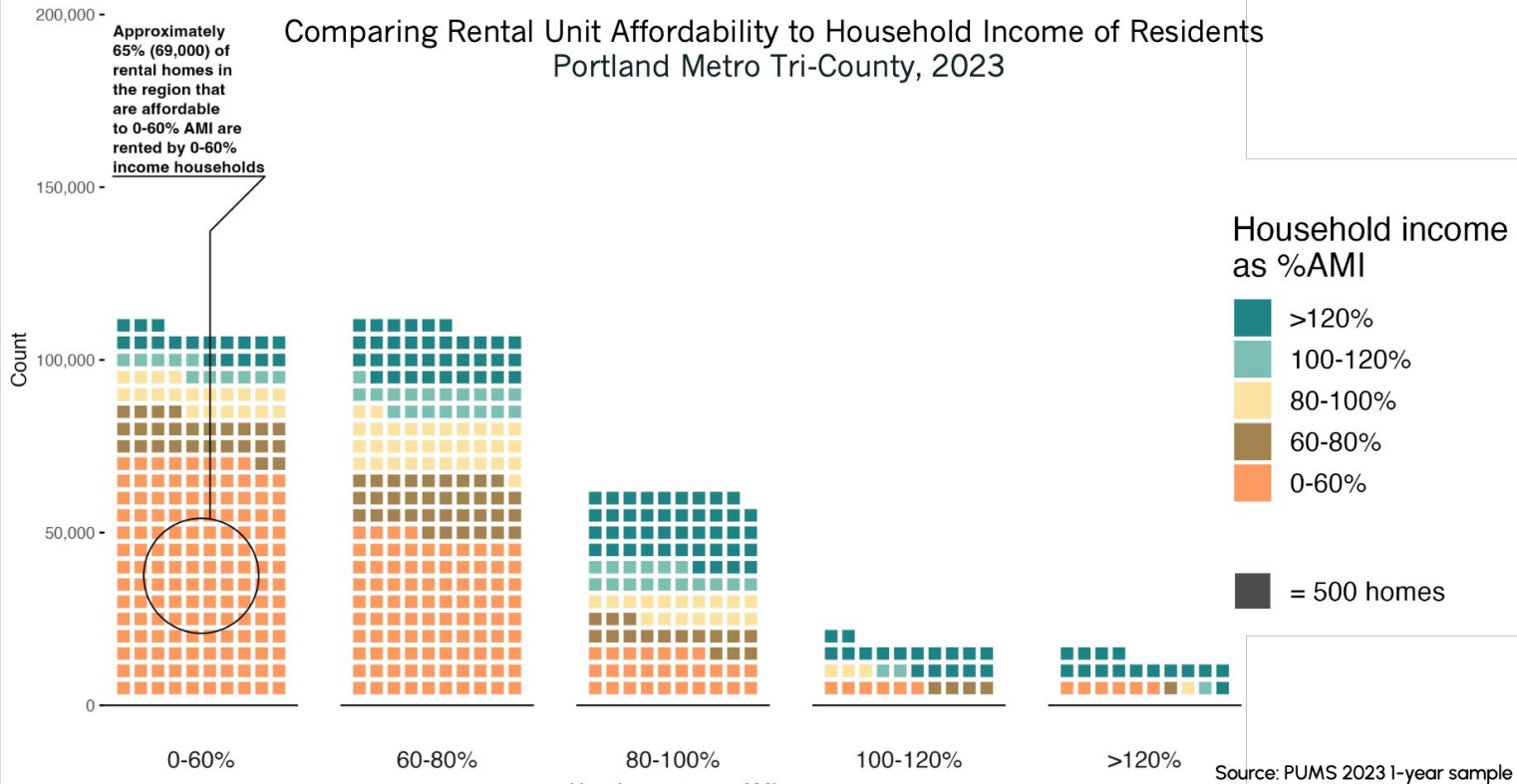
# 75%+ of low income renter households are cost burdened

## Renter Household Cost Burdening Rate



# Lack of housing units and households renting down contribute to burdening

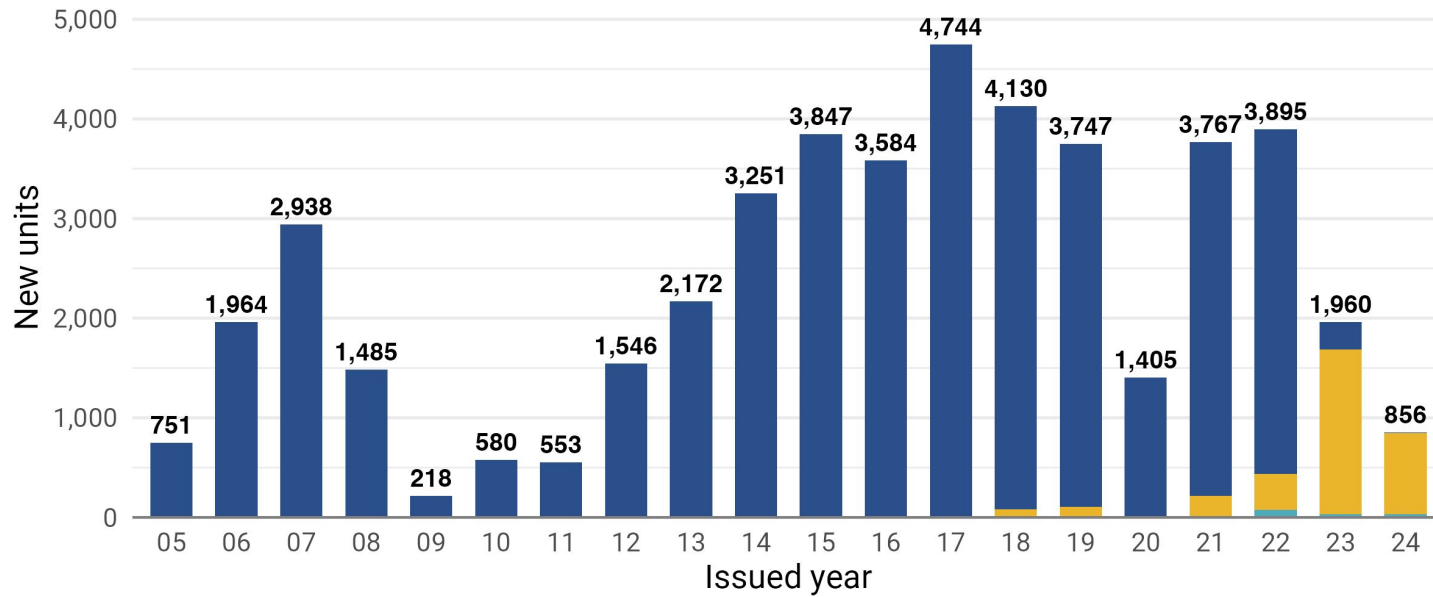
Comparing Rental Unit Affordability to Household Income of Residents  
Portland Metro Tri-County, 2023



# Multifamily permitting is non-existent in the City of Portland

## New Multifamily Permits Issued

City of Portland (through December 2024)



Source: City of Portland



Final



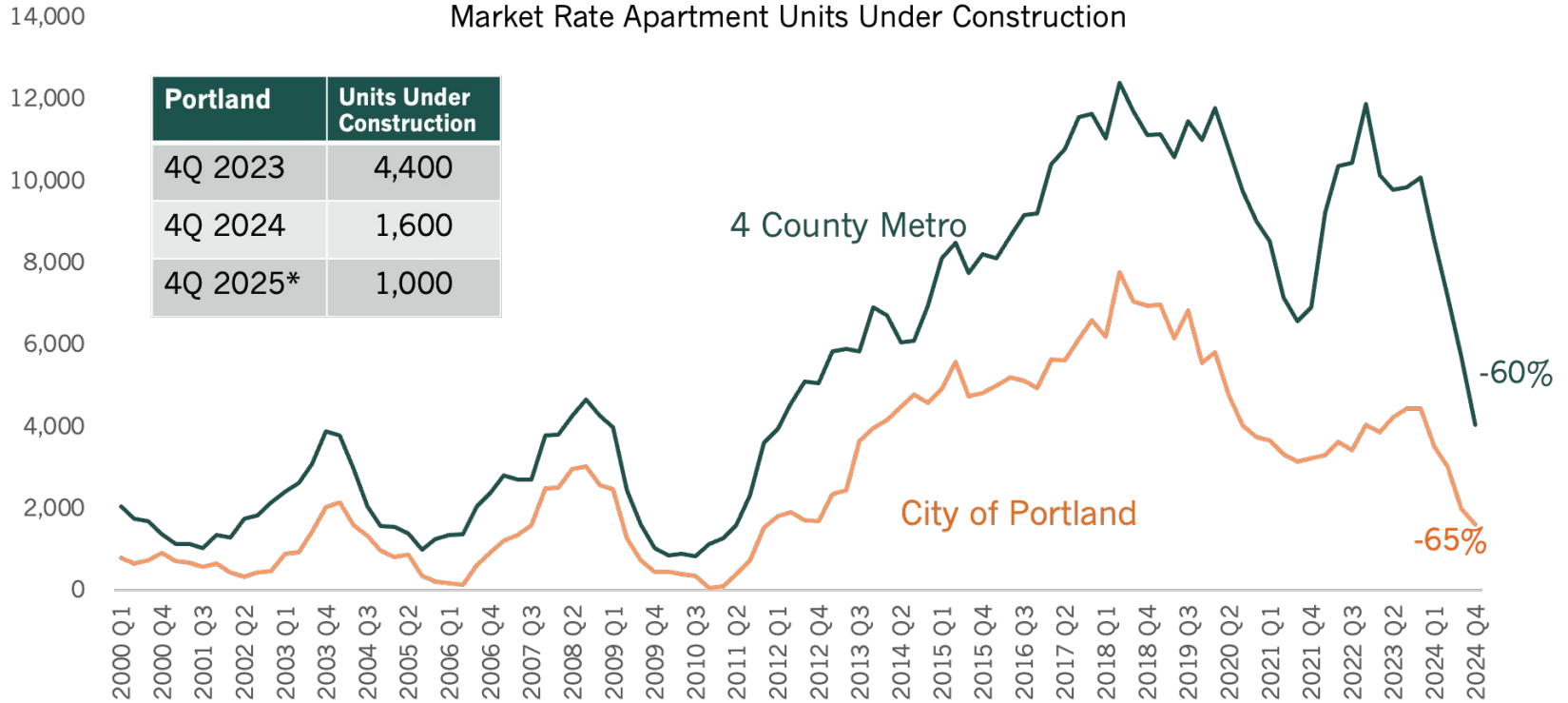
Under Inspection



Issued

# Fewest units under construction since 2011, leading to rent growth pressure

Market Rate Apartment Units Under Construction



Source: CoStar  
32



# Key takeaways

## Takeaways

By 2023, SHS had become the largest single source of funding for targeted homelessness interventions in the Portland metro region.

A soon to be released report will show that its share of regional funding increased in 2024.

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## Takeaways

Coincident with SHS's implementation, the region has seen a expansion of bed inventory—especially PSH, other permanent beds, and emergency shelter.

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## Takeaways

The program's goals are activity based, rather than outcome based, and they almost certainly will be met or exceeded.

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## Takeaways

The dynamic and unpredictable nature of homeless spells makes targeting interventions inherently challenging. The science of targeting is in its early development.

# The majority of unhoused people don't stay on the street. Many more are like Sarah.

**Ethan Ward** Capital & Main

Published 6:00 a.m. ET Dec. 27, 2022 | Updated 12:23 p.m. ET Jan. 11, 2023



Sarah splits time between her grandmother's garage, motels, her SUV, and a tent on Playa Del Ray.

*By how much does the homeless PIT count fall if she receives a permanent housing placement?*

*Better data can help to capture this reality.*

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## Takeaways

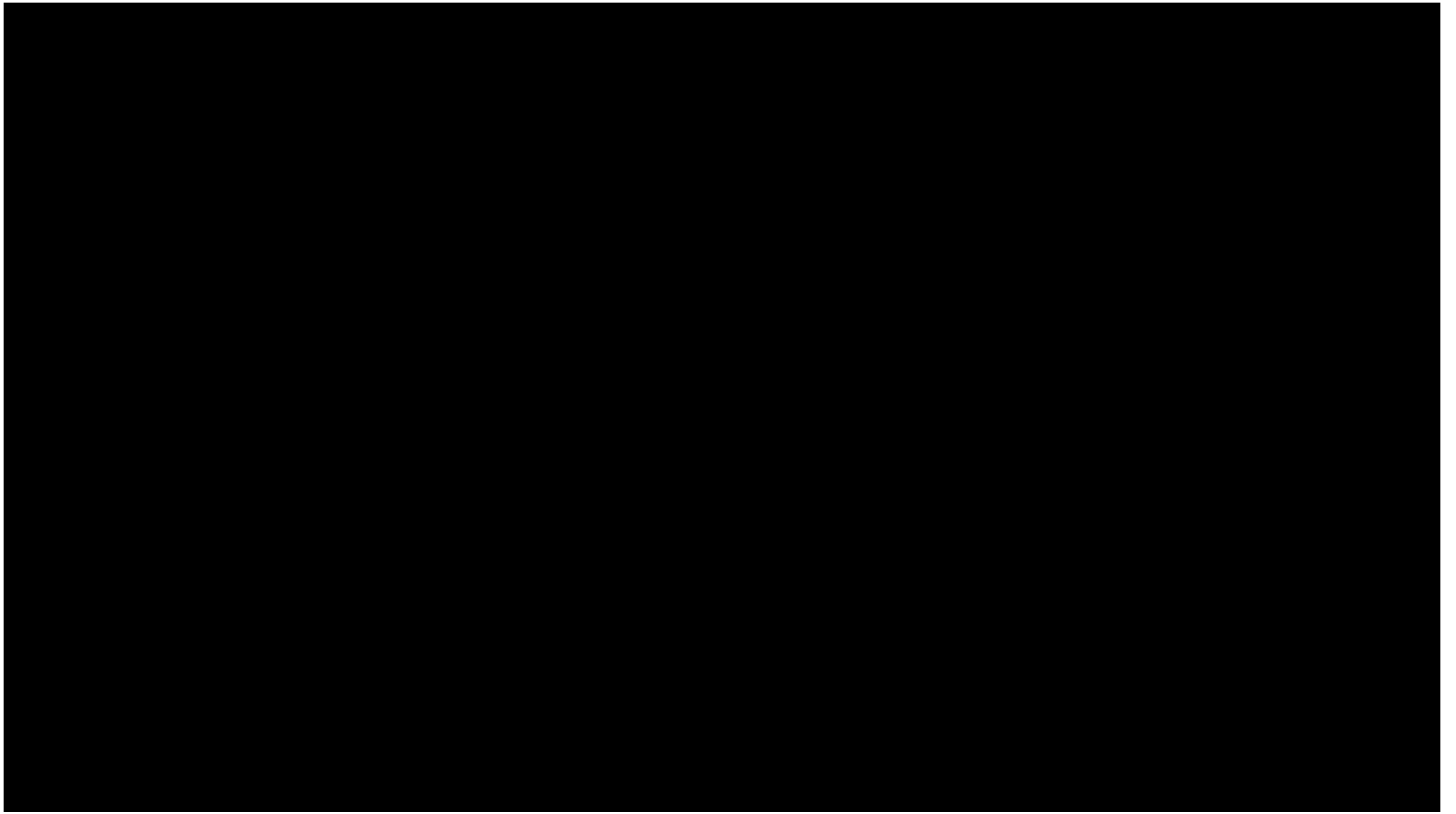
The principal drivers of the region's homelessness crisis, housing scarcity and high rents, have not eased since SHS's implementation and could worsen in coming years.

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## Takeaways

An abrupt end of SHS in the early 2030s would eliminate the major source of targeted homelessness funding and put upward pressure on total and unsheltered homelessness.





# Population Dashboard Launch

HRS Steering &  
Oversight Committee

April 16, 2025



# Presentation Overview

- HMIS and By Name List Background
- Why Population Data Matters
- Overview: New Population and Service Numbers
  - What we expect with better data collection
  - How this data will help reduce homelessness
- Further Improvements on the Horizon

# HMIS Background

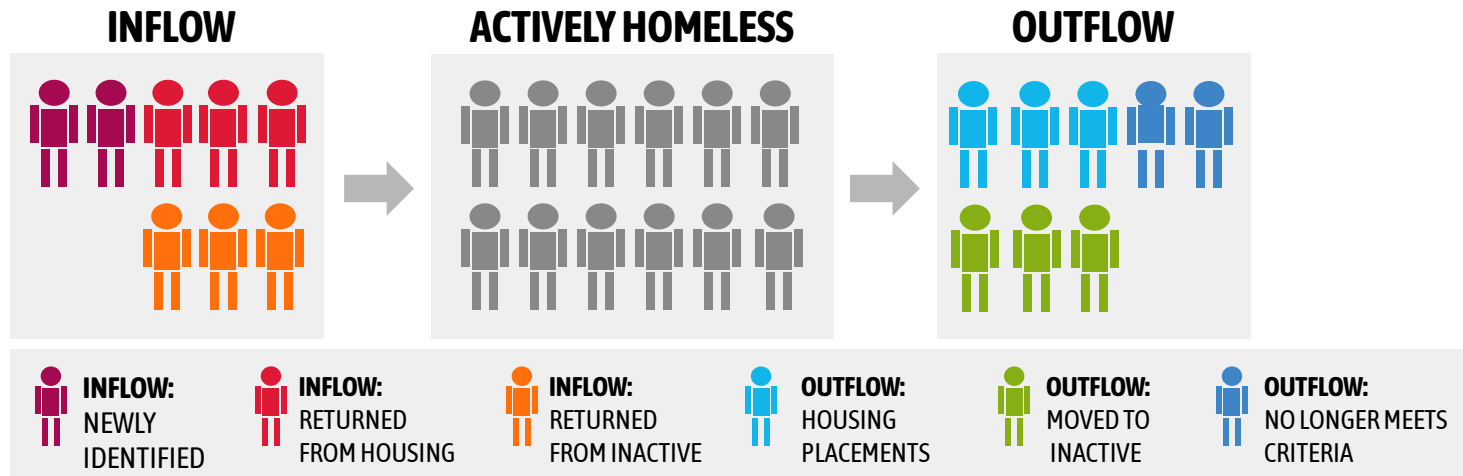
HMIS Data includes:

✓ Participant data      ✓ Services data      ✓ Housing data

- Data is collected during service interactions according to defined standards and contract requirements
  - HSD recently aligned and refined outcomes and output
- Counties perform data quality checks
- HMIS data is 'pulled' to create data reports and By-Name Lists

# HMIS Background: What's a BNL?

- HMIS Data is used to produce By Name List Reports including Snapshots of Who is Actively Homeless by Population: Population A, Unsheltered, and All Homeless



# New Population and Services Data

For the first time, we are showing:

- **Monthly snapshot of who we understand to be homeless**
  - Sheltered, Unsheltered, and location unknown
  - **Inflow and Outflow** to our By Name List
  - Demographics
  - Newly de-duplicated
- Improved (and some new) service data for Housing, Shelter, and Prevention
- Improved information on Chronic Homelessness

# Why this Dashboard Matters

- **Data-driven decisions lead to reductions in homelessness**
- Data helps **identify trends, track progress, and implement strategies**
- This tool transforms raw data points into actionable insights to help make informed decisions toward effective interventions.
- By leveraging insights, our community will be better at creating lasting change and improving people's lives.

# What Do We Expect

- Major milestone for our understanding of our community and the impact of our work
- With increased services and improved data collection, **we expect to see an increase in our By-Name List**
  - A sign of improved tracking, service reach, and data management
- Moving forward, changes in numbers are more easily understood to be real changes in lives

As efforts continue to expand outreach and provider participation, the By-Name data will become more comprehensive, *most likely resulting in higher actively homeless numbers.*

This increase doesn't mean that more people suddenly became homeless, but rather the system is better able to account for everyone who is experiencing homelessness across the community

- Community Solutions



# A Note on Comparisons to January 2024

New numbers for January 2024 only

Category	January 2024: Previous	January 2024: Updated*
Sheltered	3,197	4,401
Unsheltered	5,398	4,969
Unknown	2,558	2,420
Total	11,153	11,430

\*Differences due to de-duplication and data entry maturation (new rules leave 30 full days)

# New Population Numbers: Jan. '24 to Jan. '25

Category	By-Name List Metric	Jan. 2024	Jan. 2025
Population Count: People experiencing Homelessness	<b>Total population experiencing homelessness</b>	<b>11,430</b>	<b>14,361</b>
	Sheltered count	4,041	4,849
	Unsheltered count	4,969	6,275
	Sheltered status unknown	2,420	3,237
Monthly Inflow Data	<b>Total inflow into homelessness</b>	<b>1,362</b>	<b>1,277</b>
	Inflow: Newly identified	1,031	936
	Inflow: From "inactive" status	143	134
	Inflow: Return from housing	188	207
Monthly Outflow Data	<b>Total outflow</b>	<b>869</b>	<b>865</b>
	Outflow: To "inactive" status	532	504
	Outflow: To housing	337	361

# Key Takeaways

- People *are* moving off the list, but many remain
  - 5,502 people (48%) remain on the current list
  - 52% (5,928 people) are not on the February 2025 list
    - Matches our understanding of the numbers of people experiencing chronic homelessness
- Despite steady outflow to housing, **inflow is outpacing outflow**

## Key Takeaways (continued...)

- Despite year-over year progress in preventing more people from becoming homeless while housing and sheltering thousands – **people are entering homelessness faster than people are returning to housing.**
  - Housing shortage, lack of affordable housing; prices outpace wages.
  - Eviction cases statewide are the highest in over a decade.
  - Inflation has raised the price of rent, utilities, food, healthcare, and so many of our basic needs.
  - Other factors make people's circumstances or likelihood of becoming homeless worse, including the fentanyl crisis and the need for more readily available mental health assistance.

Dashboard 1:  
Population Data

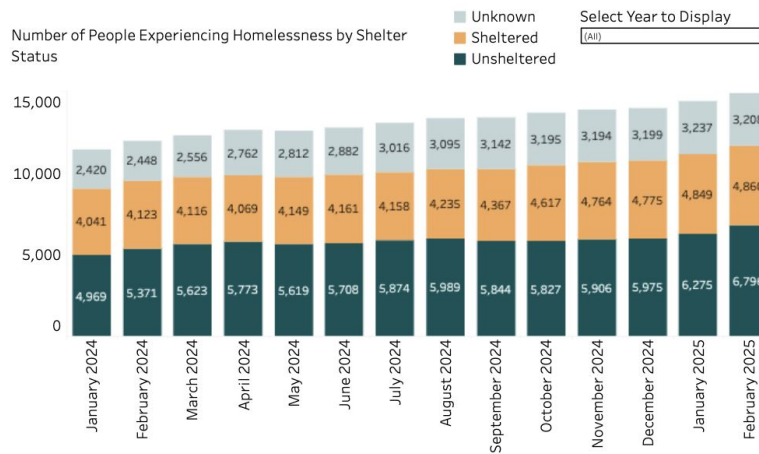
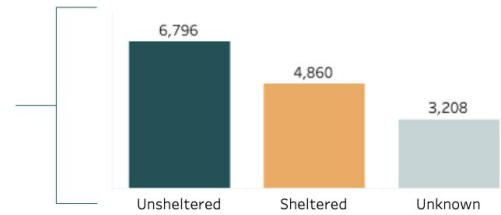
[johs.us/data-  
dashboard](https://johs.us/data-dashboard)

All sites include definitions, and a link to full glossary

Who is experiencing homelessness in Multnomah County?

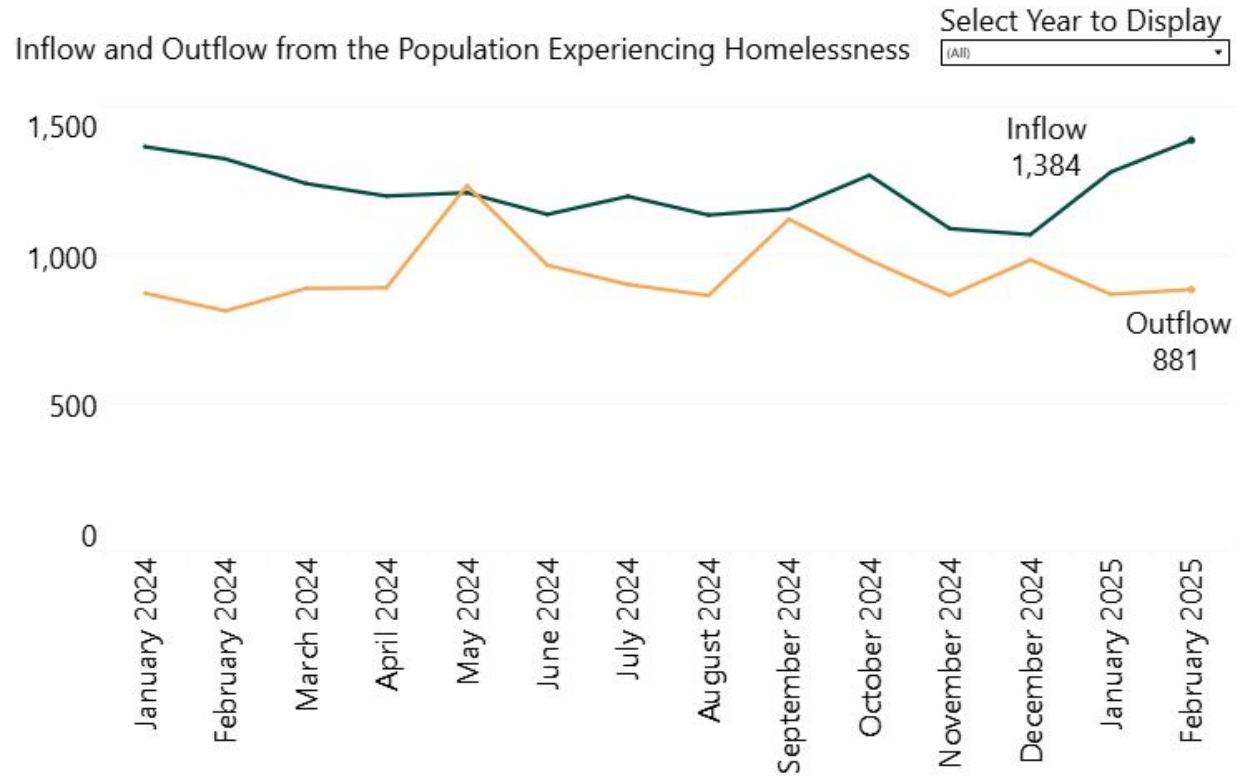


**14,864**  
People Experiencing Homelessness  
in February 2025



## Dashboard 1: Population Data

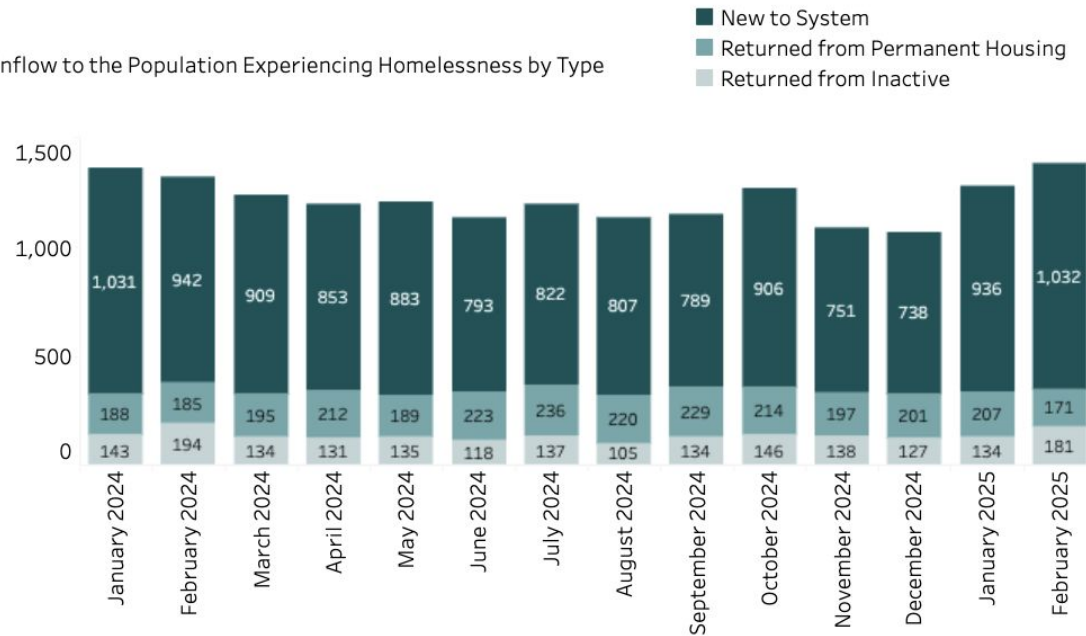
[johs.us/data-  
dashboard](https://johs.us/data-dashboard)



# Dashboard 1: Population Data

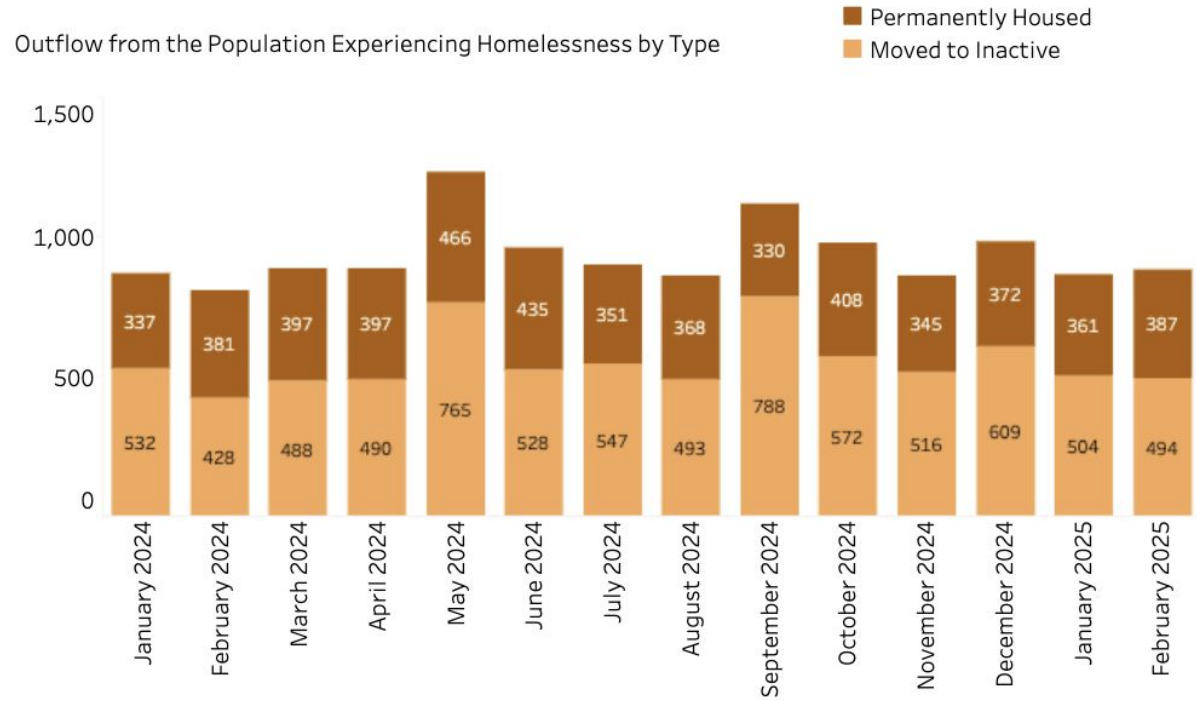
[johs.us/data-  
dashboard](https://johs.us/data-dashboard)

Inflow to the Population Experiencing Homelessness by Type



## Dashboard 1: Population Data

[johs.us/data-  
dashboard](https://johs.us/data-dashboard)





## Dashboard 1: Population Data

[johs.us/data-  
dashboard](https://johs.us/data-dashboard)

### What are the characteristics of the population experiencing homelessness?

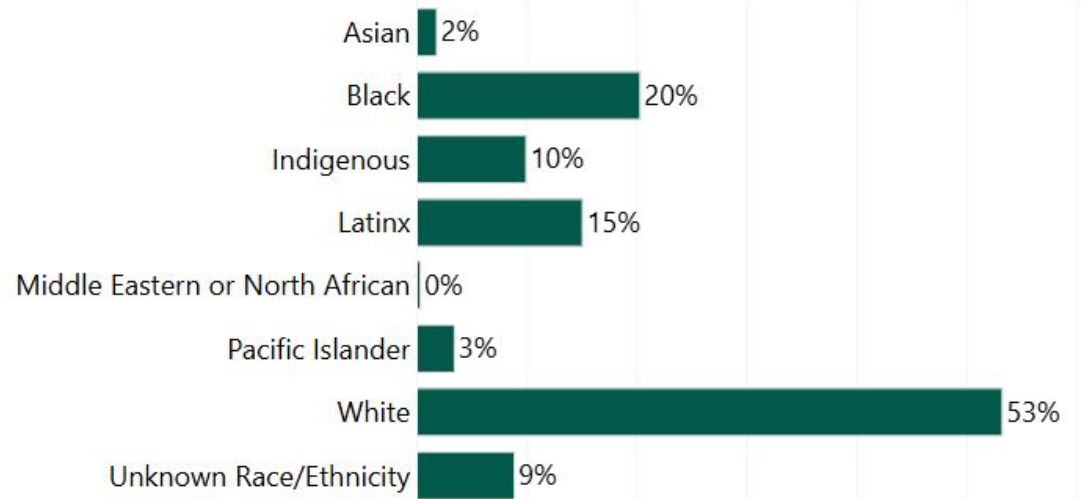
Select Demographic to View

Race/Ethnicity\*

Select Month to View

February 2025

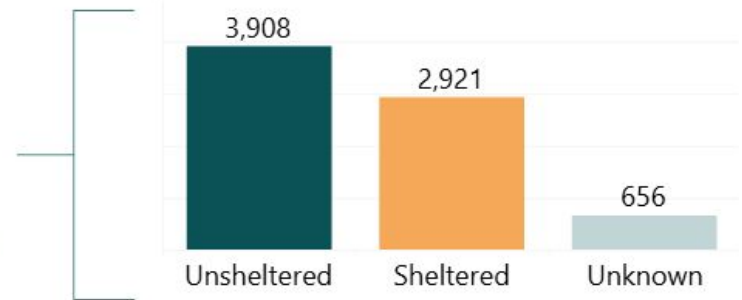
Population Experiencing Homelessness in February 2025 by Race/Ethnicity\*



Entire  
Population  
Dashboard  
can be filtered  
to review  
people  
experiencing  
chronic  
homelessness  
(Population A)

## Example

Who is chronically homeless in Multnomah County?



## Dashboard 2 Services Data:

### Shelter Occupancy

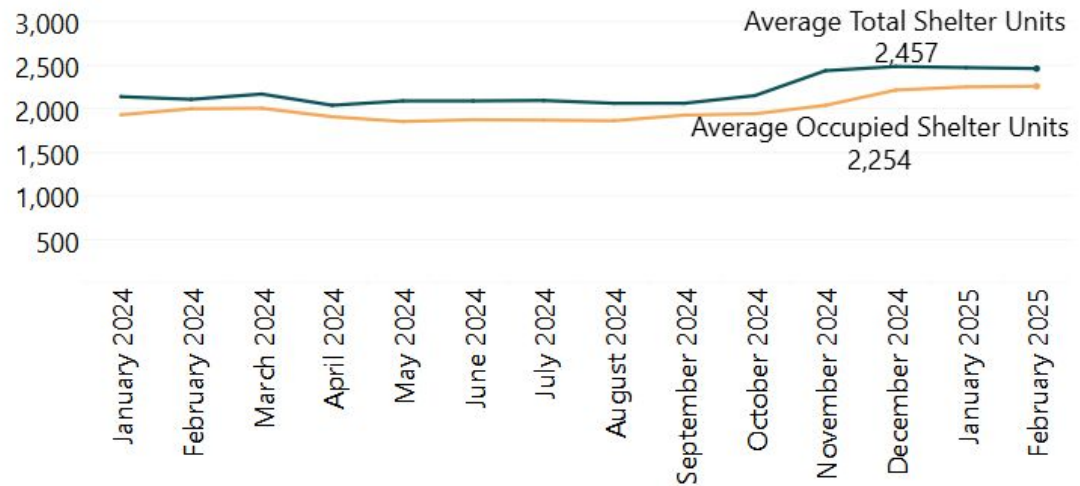
**91.7%**  
Shelter Occupancy Rate  
*in February 2025*



Shelter Capacity and Occupancy

Select Year to Display

(Multiple values) ▾

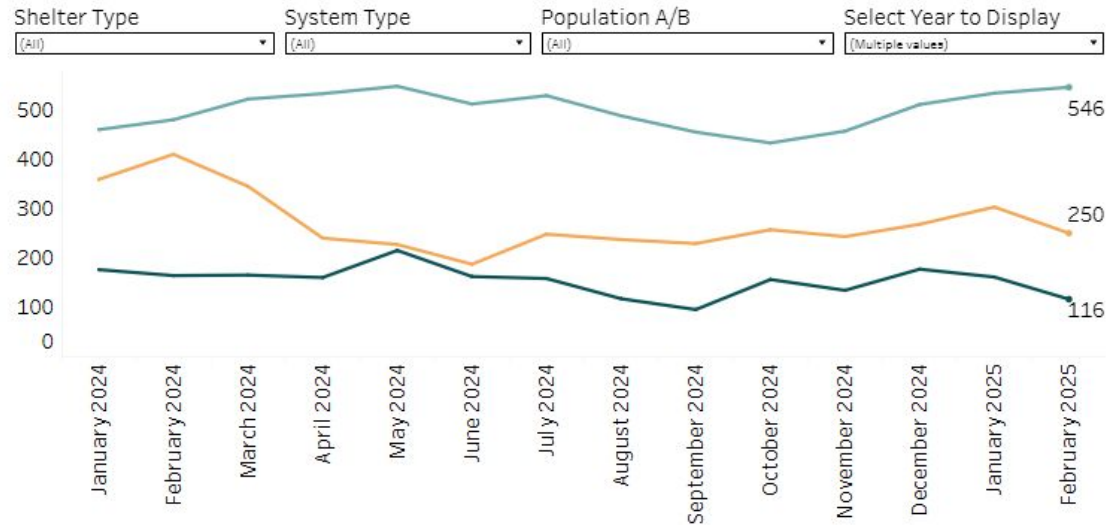


## Dashboard 2 Services Data:

### Shelter Exits

People Exited from Shelter by Exit Destination

- Permanent Housing
- Homelessness
- Temporary Housing, Institutional Setting or Other



Dashboard 2  
Services Data:

**People Placed  
and Sustained in  
Housing**

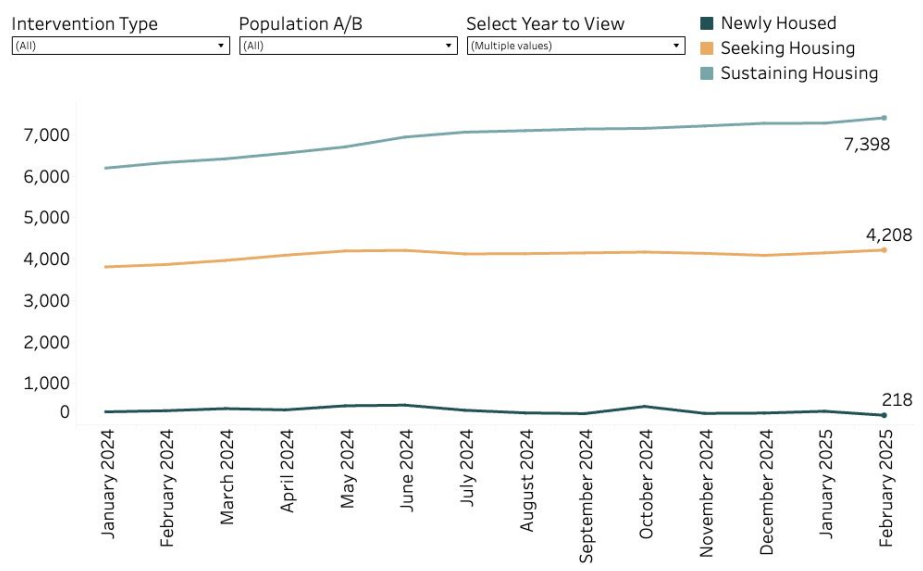
**(receiving  
subsidy)**

7,608 Persons Housed in Housing Programs in February 2025

**New!** 7,398 Persons Sustaining Housing in February 2025

218 Persons Newly Housed in February 2025

Number of People Enrolled in Housing Programs

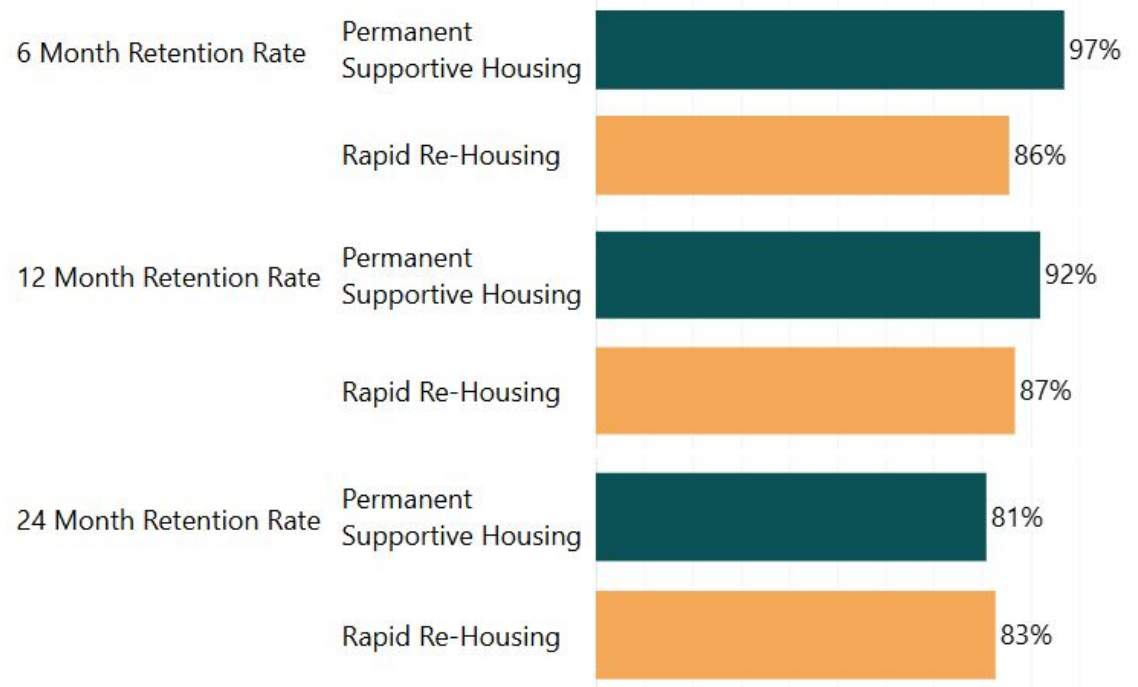


Dashboard 2  
Services Data:

**Housing  
Retention**

(post subsidy)

Housing Retention Rates at 6, 12 and 24 Months as of December 2024

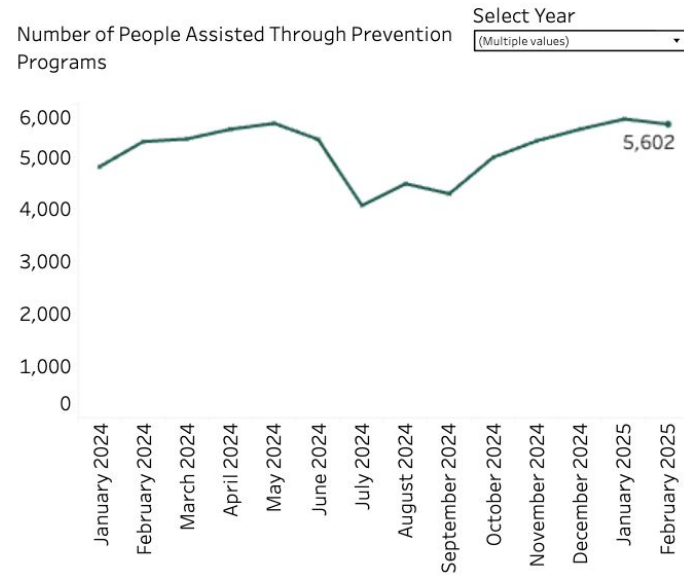


## Dashboard 2 Services Data:

### Prevention

Who accesses prevention programs in Multnomah County?

**5,602**  
Persons Enrolled in Prevention  
Programs  
*in February 2025*



# Demographic Data

- All services dashboards **also include demographics**
  - Served in shelter
  - Exiting from Shelter
  - Served in Housing
  - Housing Retention
  - Prevention Access
- This information is crucial as we seek to reduce disparities in who experiences homelessness (and who accesses and is successful in services)



# ***Reporting & Analytical Improvements***

- Contract Monitoring from Data Mart - October 2025
- SHS Enhanced Reporting Tools - August 2025
- Coordinated Access Monitoring - ongoing
- Program Offer Budget Tool
- Data Mart build out with IT - ongoing
- Shelter Occupancy improvements - October 2025
- Creation of an Equity Framework - October 2025
- HSD Data Governance structure - May 2025

# Data Admin Improvements

- Batch Duplicate Merge (phase 1) - *recently completed*
- Duplicate Merge - *ongoing*
- Update to Data Quality Monitoring - October 2025
- Digital training - July 2025
- Verbal ROI adoption - July 2025
- HMIS replacement project - ongoing

# ***In Depth Evaluations Underway***

- Rapid Rehousing Evaluation (collaboration with Focus Strategies)
- Pathways Evaluation (collaboration with HRAC)
- Best Practices [Shelter Report](#) (*recently completed*)
- System Equity Analysis
- [Research Repository](#) (*completion Spring 2025*)
- PSH Equity Evaluation (collaboration with NAEH/HRAC)
- Planned: Outreach Evaluation
- Planned: Inflow Analysis

# Summary

- New Population and Services dashboard
  - Major milestone and a great starting point
  - We can use this data to better understand policy questions and drive decisions
- Many other data and research improvements will support our continuous improvement
- FY 26 budgets and our community partnerships will further our work together



## Homeless Services Department

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### Visit Our Website

[johs.us](http://johs.us)

### General Inquiries

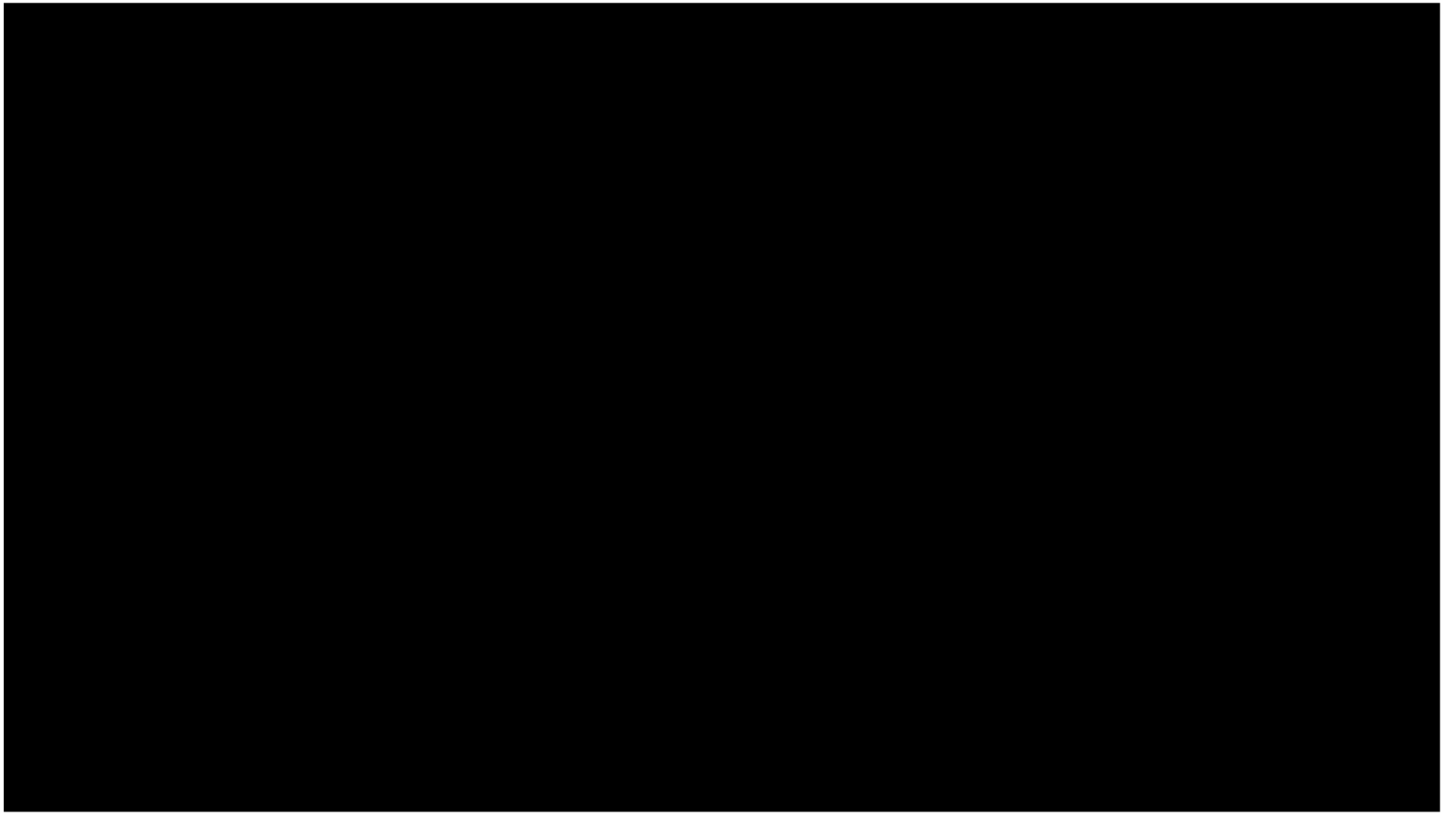
[johs@multco.us](mailto:johs@multco.us)

503-988-2525

### Media Inquiries

[pressoffice@multco.us](mailto:pressoffice@multco.us)

**Social Media |** @multco\_johs



# SOC Meeting Map

Agenda Highlights	Meeting Date	SOC Actions
<ul style="list-style-type: none"><li>• <i>CAC Member Appointments</i></li><li>• <i>HRS Quarterly Report overview and recommendations</i></li><li>• <i>Data Preview</i></li></ul>	<i>March 11</i>	<ul style="list-style-type: none"><li>• <i>Work Plan Presentation</i></li><li>• <i>Approve New CAC Members</i></li><li>• <i>Quarterly Report Presentation</i></li><li>• <i>Data Preview</i></li></ul>
<ul style="list-style-type: none"><li>• <b>City and County Budget Status</b></li><li>• <b>Presentation: Data Context</b></li><li>• <b>Presentation: Data Improvement Plan</b></li></ul>	<b>April 16</b>	<ul style="list-style-type: none"><li>• <b>Presentation &amp; Discussion</b></li></ul>

