

2015 Evaluation Instrument Training

Advanced Training

Presented by Amanda Borta and Loren Seeger
January 29, 2015 11am-12pm



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Introductions

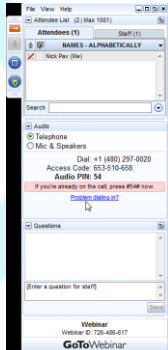
- Amanda Borta, Program Manager
- Loren Seeger, Program Manager
- Elizabeth Perez, Program Associate



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Webinar Housekeeping

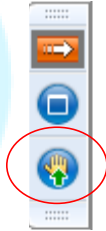
- Mute
- Audio Troubleshooting
 - If you are having difficulty hearing us, please join the webinar via phone
 - Click on "Audio" and then click "Telephone". Please follow dial in instructions
- Questions
 - Chat Box





Questions and Answer

- Click the “raise hand” button to be called on
- Once called on, you will be unmuted to ask your question
- Please ask only 1 question – if you have additional questions, please utilize the chat box function





Training Materials

- The following items are posted on website www.allchicago.org
 - PowerPoint Slides
 - Evaluation Instrument [Instruction Manual](#)
 - Evaluation Instrument – PDF version
 - [Agency Component](#)
 - [Project Component](#)



Training Objectives

- To ensure all agencies know and understand:
 1. What the Evaluation Instrument is
 2. How it is used to determine funding priorities for Chicago
 3. How to successfully submit the Evaluation Instrument on time



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Common Terms and Acronyms

- HEARTH Act = Homeless Assistance and Rapid Transition to Housing Act
- CoC = Continuum of Care
- CoC Program = Continuum of Care Program (this includes former Supportive Housing Program (SHP) AND Shelter Plus Care (SPC))
 - Shelter Plus Care aka Long Term Rental Assistance (LTRA)



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Common Terms and Acronyms

- HUD Program Model Types
 - PH = Permanent Housing
 - TH = Transitional Housing
 - SSO = Supportive Service Only
 - SH = Safe Haven
 - ES = Emergency Shelter



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Common Terms and Acronyms

- APR = Annual Performance Report
- 625 HUD CoC APR = Report pulled from HMIS to provide information for the Annual Performance Report (APR)
- HMIS = Homeless Management Information System
- ART = Advanced Reporting Tool
- ATA = Agency Technical Administrator



Evaluation Instrument Context

- Developed and updated annually by HUD McKinney-Vento (HMY) Committee
- Evaluation Instrument Results Usage
 - Chicago Planning Council on Homelessness (CoC Interim Board of Directors)
 - Ranking Policies – HEARTH Funding Opportunities Task Group



Evaluation Instrument Context

- Based on HUD (HEARTH) and local (Plan 2.0) priorities
- HUD application – to be released later this year



What's New for 2015

- Unscored Last Year
 - Unscored CRS question is scored for 2015 (if applicable)
- Project Performance contains minor edits and adjusted formulas
- Certification Checklist / Site Review – separated by section titles
 - HMIS section in Agency Component moved to Checklist
- HMIS ART Report Dates: 2014 calendar year
- Comparison to previous year: 2013 calendar year



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Evaluation Instrument Context

- Evaluation Instrument Criteria

Evaluation Instrument Section	Points in Agency Component	Points in Project Component	Total Points Allocated
Threshold	No points – Required for Renewal		
Additional Financial Review	No points – Required for Renewal		
Agency Certification and Site Visit Requirements	0	-	0
Project Certification and Site Visit Requirements	-	0	0
Agency Governance	5	-	5
Project Operations	-	11	11
Homeless Management Information System (HMIS) Implementation and Data Quality	-	16	16
Consumer Focus and Representation	12	-	12
Leading Practices – Housing First	-	12	12
Project Performance and Consumer Outcomes	-	32	32
System Priorities	-	12	12
Totals	17	83	100



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Who Should Submit?

- Agencies with a CoC-funded Project or a former Shelter Plus Care (SPC) project that was operating between January 1, 2014 to December 31, 2014 if project intends to apply for renewal
- Any agency interested in changing Program Component must adhere to New Projects Process – information coming soon
- Any agency not interested in renewing a CoC grant, must contact the Alliance ASAP



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Questions and Answer

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- Up Next...





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Submission Information

- Online Submission via SurveyGizmo.com



- Paper submissions **will not** be accepted. For further information, please review the Submission Policies section in the Instruction Manual.



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Submission Information

- Agency Component – One per agency
– <http://bit.ly/2015EIAgency>
- Project Component - One for each project
– <http://bit.ly/2015EIProject>
- Note: Separate links for each component



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Submission Information

- Agency Component – One per agency
- ✓ Threshold
- ✓ Financial Review
- ✓ Agency Certification Checklist
- ✓ Agency Governance
- ✓ Consumer Focus and Representation



Submission Information

- Project Component - One for each project
- ✓ Threshold
- ✓ Project Certification Checklist
- ✓ Project Operations
- ✓ HMIS Implementation and Data Quality
- ✓ Leading Practices
- ✓ Project Performance and Consumer Outcomes
- ✓ System Priorities



Submission Information

- Accessing Online Surveys
- Save and Return
- Uploading Attachments
- Final Review



Submission Information

- Accessing Online Surveys
 - Links on our website and sent via email
 - Anyone can access – no username/password
 - Will not be able to skip around within survey pages
 - Enter online survey once you have information and attachments ready
 - Save PDF version and review prior to submission

Submission Information

- Save and Continue Later
 - Enter email. A link will be sent to you
 - Only need to do this once
 - Save email to your computer as name of project for easier retrieval later!



Submission Information

- Uploading Attachments

50. Attach APR ART Report 625 (1 MB File Size Limit)

1. No file selected

1. Click "Browse" to find document on computer
2. Click "Click Here to Upload File" to upload file
3. Once complete will appear as below:

File: HIMS_Utilization Threshold.docx

Submission Information

- Naming Conventions
 - Each question will have a sample of the name you should save your file as for attachments
 - Prior to uploading attachment, save file as sample name

If No, attach an explanatory letter for review by a committee of the Chicago Planning Council on Homelessness. (1 MB File Size Limit)
Save file as: "Agency Name_DVThreshold"



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Submission Information

- Final Review
 - Click link to download PDF of response
 - Ensure all responses are correct (Including attachments!)
 - If submitted prior to deadline and need to make modification – **must re-submit entire component**





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Submission Information

- Confirmation Email
 - Once submitted, please ensure confirmation email has been delivered to your inbox (Primary Contact)
 - Save confirmation email to your computer



Thank you for submitting the 2015 HUD CoC Competition Evaluation Instrument - Project Component for a. Please accept this email as the receipt of submission. Reminder: The 2015 HUD CoC Competition Evaluation Instrument submissions for your agency is not complete until you have received an email confirmation for one Agency Component and a separate Project Component for all CoC-funded programs. Please contact CoCPrograms@allchicago.org if you required any additional information. Sincerely, The Chicago Alliance CoC Programming Team



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Submission Tips

- Utilize PDF prior to accessing SurveyGizmo
- Only one staff person at a time
- Encouraged to submit prior to deadline
- Review Instruction Manual for detailed information on specific questions
- If after reviewing Instruction Manual and FAQs still have questions, contact Alliance staff



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Submission Information

- Agency and Project Components are **due by online** submission no later than

5:00PM on February 20, 2015



- Be sure to review Submission Policies section in Instruction Manual – *Updated for 2015!*
 - *New: Technical Deficiencies Policy*



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Review Process

- Alliance staff will review all 180+ evaluation submissions
- Preliminary Scores Issued
 - Tentatively scheduled for March 6th
 - Review score cards carefully and submit appeals as necessary



Review Process

- Appeals Process
 - Agencies will have **1 week** to submit appeals
 - Format updated for 2015
 - Appeals are reviewed by subcommittee of the Planning Council (CoC Interim Board of Directors)
 - All decisions of the Appeals Committee are final



Review Process

- Final Scores Issued
 - *Tentatively* released March 30th (subject to change)
 - Final scores will incorporate any points given to agency as result of an approved appeal
 - These scores will be used as one of the criteria for the CoC's ranking policies



Program Models Overview

- Program Models Chart

HUD Component Type (Chicago Program Model)
• Permanent Housing (Permanent Supportive Housing)
• Safe Haven (Safe Haven)
• Transitional Housing (Interim Housing, Permanent Housing with Short Term Supports, Permanent Housing for Youth – Project Based)
• Supportive Services Only (Wrap Around Services)
• Long-Term Rental Assistance (LTRA), formerly Shelter Plus Care (SPC) (Permanent Housing)
- Utilizing 2010 Program Models Chart
 - 2014 revised Program Models Chart now available, but not incorporated into Evaluation yet



Attachments Overview

- Agency Component:
 - Threshold and Additional Financial Review
 - Audit Report (financial statements and letter) must be within 9 months of end of fiscal year
 - A133 (if applicable)
 - IRS Form 990
 - Employer's Quarterly Federal Tax return Form 941
 - Consumer Rights Document
 - Must address and clearly describe all items



Attachments Overview

- Project Component
 - Threshold
 - Most recently submitted APR (e-snaps)
 - HUD CoC APR 625 Report from HMIS (Excel)
 - Will be uploaded with Performance section
 - Used to verify Bed Utilization Threshold
 - HMIS Section:
 - HUC CoC APR for the dates of January 1, 2014 to December 31, 2014 in **PDF format**



Attachments Overview

- Match and Leverage Spreadsheet
 - Updated for 2015, Use only 2015 M/L Spreadsheet
 - Enter information into yellow fields, others will auto-calculate
 - Be sure to indicate required MOUs (in-kind)

2015 Match and Leverage Table

Reserve Fund			Project Fund	
CASH Match Source	Type of Source	Value (\$)	Total Grant Amount	Match Table Instructions
EMERGENCY FUND	Reserve Fund	\$1,000,000	\$1,000,000	<p>Match Table Instructions:</p> <ul style="list-style-type: none"> 1. Enter Reserve Fund in column 1 2. Enter Project Fund in column 2 3. The total amount in column 3 must equal the Match Table total. 4. Enter the amount in column 4 that is the amount of the in-kind match. If the amount is zero, enter 0. 5. The amount in column 5 must be the amount of the in-kind match. If the amount is zero, enter 0. 6. The amount in column 6 must be the amount of the in-kind match. If the amount is zero, enter 0.
CHICAGO ALLIANCE	Reserve Fund	\$500,000		
CHICAGO ALLIANCE	Project Fund	\$500,000		
CHICAGO ALLIANCE	Project Fund	\$500,000		
			Ending Amount in State	
			Total Grant Match	
			Total	



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Attachments Overview

- SSO Projects Only – Functionality Chart
 - Worksheet same as previous
 - Scoring has been adjusted:
 - Maintained, Increased, Did not maintain or increase outcome

	Service Component	Desired/Expected Outcome	Benchmark	Measurement Tool	2013 % that met outcome	2014 % that met outcome
O15						
O16						

SSO Functionality Worksheet Instructions
 (complete items in green)
 1. Service Component: The drop-down list is populated based on services listed in the Program Models Chart.



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Attachments Overview

- Project Performance and Consumer Outcomes
 - Must submit data from HMIS: ART Report- HUD CoC APR 625 (Excel format)
 - Will be prompted based on Program Model Type response
 - **All Projects:** January 1, 2014 to December 31, 2014
 - **IH, PH-Y, PHWSS:** January 1, 2013 to December 31, 2013
 - Needed in order to calculate comparison to previous year
 - Be sure full report is attached and that dates are correct (last page)



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How do Percentiles work?

- Percentiles: Review [Scoring Guide](#) for details
- Not the same as *percent ranges* (i.e. responses over 90% do not automatically receive full points)

Let's say there are 20 Responses for Q. X(% exit to PH): 95%, 95%, 93%, 92%, 90%, 85%, 83%, 80%, 78%, 75%, 72%, 70%, 65%, 55%, 33%, 10%, 0%, 0%, 0%, 0%

The scoring criteria is as follows: 5 points – 90th percentile, 4 points – 80th percentile, 3 points 70th percentile, 2 points – 60th percentile, 1 point –50th percentile, 0 points – below 50th percentile

As explained, the top 9% would receive the full 5 points, which in this case would be those highlighted in red. This is because 90% (18 out of 20) of the scores fall below these two scores, therefore establishing the 90th percentile. The scores highlighted in green would receive 4 points, because 80% of the scores fall below 92%, and so on. The last ten responses listed would not receive points, because they fall below the 50th percentile, meaning the last 50% of values fall below 75%.



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Attachments Overview

- Project Performance and Consumer Outcomes Calculation Worksheet – not required to be attached, but should be utilized
- Updated for 2015 – Deceased clients can now be removed from some calculations

Project Performance and Consumer Outcomes Calculation Worksheet Project Component, Section F. Project Performance and Consumer Outcomes			
Interim Housing (IH) & Permanent Housing with Short Term Supports (PHwSTS)			
Question Number	Formula <small>This column shows the basic formula for answering the question.</small>	APR Calculation Formula <small>This column shows how to calculate the answer to the question from the 625 APR Report data.</small>	Agency Calculation <small>Project should complete the calculation in this column, using the APR formula to the left.</small>
IH-Q2 & PHwSTS-Q3	current year # who exited to PH	Q29x1: Perm. Dest. Subtotal (row), Total (column) + Q29x2: Perm. Dest. Subtotal (row), Total (column)	Then $\frac{(\text{---} * \text{---})}{\text{---}} + \frac{\text{---}}{100} * \text{---}$



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Appendices Overview

- Appendix and website contains links to the following documents
 - Match and Leverage Spreadsheet
 - Project Performance and Consumer Outcomes Calculation Worksheet
 - How to run the HMIS ART 625 Report and Chronic Homeless Report
 - SSO Functionality Worksheet
 - Program Models Chart



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Appendices Overview

- Any questions regarding the HMIS ART 625 Reports and Chronic Homeless report, please contact your agency ATA and/or HMIS

hmis@thechicagoalliance.org



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- Up Next. . .





Important Reminders

- Agency and Project Components are due by online submission no later than

BY 5PM ON FEBRUARY 20, 2015





Important Reminders

- Late Submissions will NOT be accepted
- Projects that fall below 2 standard deviations will receive technical assistance from Alliance staff

For detailed information on policies please review the Instruction Manual

- If your agency is NOT interested in renewing the grant, please contact the Alliance



Closing Information

- Contact Information: cocprograms@allchicago.org
- Contact Information: 312-379-0301
 - Amanda Borta – extension 22
 - Elizabeth Perez – extension 20
 - Loren Seeger – extension 35



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Thank You

Thank you for joining us!

Deadline Reminder:

February 20th no later than 5pm!
