

Developing and Implementing a Homeless Project Scoring Tool to Aid Project Ranking and Better Understand System Performance

Andy Halfhill



**What's Next:
In Data, Leadership, and Community**



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Session Overview

- Discuss the who, what, why, when, and how of a CoC's experience in developing and implementing a homeless project scoring tool and process
- Share lessons learned and tips to consider for your community
- HUD's tool – thoughts and comparison
- Q&A



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Session Objectives

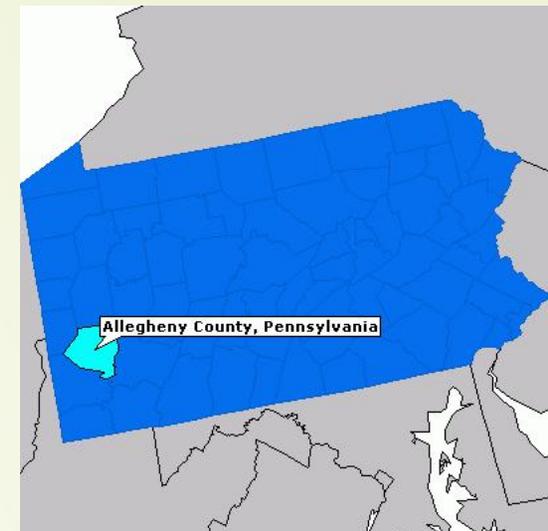
- Discuss some of the challenges and opportunities in working with stakeholders to develop a project scoring tool to more objectively and efficiently quantify project performance in a transparent way
- Learn how to implement a project scoring tool to inform funding decision making
- Understand how regularly measuring project level performance can help your community to better understand and work to improve system performance



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Allegheny County, PA CoC (PA-600)

- Includes the City of Pittsburgh and surrounding municipalities (population = 1.2 million)
- Redeveloped economy focused on education, healthcare, and technology
- County Dept. of Human Services operates as collaborative applicant and HMIS lead, with strong focus on program and data integration
- Operates a county-wide data warehouse



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Allegheny County, PA CoC (PA-600)

- 2017 PIT count = 1145 total persons (1092 sheltered + 53 unsheltered)
- 11,300 persons (unduplicated) served annually
 - 2200 in PSH
 - 1200 in transitional/bridge housing
 - 700 in RRH
 - 2800 in emergency shelter
 - 3000 in homeless prevention
 - 2700 non-housing supportive services
- 35 service providers with 125 homeless programs
- Funding overview: \$18 million in HUD CoC program, \$5.3 million from state (including family stabilization funding), \$2.3 million from ESG





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Scoring tool

- The project scoring tool is used to evaluate project performance within the CoC and set ranking priorities
- Uses objective, performance based scoring criteria to help determine how well the individual project is addressing the CoC (and HUD's) priorities of making homelessness rare, brief and non-recurring
- Tool uses HMIS and other data to help determine score for each metric based upon agreed to scoring rubric
- Helps CoC better understand how individual projects are contributing to system performance data
- Used to develop HUD-required CoC project priority listing and also by ESG funders to inform funding decisions



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Performance Metrics include:

- Unit utilization
- Housing performance (i.e. exits to or retention of permanent housing)*
- Increases in income/employment/non-cash benefits/health insurance*
- Length of time in program*
- Recidivism*
- Data quality
- Fiscal performance
- Cost effectiveness
- Adherence to housing first principles

*overlaps with HUD system performance measures



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Problem Identification

- The development and implementation of the scoring tool was a response to problems with our old process of evaluating and ranking projects, including:
 - Reliance on APRs with overlapping date ranges
 - Scoring was cumbersome for all, and especially difficult for evaluators not familiar with projects
 - Scoring was too subjective
 - Bottom line – was not efficient, reliable or sufficiently transparent



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Scoring tool development

- CoC Planning and Data committee, comprised of service providers, funders, collaborative applicant staff, other stakeholders charged with developing the tool. Tool and process approved by CoC board.
- Took several monthly meetings to find agreement on which metrics to include, the weight to apply to each metric (i.e. how many points out of 100 total points), scoring rubric, and recommendations about use of scoring results for making reallocation decisions
- Committee had to consider timing issues, including:
 - Completing scoring before NOFA application process began
 - Availability of necessary data for evaluation
 - Specific measures in tool and how the date range you use can be impacted (i.e. recidivism)
 - What to do with new projects and those active < 1 year



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Scoring tool completion process

1. HMIS lead agency staff developed a simple data dashboard to facilitate calculations
2. Quality control – HMIS data and calculation validation
3. Populating scorecards from dashboard data
4. Quality control – scorecard data validation
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6. Distribution of scoring tools to service providers; providers review and return scoring tool with requests for adjustment if applicable
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COC Scorecard 2017

Program Name

[REDACTED]

Provider

Program Name

Project Type

[REDACTED]

[REDACTED]

Rapid Re-Housing

Number of households without children 11

Number of households with children 7

Total exited	6
Total staying	6
TOTAL active	12

	Adult	Child	Grand Total
Total exited	3	4	7
Total staying	4	6	10
TOTAL active	7	10	17



January Utilization

April Utilization

July Utilization

October Utilization

9

6

7

10

COC Scorecard 2017

Program Name

Provider

Program Name

Project Type



Permanent Supportive Housing

Measure B: Housing
Performance

?

217

Measure C:
Maintain/Increase Non-Cash
Benefits

68

Measure C: Maintain/Gain
Employment

19

Measure C: Income
Increase

49

?

Measure C: Health
Insurance

?

214

Measure D: Length of
Time in Program

?

217

Measure E:
Recidivism

?

Data Quality : Missing Data

Program has no data
quality missing values

Program Name

No

.First Name

.Last Name

.SSN

.DOB

.Race

.Ethnicity

.Gender

0

0

0

0

1

0

0

.Veteran

.Disabling

.Relation to HOH

.Housing At Exit

.Move-In Date

.Housing Exit Assessment

0

3

0

0

0

0



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Quality control – HMIS data and calculation validation

- HMIS lead agency/collaborative applicant spent significant time validating that the dashboard used for calculations was working correctly, including:
 - Cross checking client level data within HMIS software
 - Use of SQL queries
 - Validation with other already developed dashboards and HMIS reports



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Allegheny County Continuum of Care Evaluation

2017 Renewal Application Project

Performance Outcomes

Agency:				
Project Name:				
Evaluation Data Review Period:	1/1/2016	to	12/31/2016	
Total HUD 2015 Grant Award:	\$ 404,074.00			
Type of Program:	PH/PSH			
Housing Programs: No. of Units	37		No. of Beds	106
Subpopulation Target A Served:	Families		Subpopulation Target B Served:	
Summary of Persons Served during Evaluation Period:				
	Households without Children		Households with Children	
Total Households Served :	Number of Households without Children	7	Number of Households with Children	28
Total Persons Served:	Adults	12	Adults	29
			Children	42
	Leavers		Stayers	
Total Persons:	Leavers	9	Stayers	74
Total Adults:	Exiting	5	Staying	36

a. Unit Utilization	Households in Units - Last Wednesday of given	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
January Utilization of Units	34	92%	5	0.75	12.75	14%	5 = 85% & above 4 = 75% - 84% 3 = 60% - 74% 2 = 50% - 59% 1 = 25% - 49% 0 = 24% & below
April Utilization of Units	29	78%	4	0.75			
July Utilization of Units	29	78%	4	0.75			
October Utilization of Units	29	78%	4	0.75			
b. Housing Performance	Specific Measure by Program Type	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Emergency Shelters: Consumers exiting to any TH or PH option		0%		3	15	17%	5 = 100% 4 = 85% & above 3 = 75% - 84% 2 = 60% - 74% 1 = 59% - 25% 0 = 24% & below
TH: Consumers exiting to any HUD-defined PH option		0%		3			
RRH: Consumers exiting to any HUD-defined PH option		0%		3			
PSH: Consumers remaining in PSH or exiting to any HUD-defined PH option	82	99%	5	3			
Prevention: Consumers remain in housing unit or move to a PH option during program participation		0%		3			

c. Income, Employment, Health Insurance & Non Cash Benefits (Leavers) - Non Permanent Supportive Housing	Specific Outcome Measure	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
1. <u>ADULT</u> consumers who increase income from all sources	2	25%	1	0.75	9.75	13%	Question 2 Employment 5 = 20% & above 4 = 11% - 19% 3 = 6% - 10% 2 = 3% - 5% 1 = 1% - 3% 0 = 0% employed
2. <u>ADULT</u> consumers become or remain employed during program	2	25%	5	0.75			
3. <u>ADULT & CHILD</u> consumers who have health insurance	19	86%	5	0.75			
4. <u>ADULT</u> consumers who maintain or increase non-cash benefits	4	50%	2	0.75			
d. Length of Time in Program: Applies to Specific Programs	Specific Measure by Program Type	% of Total Served	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Emergency Shelter: Consumers stay 30 days or less & exit to TH, RRH, PSH or PH as defined by HUD		0%		1	1	1%	5 = 85% & above 4 = 80% - 84% 3 = 70% - 79% 2 = 50% - 69% 1 = 25% - 49% 0 = 24% & below
Transitional Housing: Consumers staying or exiting program in 9 months or less		0%		1			
Permanent Housing: Consumers stay in PSH program or exit to PH		0%		1			
Rapid Rehousing: Consumers staying or exiting program in 9 months or less	34	29%	1	1			
Prevention: Consumers staying or exiting program in 9 months or less		0%		1			

e. Recidivism	Specific Outcome by Program	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Consumers exiting from a program to PH destination but return to homeless system (street outreach or ES or TH) in 6 months	0	0%	5.00	1	5	6%	5 = 0% - 24% 4 = 25% - 49% 3 = 50% - 59% 2 = 60% - 74% 1 = 75% - 84% 0 = 85% - 100%
f. Data Quality	Number of Missing Records	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Program had no data quality missing values			3.5	3	10.5	13%	5 = 10 /10 fields have less than 5% missing data 4.5 = 9/10 fields have less than 5% missing data 4 = 8 /10 fields have less than 5% missing data 3.5 = 7/10 fields have less than 5% missing data 3 = 6 /10 fields have less than 5% missing data 2.5 = 5/10 fields have less than 5% missing data 2 = 4 /10 fields have less than 5% missing data 1.5 = 3/10 fields have less than 5% missing data 1 = 2/10 fields have less than 5% missing data 0.5 = 1/10 fields have less than 5% missing data 0 = 0/10 fields have less than 5% missing data
Data Quality Category List							
First Name		0%					
Last Name		0%					
Social Security Number	3	17%					
Date of Birth		0%					
Race	2	11%					
Ethnicity	2	11%					
Gender		0%					
Veteran Status (at entry) <u>ADULT</u>		0%					
Disabling Condition		0%					
Relationship to Head of Household		0%					
Destination at Exit		0%					
Residential Move-In Date (RRH)	0	0%					
Housing Assessment at Exit (HP)		0%					

g. Fiscal	Amount / Number	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Grant expended all funding (Amount Returned in HUD 2015)	\$ -	0.00%	5	1			5 = 0-2% return of funds 4 = 3-4% return of funds 3 = 5-8% return of funds 2 = 9-10% return of funds 1 = 11-13% return of funds 0 = > 13% return of funds
Accuracy-Billing reports are submitted accurately and timely during 2016	6	50%	3	1	8	9%	5 = All billings submitted correctly w/ support documentation & on time 4 = 2-3 billings submitted late and/or required minor documentation changes 3 = 4-6 billings submitted late and/or required documentation changes 2 = 7-9 billings submitted late and/or required major documentation changes 1 = 10-11 billings submitted late and/or required major documentation changes 0 = All billings late and/or incorrect requiring major changes & adjustments
h. Cost Effectiveness of Program	Amount		Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Cost per unit	\$ 11,544.97		4	1			5 = Cost/Successful outcome fall within or below estimated level of funding or exit within comparison of like programs 4 = Cost/successful outcome fall within 5% of acceptable rate within comparison of like programs
Cost per successful outcome	\$ 11,884.53		4	1	8	9%	3 = Cost/successful outcome fall within 10% of acceptable rate within comparison of like programs 2 = Cost/successful outcome fall within 15% of acceptable rate within comparison of like programs 1 = Cost/successful outcome fall within 20% of acceptable rate within comparison of like programs 0 = Cost/successful outcome exceed 20 % or higher within comparison of like programs

i. Housing First Monitoring		Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Compliance with Housing First Principles		8	1	8.0	10%	Evaluation to meet Housing First: HUD 10-point Monitoring Tool utilized to determine score. Example: if answering "Yes" to all questions, then the score is 10. If answering 5 of 10 questions as "Yes" then 5 points awarded. If no questions answered as "Yes" then 0 points awarded.
TOTALS				Total Points for All Categories	Percentage of Total Points	
Total Score (non-PSH programs)				76.75	100%	



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Quality control – scorecard data validation

- Review scoresheets to validate that numbers generated from dashboard were properly applied to scoring tool
- Review scoresheets to validate that scoring rubric was applied correctly



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Development of calculations guide

- HMIS Lead agency/collaborative applicant developed a document explaining:
 - data used and source of data
 - universe of clients considered for each metric
 - how calculations were made to derive score
 - scoring rubric for each metric
- Guide not implemented until after ESG scoring process, which was a major lesson learned
- Number of questions and concerns about project scores were minimal as result of guide
- Further transparency to process

2017 Renewal Project Performance Outcome Worksheet Calculations Guide

The Renewal Project Performance Outcome Worksheet is a project scoring tool developed by the HAB'S CoC, Analysis and Planning Committee and adopted by the HAB for use in the 2017 HUD CoC competition on February 21, 2017. Its purpose is to provide an evaluative score for projects funded through the HUD CoC and ESG competitions. Please refer to the *2017 Ranking and Renewal Process for Evaluation Committee* for additional information about how these scores will be used by the HAB for these funding competitions.

The scoring tool measures performance based on 9 key areas:

- unit utilization
- housing performance
- changes in income/employment/non-cash benefits/health insurance
- length of time in program
- recidivism
- data quality
- fiscal performance
- cost effectiveness
- adherence to housing first principles

Data used to assign points in the scoring tool come from multiple sources – HMIS, grantee fiscal records and Housing First monitoring records. DHS developed a data dashboard tool (in the Tableau software) to make calculations for most of the performance measures that are based on HMIS data entered by providers in the Allegheny County HMIS. For projects that were active for all of 2016, the HMIS data used to calculate these measures was from March 7, 2017 (any data entered into HMIS after this day would not be reflected in the scoresheet). For projects that were active for less than all of 2016, the HMIS data used to calculate these measures was from April 3, 2017. The numbers generated by these calculations are applied to a scoring rubric for each measure which was developed as part of the tool. For example, a project will receive 5 points for unit utilization of 85% or higher, 4 points for unit utilization between 75-85%, etc. All sections of the scoring tool have a point spread of 0 to 5 except the Housing First Monitoring section, which has a point spread of 0-10. Further, each performance area mentioned above also has a weight applied to its scoring to reflect the HAB's priorities.

For projects that were active for less than 1 year (only part of 2016), projects were given scores of 5 for the sections where there was insufficient data to evaluate the measure. DHS recommends that the HAB consider changing this approach next year.

This guide explains how each section of the tool is populated and a score generated, including which

f. Data Quality

TOTAL POSSIBLE POINTS FOR SECTION = 15

f. Data Quality	Number of Missing Records	%	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Program had no data quality missing values			4.5	3	13.5	14%	5 = 10 /10 fields have less than 5% missing data 4.5 = 9 /10 fields have less than 5% missing data 4 = 8 /10 fields have less than 5% missing data 3.5 = 7 /10 fields have less than 5% missing data 3 = 6 /10 fields have less than 5% missing data 2.5 = 5 /10 fields have less than 5% missing data 2 = 4 /10 fields have less than 5% missing data 1.5 = 3 /10 fields have less than 5% missing data 1 = 2 /10 fields have less than 5% missing data 0.5 = 1 /10 fields have less than 5% missing data 0 = 0 /10 fields have less than 5% missing data
Data Quality Category List							
First Name		0%					
Last Name		0%					
Social Security Number	3	5%					
Date of Birth		0%					
Race		0%					
Ethnicity		0%					
Gender		0%					
Veteran Status (at entry) ADULT		0%					
Disabling Condition	10	16%					
Relationship to Head of Household		0%					
Destination at Exit		0%					
Residential Move-In Date (RRH)		0%					
Housing Assessment at Exit (HP)		0%					

For each data element, the value is the sum of all client records where there is a null (missing) value on the client’s HMIS record (entry or exit assessment) for the project being evaluated. Refer to the following chart to understand which assessment and the client universe considered:

HMIS Data Element	Assessment Used for Measure	Client universe included
First Name	Entry	leavers + stayers
Last Name	Entry	leavers + stayers
Social Security Number	Entry	leavers + stayers
Date of Birth	Entry	leavers + stayers
Race	Entry	leavers + stayers
Ethnicity	Entry	leavers + stayers
Gender	Entry	leavers + stayers
Veteran Status (at entry) ADULT	Entry	Leavers + stayers (adults)
Disabling Condition	Entry	leavers + stayers
Relationship to Head of Household	Entry	leavers + stayers
Destination at Exit	Exit	leavers
Residential Move-In Date (RRH)	Exit	leavers
Housing Assessment at Exit (HP)	Exit	leavers

The “Residential Move in Date” data element applies only to rapid re-housing projects. The “Housing Assessment at Exit” data element applies only to homeless prevention projects, and is an actual data field in HMIS (see below). This is not to be confused with the completion of a client’s actual Exit Assessment and all the questions that are contained within the exit

h. Cost Effectiveness of Program:

TOTAL POSSIBLE POINTS FOR SECTION = 10

This measure assesses the project's cost per unit and cost per successful outcome as compared to other projects in the same project types category (i.e. PSH, RRH, etc.).

- HUD CoC projects - scoring tools are completed by DHS staff
- ESG projects - scoring tools are completed by Allegheny County and City of Pittsburgh ESG administrators

h. Cost Effectiveness of Program	Amount	Individual Points	Weighted Points	Total Points for Category	Percentage of Total Points	Point Spread
Cost per unit	\$ 13,349.33	0	1	0	0%	5 = Cost/Successful outcome fall within or below estimated level of funding or exit within comparison of like programs 4 = Cost/successful outcome fall within 5% of acceptable rate within comparison of like programs 3 = Cost/successful outcome fall within 10% of acceptable rate within comparison of like programs 2 = Cost/successful outcome fall within 15% of acceptable rate within comparison of like programs 1 = Cost/successful outcome fall within 20% of acceptable rate within comparison of like programs 0 = Cost/successful outcome exceed 20% or higher within comparison of like...
Cost per successful outcome	\$ 14,562.91	0	1			

Cost per unit (HUD CoC projects) = total amount billed during evaluation period/total # of households served during evaluation period

(For ESG programs that were scored as renewal projects for PY17 funds, cost per unit was calculated differently than how it is being calculated for HUD CoC projects. For ESG projects, cost per unit was calculated as the total amount billed in the evaluation period/total number of beds listed for the project in MPER.)

Cost per successful outcome for PSH projects = total amount billed during evaluation period / (# household stayers + # household leavers to permanent housing destinations during evaluation period)

Cost per successful outcome for rapid rehousing projects = total amount billed in evaluation period / (# household leavers to permanent housing destinations during evaluation period)

The project receives 0 to 5 points for performance on each of these two measures about



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Project Response to Performance Outcomes		
Name of Person Reviewing		
Date of Review:		
Did the program meet all the Performance Measures listed in Sections a to i?	Yes	No
If no, please address the following questions in a brief and concise answer:		
1. Comments on Performance		
Performance	Did the project receive 4 or 5 points? Yes or No. If yes, do not need to explain.	Please explain if you would like to tell the evaluators the issues encountered for the low score.
a. Unit Utilization		
b. Housing Performance		
c1. Income		
c2. Employment		
c3. Health Insurance		
c4. Non-Cash Benefits		
d. Length of Time in Program		
e. Recidivism		
f. Data Quality		
g. Fiscal		
h. Cost Effectiveness		
i. Housing First		
2. Further information about this program that may assist the evaluator to understand the challenges or the high performance of your program.		



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Evaluation committee review and adjustment process

- Evaluation committee reviewed scores and comments from service providers
- Committee members submitted revised scores, including written justification for change, for each project if changes were made
- Final scores were used to determine ranking list order, with special consideration for projects that were not yet operational in 2016



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What worked well...

- “Data culture” made development and implementation easier
- Collaborative process facilitated CoC-wide buy in
- HMIS lead agency staff resources and capacity
- Sufficient time to develop, test, implement - started process immediately after submitting FY16 CoC application
- Development of calculations guide (trust and transparency)
- Use of custom data dashboard made completing scorecards fast
- Project ranking faster and easier for CoC
- Made reallocation decisions data driven and transparent



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What DID NOT work well...

- Implementation with ESG programs before finishing and distributing calculations guide
- Too many cooks in the kitchen completing scoring sheets; better coordination with ESG funders
- Need for better communication with providers not involved in development of tool
- HMIS software issues related to data quality scoring



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Possible changes for next cycle:

- Including client satisfaction data
- Changing cost effectiveness metrics
- Analyzing score distribution for each metric to see if rubric adjustments needed
- Reducing weight of data quality score (15%) as CoC has improved in this area and/or factor in data entry timeliness
- Income metric to include both “maintain” and increase, as applicable
- Not awarding full points for metrics with insufficient data (active < 1 year)
- Including score from collaborative applicant monitoring
- Further refinement with how scoring impacts reallocation decision making



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HUD's Rating and Ranking tool

- Our community completed development of tool in April 2017
- Serves the same purpose of helping to generate a score for each project to assist in ranking projects
- HUD clear in guidance that CoC's aren't required to use their tool, nor are there bonus points in NOFA application for using it
- Similarly, is an Excel-based tool
- HUD tool uses bed data (as in HIC); our tool uses unit data
- HUD tool similarly requires local input into scoring criteria and scoring weights, etc.



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HUD's Rating and Ranking tool

- Similarly only applies to residential housing projects (PSH, RRH, TH, etc.)
- Both use HUD system performance measures as basis for scoring criteria
- Both highly customizable and use scoring rubrics
- HUD tool relies on data from APRs, CAPER and local sources; our tool uses data directly from HMIS (can be used for whatever time period desired)
- HUD tool utilizes a coordinated assessment score; our tool does not



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Questions?



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