



Standard for Public Good Accounting and Reporting in Street Outreach Services in Homelessness

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This Public Good Measurement and Reporting Standard is issued by the
Public Regional Outcomes Standards Board.

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Objective

The PROS Board issues these regional standards on homeless street outreach to increase the likelihood an individual experiencing homelessness will end their homelessness permanently and as efficiently as can be reasonably expected in our region. Additionally, these standards are issued to facilitate clarity in the reporting of successful outreach, allowing for more economical distribution of valuable community resources for homelessness service providers, funders, and municipal leaders.

Intended Regional Effects of Issuing This Standard

When organizations that engage in street outreach provide the consistent reporting required within this regional standard, the balanced set of metrics will permit investors to judge their effectiveness and efficiency in street outreach and be able to separate those common factors that may have led to continued homelessness for those who have been engaged by an outreach worker. An investor should be able to make a reasonable judgment as to what constitutes performance from their lens for an organization conducting outreach programs whom they are considering funding.

Similarly, organizations conducting outreach programs should be able to utilize this balanced set of metrics to make strategic and operational decisions on their outreach efforts. Specifically, these balanced metrics will help organizations conducting outreach programs to identify areas of strong performance for potential increased focus to build on what works. These metrics will help organizations conducting outreach programs identify areas of weak performance to decide if, in the event the area of weak performance is internal, whether operational improvement is necessary. Alternatively, in the event the area of weak performance is external (e.g., market conditions like shelter availability), whether outreach is aligned with the organization's strategy.

Other Regional Purposes Outside the Focus of This Standard

The PROS Board acknowledges that it is more likely than not that resources in the system of homelessness services in San Diego County are not optimized to the needs of the individuals experiencing homelessness. That is, it is possible that, due to the limit in aggregate resources, investors could be putting more funds into areas of service like outreach than into other areas of service like mental health, and that such tradeoffs could result in both efficiencies and inefficiencies in the system. It is also possible that investors may be limiting organizations to work only within certain geographies (e.g., a public body disallowing acceptance of an outreach referral from outside its jurisdictional borders). While this standard will help organizations conducting outreach programs enhance trust with their outreach-focused investors, this standard alone will not create the needed transparency within and around the entire system of homelessness services, including services outside of outreach. As such, it cannot be used to make multivariate resourcing or investment decisions involving other areas of service. Other regional standards in diversion or real-time housing demand or supply will tackle these issues.

Finally, this standard acknowledges the San Diego Continuum of Care's (SD COC) [outreach operational requirements](#) for organizations, and this PROS Board standard creates consistency and uniformity in

reporting for organizations following those operational requirements. This standard neither augments nor replaces the SD COC operational requirements; it merely creates rules on how organizations report on street outreach when they are or are not in compliance with those operational requirements.

Standards of Public Good Accounting and Reporting

Scope and Scope Exceptions

These standards apply to outreach programs, including organizations conducting interventions that focus primarily on supporting individuals living unsheltered with accessing permanent or temporary housing by building trusting relationships and ongoing rapport. Organizations in scope include those conducting iterative engagement with the goal of moving clients toward achieving material goals. Essentially, organizations conducting street outreach with the expressed intent to provide housing-focused street-based case management services are in scope.

Organizations excluded from these standards are those who engage with persons experiencing homelessness but do not intend to build trusted relationships with them in the aim of ending their homelessness condition permanently. For instance, an organization solely dedicated to research on homelessness does not fall within the scope of this standard; while that organization may have the opportunity to build trust, that is not their stated intention. Furthermore, a law enforcement organization would be outside the scope of this standard if its main purpose in its engagement with persons experiencing homelessness is enforcement of local rules and not trust building or subsequent referral to services or housing. Finally, a street medicine outreach team without any service coordination component is not in scope.

Key Terms

Current Living Situation (Formerly “Contact”). (Same as RTFH definition) Street outreach projects are expected to record every contact made with each client in the HMIS through the “Current Living Situation” program assessment. A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the street outreach worker and the client about the client’s well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A Current Living Situation must be recorded anytime a client is met (including on the same date the client is enrolled into the program (i.e., the Project Start Date) as well as the Date of Engagement (which will be defined below).

Emergency Shelter. (same as San Diego Regional Task Force on Homelessness [RTFH] definition) low-barrier temporary housing program, in which households experiencing homelessness are provided emergency access to shelter and services without unnecessary barriers or prerequisites to assistance. Emergency Shelters provide services to meet the immediate safety and survival needs of the individual or family served, which may include shelter, food, clothing and other support services while being housing

focused to help participants enter permanent housing." Shelters funded by SDHC & City of San Diego do not "provide shelter for a specific time-period" as stated here, max lengths of stay are not a best practice in this CoC, and maximum lengths of stay are not mentioned in the RTFH Community Standards.

Engaged clients. Clients who have established an interactive client relationship with an outreach worker that has resulted in a deliberate client assessment or beginning of a case plan.

Engagement/Date of Engagement. (Same as RTFH definition) Engagement date is the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. The date of engagement should be entered into HMIS at the point when the client has been engaged by the outreach worker. The date may be on or after the date that the client is enrolled in the program (project start date) and must be prior to the date the client exits from the program. If the client exits without becoming engaged, the engagement date should be left blank.

Enrolled clients. Persons with whom the outreach worker has had at least one contact and enrolled into their project in HMIS.

Housing-related case management program. A program that does not meet the criteria as an Outreach Program, but does provide housing navigation services with the expected outcome of permanent housing with or without rental assistance. Examples of such programs include CalAIM Housing Navigation Community Support, the County's Community Care Coordination programs, although other programs meeting this description would be included.

Permanent Housing. The US Department of Housing and Urban Development defines permanent housing as "a community-based housing model, the purpose of which is to provide housing without a designated length of stay. PH program participants must be the tenant on a lease (or sublease) which must:

- Have an initial term of at least one year
- Be renewable for a minimum term of one month
- Be terminable only for cause"

According to the HUD definition, permanent housing includes Permanent Supportive Housing for persons with disabilities and Rapid Re-housing. The PROS Board expands this definition to include Housing Choice/Emergency Housing Vouchers, placements, or other housing solutions funded by client, third party or at no cost to client.

Positive Exit. any destination that is not unsheltered homelessness, jail, or death. For more information on positive exits, see the Department of Housing and Urban Development's (HUD) [System Performance Measure 7a](#) and [Housing Destination Summary](#).

Program Enrollment/Project Start Date. (Same as RTFH definition) The date that a client is first assisted by your program. For outreach programs, this means the date of first contact with the client.

Project Exit Date. (same as RTFH definition) Exit from a program in HMIS represents the end of a client's participation with a program. The exit date should be entered on the date the client is no longer considered to be

participating in your street outreach program. This can be harder to determine for street outreach programs than other program types because of the inconsistent/irregular nature of your contacts with a client. However, there are a number of reasons you may use to determine that a client has exited your program, including:

- The client has entered another project type (e.g., Transitional Housing, Permanent Supportive Housing) or otherwise found housing).
- The client is engaged with another outreach worker or program;
- The client is deceased;
- The client has been auto-exited

Recognition – Initial and Subsequent Measurement

Organizations in scope shall initially and subsequently recognize enrollment, engagement, and positive exits as defined in the Key Terms section.

Presentation on Performance or Financial Reports

The PROS Board understands that at this early stage of the development of regionally accepted public good measuring and reporting standards, there are no standardized public good reporting formats. In other words, there is no public good reporting analogue to the balance sheet or to a profit and loss/activities statement and thus no standard report where the disclosures or presentation of public good reports that this rule requires can yet be placed. Hence, this section creates additional notes or commentary through existing standardized financial or other performance reporting until such standard reporting formats can be developed. In the interim, this rule also offers an appendix with illustrative examples that will change in future versions of this rule.

In the Notes of Statements of Activity

Organizations conducting outreach programs shall report conspicuously in the notes of any statements of position the following measurements for that date of the financial position:

1. Total number of clients served
2. Number of clients enrolled
3. Number of clients engaged
4. Number and proportion of clients who entered into emergency shelters or received hotel or motel vouchers
5. Number and proportion of clients who entered into permanent housing
6. Average amount of time between engagement and positive exits
7. Number and proportion of clients who gained or increased income from start to exit
8. Number and proportion of clients exited by referral to a housing-related case management program

If it is not feasible for an organization to report on points 6, 7, and 8 then it should report why it is not feasible to do so (e.g. lack of data availability, limited staff capacity to track data).

If the organization has grants or pledges receivables for outreach services specifically, those amounts should be accounted for separately from the grants or pledges receivables either explicitly on the statement of financial position or conspicuously in the notes related to grants or pledges receivables.

If the organization spends any flexible funding dollars while performing outreach activities, those amounts should be accounted for either explicitly on the statement of activity or conspicuously in the notes related to activities.

If conducting street outreach in a sufficiently large geographic area that impacts availability of services, the organization may elect to provide the above information additionally into geographic subdivisions. Such geographic subdivisions, if used, should be identifiable in public records, like zip codes, school catchment zones, a city's subdivisions, etc.. It should not be a geographic subdivision that is proprietary.

If the organization has revenue or expenses for outreach services separate from other services provided, those amounts should be accounted for separately from revenue and expenses either explicitly on the statement of activity or conspicuously in the notes related to revenues and expenditures.

In Any Performance Reporting

If an organization conducting outreach programs publishes publicly available performance reports, like in an annual report, separate from financial statements, then the organization shall present the information in the previous subsection.

Disclosure Requirements

When reporting pursuant to this standard, the organization must disclose the methods by which it determined such measurements, and when independently audited or reviewed, the auditor or reviewer should make an evaluative statement whether those methods meet the intent of this standard.

Of note, this standard does not specify exactly where within reports or which notes on financial statements an organization must provide the information or disclosures required in this standard. See Appendix B for example applications of this standard.

Effective Date and Transition

This standard shall be effective 1 July 2023.

Organizations whose fiscal years end between 1 July 2023 and 31 October 2023 may wait for their subsequent fiscal year to begin to effect this standard. For any reports issued between 1 July 2023 and the

beginning of an organization’s fiscal year, the organization should minimally disclose its intention to transition to this standard in its following fiscal year.

Appendix A: Background Information

San Diego Continuum of Care Street Outreach Standards

The PROS Board acknowledges the existence of the San Diego Continuum of Care Street Outreach Standards, available online at on the [San Diego Regional Task Force on the Homeless website](#). This standard makes no evaluation of those requirements’ adequacy or efficacy, but merely creates measurement and reporting requirements for organizations conducting outreach programs with the regional acceptance of those COC operational requirements.

Basis for Conclusions

Housing as the Direct Result of Outreach

As demonstrated in section 16 of the San Diego Continuum of Care Street Outreach Standards, the primary focus of outreach is to get clients housed. The standards state that “Staff shall be knowledgeable of the housing process within and outside CE,” and that this knowledge is integral to moving clients toward housing. The metrics in this standard reflect outreach staffs’ knowledge of the housing process and commitment to moving clients toward housing.

Furthermore, these metrics will result in a high level of trust-building with funders and the public because they demonstrate outputs which tangibly affect public life. Through the metrics in this principle, providers can succinctly communicate to funders and to the public the volume of clients they serve and the outcomes for those clients. In other words, the public and funders are able to see the volume of work with which service providers are tasked, and they can fairly assess the efficacy of that work.

Alternative Views and Risk Areas That May Need Addressing in Future Revisions

While the PROS Board asserts the standard presented here provides a sufficient balance between activity and outcomes and also acknowledges that organizations have conditions outside their control, it is important to note that views on the interim goals and proper processes for outreach work may vary significantly.

Some experienced outreach workers have expressed thematically that any outreach is good outreach. The PROS Board notes that the standards here deviate from that assessment in that outreach is only recognized if concrete outcomes, which can be communicated to funders and to the public, are observed.

Outreach work is a complex process, and some service providers have communicated that the goal of outreach work is to build trust with clients, regardless of clients' ultimate outcomes. The PROS Board agrees that, when outreach work is done effectively, providers do naturally build trust with clients. However, trust built through outreach work does not equate positive outcomes for clients, nor is it publicly visible. The PROS Board asserts that the metrics included in this principle will reveal which organizations are building trust with clients because trust building will be reflected in client outcomes.

Some outreach workers have expressed concerns around the inability of these metrics to account for recidivism, or clients re-entering homelessness after being housed. The PROS Board asserts that the ultimate goal of outreach work is to house people experiencing homelessness. Interventions required to ensure that clients stay in housing include home visits, thoughtful design of housing vouchers, and supportive services to help clients maintain good health, find employment, and other important supports. In addition, PROS Board standard PROS-HOUD-Ma-504 outlines measurement and reporting guidelines for long-term housing outcomes of serviced clients.

Appendix B

Example Specific Applications of this Standard

Municipal Agencies with Homeless Outreach Teams

Municipal agencies with homeless outreach teams will need to consider in what financial and performance reviews the reporting pursuant to this standard are included. It seems wholly appropriate that, if addressing homelessness is a significant priority of elective office holders, then these measurements and reporting ought to be completed for Comprehensive Annual Financial Reports (ACFRs). Certainly these measurements and reports ought to be completed for reports of departments, like law enforcement if engaged deliberately in outreach services, or subordinate agencies, where applicable.

Service Providers with Substantive Portfolio of Outreach

At a minimum, service providers should detail the information pursuant to this standard in their audited financial statements and any annual performance reports.

Illustrative Examples for Reporting Possibilities

The following chart depicts an example report which an organization reporting in accordance with these standards should follow in its reports.

Fiscal year/time frame	2020	2020	2021	2021
geographic zone	92102	92103	92102	92103
# clients who entered transitional housing				
% clients who entered transitional housing				
# clients who entered permanent housing				
% clients who entered permanent housing				
avg time between engagement and positive exit				
# clients who gained or increased income from start to exit				
% clients who gained or increased income from start to exit				

Appendix C

Notes to Help Readers of Performance or Financial Reports Following This Standard

Potential Investors in an Outreach Provider

When considering initial or further investment in an outreach provider, there are several variables that an investor could consider. The relative importance of each variable might depend on the goals of the investor. For example, investors interested in housing persons experiencing homelessness might examine housing related indicators, such as the number of clients who entered into transitional housing and the number who entered into permanent housing. Investors interested in improving service access for persons experiencing homelessness might examine increases in client income, as those increases reflect on providers' abilities to connect clients to career-related resources. Investors interested more broadly in positive outcomes for persons experiencing homelessness might examine data related to clients' positive exits. Ultimately, this choice should reflect investors' desired outcomes from outreach services.

Investors should examine data reported in adherence to this standard in conjunction with other data which may affect the indicators reported, such as economic factors affecting housing stock or job markets. Investors who use these data to make strategic funding decisions should also consider the audiences targeted by each provider in order to ensure apples-to-apples comparisons. Specifically, investors should consider the likely acuity of clients serviced under distinct programs and use these metrics to compare across programs whose clients have similar acuity levels.

Board Directors or Executives of an Outreach Provider

When considering strategic or operational decisions on outreach, there are several pieces of derivable information that a board director or executive could use. Board Directors or executives may use these data to track performance over time or, for certain organizations, performance across geographic regions. Executives may use these data to inform budgetary decisions. For example, if a much higher proportion of clients are being housed in one region than in another, executives might elect to dedicate more resources toward outreach work in that region. These metrics also allow for concrete goal-setting and performance evaluation.