Boston CoC Provider Meeting

Tuesday May 7, 2024
10:00 - 11:30 am via Zoom

AGENDA

10:00 - 10:10	Welcome, Introductions, Housekeeping
10:10 - 10:20	CoC 23 debrief and update
	● Overview of Awards
	● New Projects- update
	● Contracting process–update
10:30- 10:50	LMS and Training Updates
	● Required Courses
	● Equal Access assessment
	● CoC program refresher
10:50 - 11:15	CoC 24 preview
	● Expected timeline
	● Renewals & project scoring
	● Reallocation
	● New project applications
	● Program Monitoring- process & timeline
	● '24- '25 Changes
11:15 - 11:30	Questions & Adjourn

Meeting Guidelines

- Tech Check - mute, mic, phone, etc.
- Be present, ask questions (please limit multi-tasking while we're together)
- Assume good intentions
- Don't interrupt other people when they're speaking (or attempt to speak over them)
- Stay muted unless you are speaking
- Use raise-hand feature, Q&A feature, and chat feature
- When in doubt, practice common courtesy

Today's Presenters

Katie Cahill-Holloway

Adelina Correia

Jen Flynn

Bia Moreira

Meet the Supportive Housing Division (SHD)- Mayor's Office of Housing (MOH)

Jim Greene

Gail Schmidt

Kiarah Perdomenico

Amanda Kwok

Bia Moreira

Jason Ercolano

Allison Singer

Kathleen Freeman

Maria Santos

Zarifa Jamal

Nathan Satish

Yahaira Bautista

Justin Peczkowski

Laura Rivera-Davis

Caroline McCabe

Matthew Landers

Rhonda Taylor

Jennifer Jones

CoC 23 Debrief and Updates

CoC NOFO Refresher

- **Continuum of Care (CoC) Competition:** A federal grant competition administered by the Department of Housing and Urban Development (HUD). It encourages collaboration among service providers, nonprofits, and government agencies to create a comprehensive approach to ending homelessness within a specific region.

- **Notice of Funding Opportunity (NOFO):** Formal announcement that funds are available, with information about how to apply

- **CoC Lead:** The Continuum of Care (CoC) Lead is the designated entity or organization responsible for coordinating and managing efforts to address homelessness within a specific geographic area

MOH

Boston's CoC 23 NOFO Application

- MOH submitted the application on 9/27/23
- By the numbers:
  - The application totaled **$44,296,159**
    - New projects = $3,792,509
    - Renewals = $36,240,482
    - YHDP renewals = $2,763,168
    - CoC Planning = $1,500,000
  - Total of 43 individual project applications

CoC NOFO Awards

- HUD published the awards for CoC 23 on 1/29/2024

- Boston was fully funded!

- Total **award of $47,706,835**
  - Includes:
    - CoC Planning grant
    - FMR increases for rental assistance and leasing programs
    - 4 new permanent housing projects

CoC 23 NOFO Bonus project- overview

Application update / overview

4 for 4!
- 2 CoC Bonus (1 PSH & 1 Joint TH-RRH)
  - Hildebrand- 12 units of PSH for families
  - Victory- Joint TH-RRH for LGBQT+ youth
- 2 DV Bonus- Category 4 (2 Joint TH-RRH proposals)
  - Justice 4 Housing- Joint TH-RRH for Category 4 (survivor households)
  - Victory- Joint TH-RRH for Category 4 - trafficking survivors

- Sponsored by 1 current CoC provider and 2 new providers!...Welcome!

CoC 23 - Next Steps

- MOH to work with HUD on grant agreements
  - Address any outstanding project application issues
- MOH to develop contract packages for renewals
- MOH delivering new project on-boarding training series
  - CoC program overview
    - Participant eligibility
    - Allowable costs
    - HMIS / comparable database / CE requirements
    - Contracting with MOH
    - Joint TH-RRH learning community

Learning Management and Training
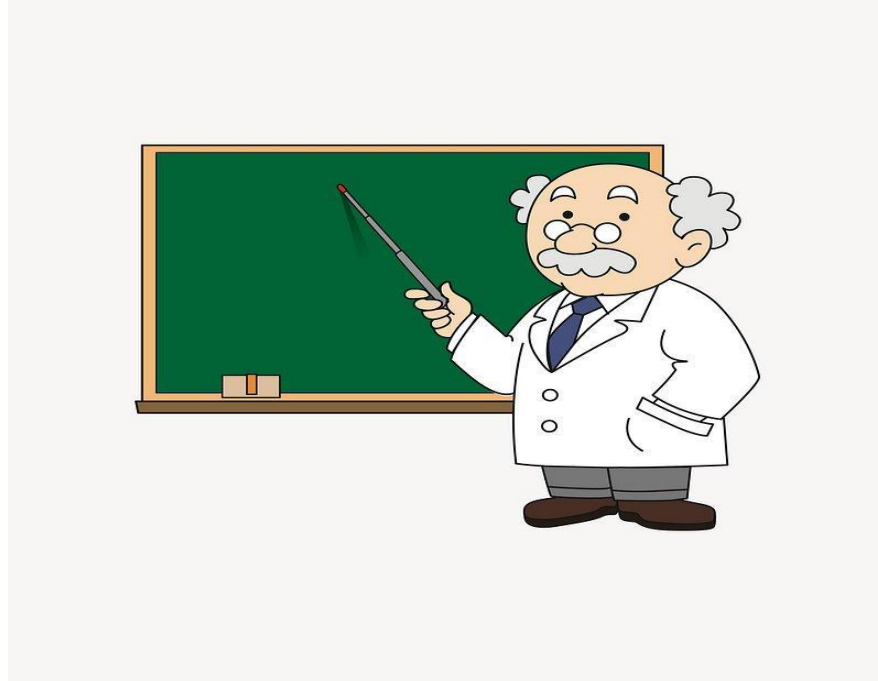
LMS & Training Updates & Background

- MOH, as the Collaborative Applicant, is required to deliver training opportunities to CoC & ESG funded providers to ensure the community has the most up-to-date information on program requirements and best practices

- Training is made available in a variety of formats:
  - Live meetings / webinars
  - One on one with MOH staff
  - Direct technical assistance
  - On demand through the CoC's Learning Management System (LMS)

Learning Management System

- MOH recently tested a broad training effort via the LMS
- CoC funded program reps were asked to complete 6 required courses
    - 1. Continuum of Care Basics (CoC 101)
    - 2. Data and the Community (DQ101)
    - 3. Definitions: Homelessness, Chronic Homelessness, Disabling Condition
    - 4. Understanding Housing Move-In Date
    - 5. Understanding Project Start Dates
    - 6. Warehouse Privacy, Security, End User Agreement, and Tour
- Optional
    - Affirming Support for LGBTQ+ Persons in Housing
    - Trauma-Informed Approaches (7-course module)

- Full or partial completion rate of 92%
- Survey feedback summary was positive! Thank you for your insights!
- Completion of this CoC required training will be an unscored element on this year's project scorecard
- Anticipate associating points for this in future competitions

Learning Management System

- You must set up a user account to enroll in the LMS

- To request an account you can submit a ticket to the HMIS help desk
  - [Boston CoC Help Desk case](#)

- Once you have an account, you can request enrollment or self enroll in certain modules

Equal Access Assessment

- On September 21, 2016, HUD published a final rule in the Federal Register entitled "Equal Access in Accordance with an Individual's Gender Identity in Community Planning and Development Programs." Through this final rule, HUD ensures equal access to individuals in accordance with their gender identity in programs and shelter funded under programs administered by HUD's Office of Community Planning and Development (CPD). This rule builds upon HUD's February 2012 final rule entitled "Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity" (2012 Equal Access Rule), which aimed to ensure that HUD's housing programs would be open to all eligible individuals and families regardless of sexual orientation, gender identity, or marital status.
- The Equal Access Rule (EAR), a series of three separate regulations, requires equal access to HUD housing programs without regard to a person's actual or perceived sexual orientation, gender identity, or marital status.
- The final rule requires that recipients and subrecipients of CPD funding, as well as owners, operators, and managers of shelters, and other buildings and facilities and providers of services funded in whole or in part by any CPD program to grant equal access to such facilities, and other buildings and facilities, benefits, accommodations and services to individuals in accordance with the individual's gender identity, and in a manner that affords equal access to the individual's family.

Equal Access Assessment

- HUD recently published an Equal Access Assessment tool to assist providers with reviewing their programs for compliance with the Equal Access Rule
- The tool is self-assessment style and MOH is requiring that all CoC funded programs complete the self-assessment as part of their self-monitoring review
- Upon completion of the assessment, providers will be asked to complete a google form certification
- This information will be used by MOH to complete certain questions in this year's CoC application

CoC program refresher

Match requirements:

What are the CoC Match requirements? (§ 578.73(a))

- The CoC Program requires a 25 percent match of the awarded grant amount minus funds for leasing. Cash or in-kind resources will satisfy the match requirement.
- CoC match information is collected at time of your annual CoC application
- CoC match commitments must be documented and verified prior to grant agreement

Match- cash versus in-kind

- Must contribute 25% of all CoC budget lines (except leasing)
- Must be used for CoC-eligible expenses
  - **Cash Example**- **The Happy Days agency meets its cash match obligation by contributing unrestricted funds towards the salary for its CoC case manager.**
    - This is eligible as cash match because case management is a CoC -eligible cost.
    - Cash match is documented by a cash match letter and by including the cash as a source on your general ledger for the program.
    - The match must be verifiable on your GL as a dedicated program budget source
    - Program must report value of match contribution on its monthly invoice

Match- cash versus in-kind

- Match requirement can be met through the commitment of in-kind resources that are dedicated to your CoC program
- **What is in-kind match? (§ 578.73(c))**
- In-kind match is the value of any real property, equipment, goods, or services contributed to a CoC Program grant that would have been an eligible CoC Program activity if the recipient or subrecipient paid for them directly with CoC Program funds. In-kind match can be donations provided directly by the recipient, subrecipient, or third party.
- In-kind match must be documented through a MOU or MOA between your agency and the partner that is providing the in-kind services
- These agreements have specific requirements and must be approved by HUD in advance of the grant agreement
- Like cash, in-kind match must be for services that are CoC eligible

Match- cash versus in-kind

In-kind match example:

The Happy Days agency has partnered with The Happy Kids agency to make child care vouchers available to CoC program participants.

The value of the vouchers is eligible as CoC in-kind match because child care is an eligible [CoC supportive service](#).

This arrangement must be documented through a MOA that provides detail on the # of vouchers that will be available to Happy Days CoC clients, the value of the vouchers and the dates that the vouchers will be available.

CoC administrative costs

- CoC funded programs are allowed to charge administrative costs for expenses directly related to implementation and management of the CoC funded program.
- MOH and CoC funded programs have split the administrative line item, historically capped at 7% (3.5% for each)
- Providers are allowed to charge a de minimis rate (10%) of program budget for administrative costs
  - Must be carved out of existing budget so talk with your MOH DO
- HUD also allows reimbursement to providers with an approved indirect rate
  - If you have an approved indirect cost rate plan, reach out to your MOH DO. This must also be disclosed as part of your annual renewal application

CoC 24…getting ready!
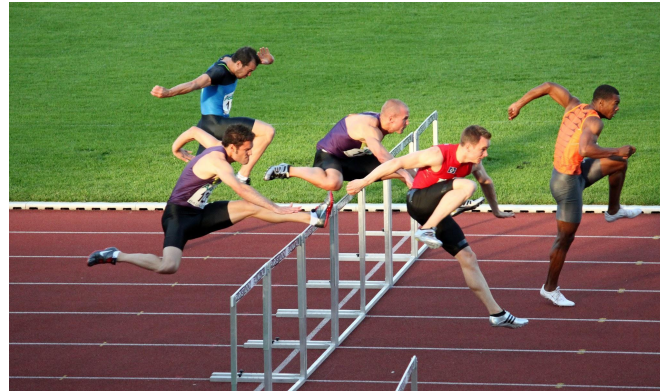
CoC 24 preview

- Registration for CoC 24 closed on 3/7/24
  - MOH will submit to apply as the Collaborative Applicant
- Anticipate Summer timeframe for NOFO response
- New this year….2 year cycle
- Do not anticipate competing for bonus projects this round
  - Need to provide solid onboarding and support for 4 new CoC 23 projects
- Anticipate updating board on CoC 24 late spring
  - Approval of oversight process for competition-related decisions
    - CoC Strategic Funding Oversight Committee
    - Reach out to katie.cahill-holloway@boston.gov

CoC 2024 preview

- New Projects:
  - Reallocation or Expansion
- Renewals- MOH will continue to use an automated scoring tool
  - Generated from warehouse data, pay attention to data quality
  - Time frame likely AHAR year / Federal Fiscal Year - 10/1/22- 9/30/23
- Participation in Self Monitoring and LMS training
- Completion of Equal Access Assessment and certification

2024 Program Monitoring

- This year the Boston CoC will continue its self-monitoring program for Boston CoC Providers. Monitoring provides information to assure that recipients are using CoC funding efficiently and effectively in accordance with federal law, HUD guidelines, and standards established by the Boston CoC.

- The objectives of the Boston CoC Provider Program Self-Monitoring are to:
  - Create an opportunity for provider staff to learn about CoC regulations, gain clarity on the implementation of complex programs, and ensure compliance with HUD eligible costs and activities
  - Address and help resolve performance concerns related to recordkeeping, procedures, policies, and outcomes
  - Risk assessment to determine Fall on-site monitoring schedule
  - Inform Boston CoC 2024 HUD Notice of Funding Opportunity (NOFO) project scoring
  - Coordinate sharing of best practices that emerge from the monitoring process
  - Ensure consistency in how providers implement their CoC-funded programs

2024 Program Monitoring

- Monitoring Process
  - Providers will be asked to complete a file review of 5-10 files per funded project type.
  - After the file review is complete the provider will complete a Provider Self-Monitoring report (one for each funded project) that includes file review checklist summaries along with additional financial, performance, and HMIS questions

- Agency/Project Selection
  - Providers funded during the CoC 21 period were selected for self-monitoring
  - Providers that participated in last year's self monitoring and who then had an on site monitoring by MOH will have a modified process
  - SSO-CE Projects are excluded from this round as the Boston CoC updates its CE process

- Period Under Review
  - The period under review is for contracts funded during the CoC 21 funding period
    - 1/1/22 - 12/31/23

2024 Program Monitoring Self-Monitoring File Checklist

- The participant file review component involves review of participant files for compliance with recordkeeping regulations.

- The provider should randomly select between 5 and 10 participant files to review

- For each participant file review selected the Boston CoC Project Monitoring file checklist should be completed.

Boston CoC Provider Self-Monitoring File Checklist

File Review Checklist for Agency Fiscal and Program Compliance

	Topic	Yes/No	Notes/Follow up
1.	Is there verification of all sources of income?	☐ Yes ☐ No	
2.	Is the rent charged accurately with proper deductions and utility allowances?	☐ Yes ☐ No	
3.	Is there a utility chart included in the rent calculation?	☐ Yes ☐ No	
4.	Is the household charged any fee other than rent?	☐ Yes ☐ No	

File Review Checklist for Participant Eligibility-Services and Termination

	Topic	Yes/No	Notes/Follow up
1.	Does the file contain adequate documentation of homelessness that covers the participants time of entry into the program? (see Provider instructions for further details on what is adequate documentation)	☐ Yes ☐ No	
2.	Where chronic homelessness is required for entry into a project (PSH) does the file confirm that there is acceptable evidence of the qualifying household's chronic homeless status at time of entry? (see Provider instructions for further details on what is adequate documentation)	☐ Yes ☐ No ☐ N/A	
3.	Is there a funder release of information in the file?	☐ Yes ☐ No	
4.	Is there evidence of an intake form (e.g. HMIS data standard, Front Door Triage, agency intake form)?	☐ Yes ☐ No	
5.	Is there identification for the head of household (e.g. shelter, state issued id, passport)?	☐ Yes ☐ No	
6.	Are there service plans i.e. ISP (Individual Service Plan) or similar documentation of case management engagement offered? Note: there must be evidence of engagement by program staff.	☐ Yes ☐ No	
7.	Is there evidence of referrals to mainstream benefits, including MassHealth and/or other health resources?	☐ Yes ☐ No	
8.	Is there evidence of at least annual assessments of service needs to ensure mainstream benefits are received and renewed?	☐ Yes ☐ No	
9.	Is there evidence of housing search?	☐ Yes ☐ No	
10.	Is there evidence of housing stabilization services?	☐ Yes ☐ No	
11.	Is there a supervisor review/quality control process of the file?	☐ Yes ☐ No	

	Topic	Yes/No	Notes/Follow up
12.	Has the household been terminated from the program? If 'yes', note the reason for termination and if due process applied to termination.	☐ Yes ☐ No ☐ N/A	**Reason for termination:**
13.	Is there evidence of the household's destination after leaving the program?	☐ Yes ☐ No ☐ N/A	
14.	Did the household go to a permanent housing destination at exit?	☐ Yes ☐ No ☐ N/A	
15.	Are there client surveys of other forms of feedback regarding the program at program exit?	☐ Yes ☐ No	
16.	Did the file have a change in family composition or income over the course of the year? Was the change documented?	☐ Yes ☐ No	

File Review Checklist for Housing Quality Standards (HQS), Lease Terms, Rental Assistance Provisions

	Topic	Yes/No	Notes/Follow up
1.	Is there a completed HQS report at initial lease up?	☐ Yes ☐ No	
2.	Is there a completed HQS report for annual inspection?	☐ Yes ☐ No	
3.	Is there documentation of reasonable accommodation at the initial lease up and annually thereafter?	☐ Yes ☐ No ☐ N/A	
4.	Does the household have a lease, with an initial term of at least one year?	☐ Yes ☐ No	
5.	**For RRH programs**: Is there a length of rental assistance established? If so, how long is the rental assistance provided for this household?	☐ Yes ☐ No ☐ N/A	**Rental Assistance length of time:**
6.	**For RRH programs**: Was there evidence of a re-assessment of service needs, at least annually to evaluate whether the household lacks sufficient resources and supports to continue to receive RRH financial assistance?	☐ Yes ☐ No ☐ N/A	

2024 Program Monitoring Self-Monitoring Report

- After completing the file review process the provider should complete this form in its entirety.
- You will use the information gathered using the Case File Checklist Form to complete sections of this report.
- Please be sure to complete each question and provide written explanations where appropriate and requested.
- In the form you will see instructions "see provider instruction manual for further instructions".

Agency Name	
Provider staff point of contact name and contact information	
Project Name (HUD CoC Grant Name)	
Does the agency internally refer to the project by any other name? If yes, list the name	
HMIS ID & HMIS Project Name	
Subrecipient Agency Name (if different than agency above)	
Primary contact at project agency (name and email)	
CoC Funding year/ ESG-CV Funding period	CoC 20
Project operating year monitored	
Grant identification number	

PART B: Agency Fiscal and Program Compliance	
Budget and Fiscal Compliance	Answer/Observation
Are there effective internal controls over, and accountability of CoC funds at your agency?	☐ Yes ☐ No What is the date that the internal controls policy was last updated?
Was the last project APR submitted on-time (30 days after the project operating year end date)?	☐ Yes ☐ No Date submitted:
Does your agency have written policies and procedures ensuring that the project funds are used in accordance with requirements and sufficient records to enable MOH to determine whether project requirements are being met?	☐ Yes ☐ No
Does your agency have an organizational chart that illustrates the lines of rity/responsibility?	☐ Yes ☐ No Please submit organizational chart and staff list with this report (see Provider Self-Monitoring Instruction Manual for more details on requirements)
imary duties for key employees defined?	☐ Yes ☐ No
he chart of accounts include a complete of the account numbers used to support ntrols required to ensure that resources to not exceed resources authorized?	☐ Yes ☐ No
normal course of the position's ements, are duties segregated to vely reduce the opportunity for someone petrate or conceal errors or larities?	☐ Yes ☐ No

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PART D: Program Eligibility, Services and Termination (summary of results from self-assessment file checklist)	
Program Performance	Answer/Observation
Capturing Review Results for Homeless Documentation in File Review (Case File Review Form, Part D question 1)	# files where documentation is present and sufficient ____ # of files where documentation is present but insufficient ____ # of files where no documentation is present ____ # of files where participant doesn't meet criteria ____
Capturing Review Results for Chronic Homelessness (PSH)	# files where documentation is present and sufficient ____ # of files where documentation is present but insufficient ____ # of files where no documentation is present ____ # of files where participant doesn't meet criteria ____
Is there evidence of annual recertification paperwork in all applicable files?	☐ Yes ☐ No ☐ Not applicable
Are there an 'intake' form(s) (e.g. HMIS, Front Door Triage, agency intake) for all participant files reviewed?	☐ Yes ☐ No
Are there service plans i.e. ISP (Individual Service Plan) or like documentation of case management engagement offered for all participant files reviewed?	☐ Yes ☐ No
Is there evidence of referrals to mainstream benefits, including MassHealth, for all participant files reviewed?	☐ Yes ☐ No
Is there evidence of a minimum of annual assessment of service needs to ensure mainstream benefits are received and renewed, for all participant files reviewed?	☐ Yes ☐ No
Program termination should always be seen as a last resort and only for gross misconduct. Within any "terminated" files reviewed, were	☐ Yes ☐ No

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2024 Program Monitoring

- A quick guide that provides high level overview of process, timeline, submission instructions/requirements, and other helpful information to complete the self-monitoring work

2024 Boston CoC Provider
Self-Monitoring Instruction Manual

Updated March 2024

2024 Program Monitoring - timeline

- Submission Requirements and Instructions
  - **Provider Meeting**: May 7, 2024- Boston CoC Provider Meeting to provide overview of self-monitoring program

  - **Notification**: May 13 - 14, 2024 providers emailed instructions and forms

  - **Self-Monitoring**: May 14, 2024 - June 10, 2024 providers perform self-monitoring process

  - **Document Submission**: June 11, 2024 providers submit documents to MOH

  - **Document Review**: MOH reviews provider's submissions 2-3 weeks

  - **Monitoring Feedback**: Within 3 weeks of document review completion

  - **Post Monitoring Tasks**: to follow monitoring feedback

  - **On-Site MOH Monitoring Visits**: Fall 2024

2024 Program Monitoring

- Documents that will be submitted (see instruction manual for greater detail)
  - Boston CoC Provider Self-Monitoring Report (full)
  - Updated Organizational Chart (full)
  - Staff List (full)
  - Program's General Ledger showing your agency's total match contribution over the course of the operating year (full & modified)
  - Most recent audited financial statements (full & modified)
  - Warehouse Data Quality Report (DQ) (full)
  - Project Annual Performance Report(APR) (full)

- Emailed to your project's MOH Development Officer

2024 Program Monitoring- Modified Process

- ● Completion of required LMS courses

- ● Completion of of Equal Access assessment
  - ○ Submit certificate of completion

- ● Submission of most recent audit to MOH Compliance Unit

- ● Match report for most recently completed CoC program year

2024 Program Monitoring

- What's next?
  - Agencies will be receiving emails from the SHD team with the forms and tools needed. Everyone will receive their documents by Tuesday, May 14 or sooner
  - Materials are due to your MOH Development Officer by June 11, 2024

- Self-monitoring was newly launched in 2023 and the process allowed for a more streamlined CoC 23 NOFO project review.

- Questions???   Email your MOH Development Officer
  - Adelina.Correia@boston.gov
  - Katie.Cahill-Holloway@boston.gov
  - Laura.Rivera-Davis@boston.gov
  - Caroline.McCabe@boston.gov
  - Kiarah.Perdomenico@boston.gov
  - Yahaira.Bautista@boston.gov
  - Nathan.Satish@boston.gov

HMIS Updates

- HMIS monitoring has been folded into the overall project monitoring for those programs that are MoH-CoC funded.

- Point in Time Count and Housing Inventory Chart reports are due to HUD on 5/10 so HMIS Team finalizing

- HMIS Data Standards updated in October 2023, HUD has recently announced there will be no changes until FY 2025.

- HMIS specific LMS courses continue to be developed and rolled into the New User courses for Clarity and the Warehouse. These courses tend to be specific "definitional trainings" on topics such as Housing Move-In Date.

- Continue to utilize the Help Desk for HMIS concerns including assigning these new courses to staff or other reporting and software issues.
https://www.boston.gov/departments/housing/boston-continuum-care-coc-help-desk

Coordinated Entry Updates

Introducing Maria Santos!!

- Incorporated Rapid Rehousing in CE
- Incorporated Housing Navigation in CE

New prioritized categories:
- Barriers to housing (for RRH & Housing Navigation)
- High Service Need (for Unsheltered)

New CE Newsletter! - Sign up here

New CE Drop In Hours
Wednesday alternating weekly to offer morning and afternoon hours (10-11 AM and 2-3 PM).

Population	Prioritization%	Per Opportunities
Mid-term stayers	40%	8 out of 20
Long term stayers with barriers to housing	35%	7 out of 20
Long-term stayers	25%	5 out of 20

Population	Prioritization %
Long-term Stayers	25%
Long-term Stayers with barriers to housing	25%
Mid-term Stayers	15%
Mid-term Stayers with barriers to housing	20%
Low Threshold Sites without Navigation	5%
Individuals with non-CoC mobile vouchers	5%
People fleeing Domestic Violence	5%

Q&A

Questions?

Closing

Thank you for attending today's meeting.

Please feel free to send any feedback on this meeting to your MOH DO