

HOMELESS SERVICES & HOUSING RESOURCES

RFP # 14026-2025

AGENCY APPLICATION

Instructions:

Each applicant agency (or group of collaborative partners) must submit one completed Agency Application. Program-specific information must be submitted separately in the appropriate Program Application(s).

Please limit the total length of your completed Agency Application – including the questions, tables and narrative responses – to no more than **7 pages**. Applications that exceed this limit may not be fully reviewed. This page limit does not include requirement attachments (e.g., financial audits or financial statements).

AGENCY INFORMATION

Applicant Organization:	The Road Home Dane County
Contact Person Name and Title:	Nicole Christen, Program Director
Address:	890 W Wingra Dr, Madison, WI 53715
E-Mail:	nicolec@trhome.org
Phone:	608-294-7998
Website:	https://trhome.org/
Federal Tax ID or EIN:	31-1618925
Unique Entity ID (UEI) Number:	JVVYARK9NT4
Legal Status:	<input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> General Partnership <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Unincorporated Association <input type="checkbox"/> Other: _____
Tax Exempt Status:	<input checked="" type="checkbox"/> Non-profit: 501 (c)(3) since April 1999 <input type="checkbox"/> For-profit with a primary mission focused on housing and homelessness

AGENCY REQUEST SUMMARY

Program Type	Request Amount
Homeless Services	
A. Homelessness Prevention	\$
B. Diversion	\$
C. Emergency Shelter	\$
D. Street Outreach	\$
E. Extreme Weather Hotel for the Unsheltered	\$
F. Rapid Rehousing (RRH)	\$
G. Permanent Supportive Housing (PSH)	\$

H. Other Permanent Housing (OPH)	\$112,224.00
I. Other Programs that Promote Pathways to Stable Housing	\$
Housing Resources	
J. Tenant Support	\$
TOTAL REQUEST	\$

AUTHORIZATION TO SUBMIT PROPOSAL

This application is submitted with the knowledge and approval of the organization's governing body. To the best of the undersigned's knowledge, the information provided is accurate and complete. The undersigned also certifies that they have reviewed and accept the terms and conditions outlined in the Request for Proposals (RFP).

Nicole Christen

06/27/2025

Signature

Date

AGENCY QUALIFICATION

1. AGENCY MISSION AND RELEVANT EXPERIENCE (10 POINTS)

1) Mission Statement: Provide your agency's mission statement.

The Road Home Dane County provides opportunities for homeless children and their families to achieve self-determined goals and affordable, stable housing.

2) Relevant Experience: Describe your agency's experience delivering the types of services proposed in this application.

The Road Home has served families experiencing homelessness or a risk of homelessness in Dane County, WI since 1999. As an agency, we seek long-term solutions to homelessness by helping families find and maintain stable, affordable housing. We work with families not only to relieve the immediate crisis of homelessness, but also to build skills, resources, and relationships that set the stage for long-term success. We provide a variety of types and levels of supportive services and stable housing programs that best fit families' needs and help them be successful. Over 95% of our families who could reach one year in stable housing do so.

2. ORGANIZATIONAL AND FISCAL MANAGEMENT (10 POINTS)

1) Quality Improvement: Describe your agency's internal quality improvement processes, including how you review program outcomes and incorporate feedback from program participants.

The Road Home Dane County (TRH) is committed to continual process assessment to maximize our services to families participating in our programs. Quality assessment and change management are led by the executive director in tandem with the program director.

The program director maintains careful oversight of all program activities, supported by two program managers, one each for the two main divisions of TRH programs (on-site housing support and scattered-site housing support). The body of TRH program staff act in close coordination in service delivery, ongoing training, and review of key metrics. The program managers run regular small team meetings; the program director facilitates regular full-program-team meetings. This close level of team communication and management creates a cohesive team environment where individual program staff continually upgrade their skills and knowledge – translating directly to direct client service.

An example of key metrics regularly reviewed is those captured in the Program Utilization report assessed by program leadership on a monthly basis. That report includes, at minimum, metrics on number of unique clients served, number of households served, bed utilization, and unit utilization. Through this regular reporting, each of these metrics may be assessed for each of TRH's 13 programs.

The program director and executive director also lead continual assessment of qualitative measures of overall program and staff effectiveness. This includes careful attention to staff morale and collaboration, staff knowledge and adherence to greater agency goals and professional workplace conduct, and a staff culture of information sharing and mutual support of client needs. Across the scale of the whole organization, program leadership strive to be attentive to the feedback housing advocate case managers report from their program participant clients.

Taking these measures, among others, into account, staff and program management participate in formal performance reviews and performance improvement processes. The first formal review for a housing advocate is conducted with the individual and program leadership after six months of the housing advocate's start with the organization. Past that, all organization staff participate in an annual formal review process, bolstered by informal reviews ongoing throughout the year.

The executive director and board of directors are responsible for the overall strategic direction of the organization. In 2025, the board of directors expects to form a new multi-year strategic plan for the organization, which will begin in 2026. Currently, the organization is operating with a "Strategic Scorecard" to provide key organization performance measures, including financial goals, program reach goals, and organizational culture and processes goals. This one-year plan is intended to uphold the organization's high level of service to its clients before a full multi-year strategic plan is formed. The upcoming strategic plan process is expected to prioritize flexibility, maintaining and growing TRH programs while also staying responsive to an uncertain operating and funding national nonprofit environment.

Beyond the organization itself, TRH strives to be a truly collaborative and communicative member of the many community partnerships that are the basis for the agency's programs. This includes being an active member, and even leader, among the organizations that make up the Homeless Services Consortium of Dane County. Working as a collaborative team in the greater community allows each participating organization to be responsive to changing community attitudes, funding, and the needs of the people our organizations proudly serve.

2) Financial Management: Describe how agency ensures sound financial accountability and sustainability.

The Road Home Dane County is dedicated to sound, professional financial practices at all levels of the organization.

Final financial and fiduciary responsibility rests with the agency's Board of Directors. They practice this responsibility through regular review of financial statements, oversight of and advisement to the agency's executive director, and the maintenance of financial policies following nonprofit best practices.

The board of directors includes a finance committee that meets regularly throughout the year. The committee serves to review reports provided by the agency's third-party accounting firm, Numbers 4 Nonprofits, to guide the overall financial decision-making of the organization, and to assess the performance of the executive director in both generating revenue and controlling expenses to facilitate efficient and sustainable program operations. The greater board of directors maintains policies relevant to financial management including an agency procurement policy and a conflict-of-interest policy signed by all board members.

The Road Home has contracted with reputable Madison-based accounting firm Numbers 4 Nonprofits for many years, engaging its services for bookkeeping, financial reporting and analysis, and strategy advisement. In addition to the above-referenced reporting to the board of directors, the accounting firm regularly provides financial reporting to the executive director and staff leadership team (program director, operations & HR director, development director). The agency also annually contracts a certified audit firm to perform an annual financial audit. For the last fiscal year – currently in the audit process as of writing – the agency has contracted RPB CPAs out of Milwaukee.

Internally, the agency staff maintains a system of segregation of financial duties, access, and approvals. This includes adherence to best practices, including having multiple mail-openers, separate entities authorized to write and to approve checks, and the use of locking files with unique keys for financial records.

3) Financial Audit:

The process of gathering and submitting referrals varies widely based on each program, especially in the programs that have partnerships with other service providers. For example, in our Heart Room program, receiving referrals from specific agencies (Rise Wisconsin, Children's Wisconsin, and Joining Forces for Families) after they have identified a family they are working with that would be an appropriate fit for the program. In this example, the nominations are then brought to the larger group for a vote. The family is either voted into the program, or it is determined that they would not be an appropriate fit, and they are denied. In Building Futures, referrals are taken from the Coordinated Entry priority list, reducing the need for referral coordination between the two agencies.

When our team engages in case conferencing as part of a larger group of community partners, we recognize that The Road Home plays a specific role in the family's care team. We share information about the specific goals that the family is working on with TRH staff, and how those goals may impact the goals that the family is working on with a partner agency. For example, in Building Futures, if a participant expresses a concern about the development of their young child, our team can record that information and pass it along to the family support specialist at Rise Wisconsin, who can conduct further assessments with the child. It's important to recognize each agency's scope of practice and adhere to it, avoiding complications between the service providers and ensuring the services being provided are adequate and supportive.

Some of our OPH programs have partnerships with agencies that provide specific services to families, thus supporting them with maintaining their housing. At Fair Oaks Apartments, we have a partnership with The Playing Field to provide families with high-quality childcare. This partnership eliminates the need for families who are dual-enrolled with both agencies to find other childcare or experience disruptions in their childcare schedule, allowing them to maintain employment or continue their education. At Housing & Hope Apartments, TRH partners with Job Shop, a collection of agencies including CommonWealth Development's workforce development program, Joining Forces for Families, and Children's Wisconsin. This partnership allows our team to make direct referrals to their services, eliminating the time that families wait to be connected with employment training programs and majorly reducing the risk for denial into those programs. Our goal is to continue identifying gaps in our services, and responding to those gaps by initiating new partnerships with providers in the community. The staff member in our Onsite Support position is tasked with helping to identify those gaps, connecting with other organizations or individuals in the community that can provide services directly related to those gaps, and then initiating those formal partnerships with the help of our program manager and program director.

- 2) Integration into the System of Care:** Describe strategies your agency uses to ensure alignment with the broader local system of care such as Homeless Services Consortium (HSC). Include strategies such as supporting staff or participants in system-level planning, participating in HSC committees or workgroups, providing staff training aligned with system priorities or best practices.

Each year, The Road Home crafts a document we refer to as our "Strategic Scorecard." This document details clear goals for each agency department, including goals designed specifically for program staff. In our Strategic Scorecard for 2024, our team set an expectation that all direct service staff (program coordinators, housing advocates, program managers, and the program director) join a committee through our Homeless Services Consortium (HSC). Staff were encouraged to choose a committee that either aligns with their role at the agency, or that is a special interest of theirs. Setting this expectation drastically increased our team's participation in HSC discussions and offerings, simultaneously increasing our team's knowledge about the broader systems that we engage with. Additionally, encouraging involvement in groups like this seemed to generalize with our team, and we saw more staff creating partnerships and connections with other agencies or committees in the community. For example, aside from our staff being more heavily

involved in HSC committees and meetings, some staff have since identified interests in joining the Sun Prairie Housing Committee meetings to offer insight and guidance as that team makes important decisions for housing programs.

Also a result of staff becoming more involved in HSC committees, we have seen more staff moving into leadership roles within those committees. Currently, we have staff in positions such as committee co-chair, lived experience, and secretary. We believe that having staff in those positions allows our agency to contribute in more impactful ways and help guide important decisions in our community.

Annually, our team conducts surveys with program participants to better understand their experiences in our programs. These surveys include questions that promote systems-level thinking with participants. For example, questions ask about gaps in the services TRH provides. In response to those questions, participants have provided insight into resources missing in the community as a whole (i.e., rental assistance, eviction prevention assistance, etc.). Learning this information from our program participants provides an opportunity for us to share this information with our broader community.

As we continue to make efforts to increase engagement in and understanding of our local Continuum of Care (CoC), we review the system performance measures and aim to understand how our outcomes compare to those achieved by peer groups in the community. As mentioned in the attached Other Permanent Housing program application, TRH has a dedicated goal to better track metrics that are identified as system performance measures. This includes assessing the percentage of families who return to homelessness after exiting our programs. We believe that by better understanding how our outcomes compare to the outcomes of our broader system, we will improve TRH program outcomes and efficiency. Our direct service providers review the system performance measures as a large group at least once annually, and they engage in discussions about how their services impact program outcomes. These touchpoints and intentional discussions provide an opportunity to assess our service provision and make necessary adjustments to remain aligned with best practices.

HOMELESS SERVICES & HOUSING RESOURCES

RFP #14026-2025

PROGRAM APPLICATION

H. OTHER PERMANENT HOUSING

Instructions:

This Program Application form must be completed for each proposed **Other Permanent Housing** program. Applicants may submit multiple program applications if applying for more than one program area under the RFP.

Please limit the total length of your completed Program Application – including the questions, tables and narrative responses, to no more than **12 pages**. Applications that exceed this limit may not be fully reviewed. This page limit does not include requirement attachments (e.g., HMIS reports, agency outcome reports).

Agency Name:	The Road Home Dane County
Program Name:	The Breese, Ace/DCHA, and Housing & Hope
CDD Funding Request:	\$112,224.00

1. PROGRAM DESCRIPTION (30 POINTS)

1) Program Location

List the addresses of the housing this program will support.

The Breese Apartments (1003 E Mifflin St, Madison, WI 53703)

The Ace Apartments (951 Acewood Blvd, Madison, WI 53714)

Housing & Hope Apartments (714 Vera Ct, Madison, WI 53704; 5808 Balsam Rd, Madison, WI 53711)

2) Target population

Describe the population you expect to serve, including:

- *Projected annual number of unduplicated households without children (singles): 0*
- *Projected annual number of unduplicated households with children (families): 47*
- *Key characteristics of the target population*

Each of the three programs relevant to this application involves pulling families from the Dane County Coordinated Entry list who are experiencing Category 1 homelessness in order to house them in TRH programs. Families at Housing and Hope must be chronically homeless, meaning the head of household has a disability, the family has a minor child in the household, and the family has been homeless for at least one year in the past three years. The Ace Apartments does not require families to

be chronically homeless at the time of entry, but requires disability for entry. Families are not required to have income upon entry to these programs, but TRH housing advocates (case managers) assist them in finding income to become self-sustaining in these situations. The Breese Apartments pulls larger families (families size 4 and above) experiencing homelessness from the Coordinated Entry list when there is a vacancy. Income is required to be placed at The Breese Apartments.

When working to place a family, our agency's program coordinator attempts to contact the family three times within one week of receiving the referral. If the family is interested in the program and qualifies, the coordinator works with the family to apply for housing following the documentation needs established by the program's relevant third-party property management firm (for example, Stone House Development in the case of The Breese Apartments. The review process takes, on average, two weeks to three months to complete. If the family cannot be reached, is not interested, or does not qualify, they are sent back to the Coordinated Entry list to be considered for other opportunities.

Families at all of TRH properties are more likely to have overlap with the justice system, mental health conditions, and are highly likely to be single-parent-headed households and families of color.

Families who are approved by property management begin paying rent after moving in and are assigned to TRH case management via a dedicated staff housing advocate. This process is designed to be as smooth and supportive for the participant as possible, with TRH staff facilitating move-ins and warm hand-offs while participants facilitate tasks such as moving belongings and choosing amenities. Families who are denied have a right to appeal while being placed back on the Coordinated Entry list.

3) Coordinated Entry and Intake Process

City-funded Rapid Rehousing programs providing rent or financial assistance must utilize the Dane CoC's Coordinated Entry system. This means informing the Coordinated Entry Manager (currently the Institute for Community Alliances) when there are program openings and accepting referrals from the Coordinated Entry list. Describe how your agency will receive and respond to Coordinated Entry referrals, and what the intake process will look like from the participant's perspective.

City-funded Rapid Rehousing programs providing rent or financial assistance must utilize the Dane CoC's Coordinated Entry system. This means informing the Coordinated Entry Manager (currently the Institute for Community Alliances) when there are program openings and accepting referrals from the Coordinated Entry list. Describe how your agency will receive and respond to Coordinated Entry referrals, and what the intake process will look like from the participant's perspective.

At all four properties listed, family referrals are taken from the Coordinated Entry priority list by one of our program coordinators when there is a confirmed program vacancy. Referrals are requested based on available bedrooms and household size, income limits, and other criteria specified by property management. The program coordinator works with families to gather the materials needed for the application and to assess programmatic fit based on eligibility criteria. If the family is approved, they are removed from the Coordinated Entry list and begin working with their assigned housing advocate. As long as they adhere to tenant expectations, they can remain housed in the unit until their youngest

child turns 18 years old, at which point they would then receive assistance to find other permanent housing.

From the participant's perspective, intake happens in several steps: signing the lease with an introduction to the housing advocate and property manager, completing the intake paperwork for the specific program, and beginning goal setting. The intake process is designed to be as smooth and logical as possible for clients across all programs, especially since clients are transitioning from homelessness to housing

4) Services Provided

Describe how the program will support participants in identifying and addressing specific barriers to obtaining and maintaining permanent housing, including housing navigation, connections to healthcare, behavioral health services, long-term case management, and other benefits. Include frequency and duration of services and how services will incorporate best or evidence-based practices.

The programs The Road Home seeks to fund through this grant include designated units in apartment complexes owned by third-party partner housing developers. Once families are selected from the Coordinated Entry priority list for one of our Other Permanent Housing (OPH) programs, they are screened for an apartment and either approved or denied.

Our partnerships with property management companies allow for the use of alternative screening criteria, which helps reduce the impact of families' barriers, such as past evictions or poor credit, on their housing eligibility. Collaborations with developers and property management companies, such as StoneHouse Development (SHD) at The Breese Apartments and Wisconsin Management Company (WIMCI) at The Ace Apartments, also eliminate the housing search process for families entering the program. This significantly reduces the amount of time a family spends experiencing literal homelessness after being selected.

This partnership model supports our agency's commitment to providing trauma-informed services by minimizing the stress and effort typically required during the housing search process. It also ensures alignment between our mission and the property management companies that work with our families. The Road Home is eager to build additional partnerships with local developers to expand successful housing programs for families experiencing homelessness. However, developers have recently indicated that their budgets do not allow them to fund supportive services adequately. To confidently enter into more partnerships, we recognize the need to identify other funding sources to cover the cost of the supportive services we currently provide.

Once a family is accepted into one of our housing programs and moves into a unit, they begin working with a Housing Advocate (also known as a case manager) to pursue self-identified goals related to housing stability, employment, children's well-being, education, and mental and physical health. Our collaborations with other agencies and community partners allow us to provide wraparound services that address a wide range of family needs.

We have a partnership with Sankofa Behavioral & Community Health (formerly known to us as Day One Mental Health), which allows The Road Home to cover the cost of mental health services for families who are uninsured, underinsured, or otherwise unable to afford care. We also work with childcare centers, employment training programs, and local school social workers to support families holistically. Additionally, two of our staff members working in different OPH programs are certified in the SOAR program, and can assist eligible families in applying for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI).

Our staff use a person-centered and guided approach when providing case management services and setting housing stability goals with families, as to ensure that the goals are relevant and achievable. The role of the Housing Advocate is to support the families with maintaining permanent housing while they are enrolled in the program. Some ways that our Housing Advocates support families with this goal may include: engaging in housing consultations where the conversation centers around the families' abilities to pay their rent or utilities, encouraging families to create and follow through on payment arrangements when they owe past due rent or other fees, explaining and educating families on the guidelines of their lease, supporting mediation between property managers and families, addressing housekeeping concerns and offering appropriate solutions, and teaching basic budgeting skills.

Our OPH programs follow the Progressive Engagement model of case management when providing services to families. This means that our staff are trained to recognize the level of support needed and adjust accordingly, offering more support when warranted, and encouraging more autonomy when able. Our agency standard strongly encourages families to meet with their Housing Advocate for a minimum of one in-person visit in their home each month, however, we encourage more conversations with families when additional support is justified. On average, Housing Advocates working in our OPH programs are connecting with families once per week via phone/email, and having in-person meetings with them biweekly.

5) Staff Training

Describe your agency's plan for staff training. Include both new staff and ongoing training plans.

At The Road Home Dane County, we are committed to hiring qualified individuals and providing a consistent, comprehensive onboarding experience for all new staff. Orientation is designed to clearly communicate agency policies and expectations while preparing employees for success in their roles. New team members gain a strong understanding of what they can expect from the organization and what is expected of them. The process also includes an introduction to our history, mission, vision, and organizational structure. To promote collaboration and cross-departmental understanding, new staff meet with department leaders to learn about each area's role and contributions. We believe strong internal relationships are essential to the success of our work.

The program staff at The Road Home bring a strong foundation of experience and education, including degrees in social work or related fields, direct work with individuals experiencing homelessness, and in some cases, lived experience. They are highly skilled in engaging diverse populations, assessing family strengths and barriers, and identifying appropriate housing and service needs. Staff maintain deep knowledge of community resources and foster strong partnerships with other service providers to

ensure families receive comprehensive support in achieving housing stability, employment, and other self-identified goals, both during and after program participation. The program team also upholds rigorous standards for documentation, reporting, and confidentiality to protect and empower the families they serve.

The first training new program staff complete upon hire is in the community's Homeless Management Information System (HMIS), which is used to document family-related data. Additional required external trainings for program staff include the following:

To ensure staff remain current on best practices, policies, and procedures, program staff are required to retake many key trainings throughout their employment. Program coordinators also complete advanced HMIS training to manage unit placements effectively. In addition, two staff members working in separate OPH programs, are certified in SOAR (SSI/SSDI Outreach, Access, and Recovery). They are equipped to assist eligible families in applying for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI), and can also support other staff in guiding the families they serve through the application process.

- Mandated Reporting
- CPR Certification
- Narcan Administration
- Equity and Anti-Racism
- Cultural Competence & Diversity
- Boundaries and Ethics
- Trauma-Informed Care
- Tenant and Landlord Law
- Homeless Services Consortium
- Mental Health and Substance Use

To ensure staff remain current on best practices, policies, and procedures, program staff are required to retake many key trainings throughout their employment. Program coordinators also complete advanced HMIS training to manage unit placements effectively. In addition, two staff members working in separate OPH programs, are certified in SOAR (SSI/SSDI Outreach, Access, and Recovery). They are equipped to assist eligible families in applying for Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI), and can also support other staff in guiding the families they serve through the application process.

6) Staffing Structure

Describe the proposed staffing plan. Fill out the table below.

Staff Position Title	Hiring Plan (Current/ New/ Expanded)	Total Program FTE	City-Funded FTE	Proposed Hourly Wage	Responsibilities
Housing Advocate (Breese)	C	0.70	0.50	\$ 24.12	Provide case management services at The Breese Apartments
Housing Advocate (Ace)	C	0.33	0.33	\$ 25.22	Provide case management services at The Breese, Housing & Hope, and The Ace

Housing Advocate (Onsite Support)	C	0.65	0.65	\$ 26.92	Provides case management services to all OPH programs
Program Coordinator	C	0.00	0.00	N/A	This position will not be funded by this grant.
Program Manager	C	0.00	0.00	N/A	This position will not be funded by this grant.
Program Director	C	0.00	0.00	N/A	This position will not be funded by this grant.
Executive Director	C	0.00	0.00	N/A	This position will not be funded by this grant.

7) Implementation Plan (for new or expanded programs only)

Milestone	Target Date
Program staff hired	N/A
Program staff onboarding/training completed	N/A
First client served	N/A
Full-service operation capacity reached	N/A

2. OUTCOME AND PERFORMANCE (20 POINTS)

Select one and complete the appropriate section below:

- ☒ A. Existing Program with HMIS Data
☐ B. Existing Program without HMIS Data
☐ C. New Program With No Past Outcome Data

A. Existing Program with HMIS Data

*Use HMIS-reported data for past outcome fields. Refer to RFP **Appendix C** for instructions on generating the required reports. The HMIS report must be submitted with your application.*

1) Data Standards

The Wisconsin HMIS data quality standards for Other Permanent Housing require: 98% for data completeness and 6 calendar days for data entry.

Please complete the following:

- 2024 data completeness score: 97.92%
- 2024 average days to data entry for new entries: 12.3 days
- 2024 average days to data entry for exits: 37.5 days

Describe your agency's current practices to meet these standards and any planned improvements.

When a family enters into a TRH Other Permanent Supportive (OPH) housing program, their dedicated housing advocate meets with them to complete various enrollment paperwork and tasks, including getting them enrolled into HMIS. Our staff are expected to enter data into HMIS within one week of the

family being entered into a housing program. Housing advocates are trained to have supportive conversations with families regarding the information that is requested for HMIS, as to reduce hesitations related to sharing their information.

The program manager overseeing the OPH programs is responsible for conducting quarterly data checks in HMIS as a way to correct any errors. When conducting audits of HMIS data, the program manager will communicate the corrections needed to the housing advocate, who will then work with the family to update the necessary information. Although there are many reasons for data entry errors in HMIS, oftentimes these errors are a result of information that was not initially captured, so these checks serve as a reminder to request accurate information from the family.

We intend to continue improving our oversight of HMIS data by training staff to run reports for their programs and complete self-audits of their own data. By encouraging direct service staff to have more oversight of their program's data, we believe they will feel more empowered to make corrections more frequently and that they will have a better understanding of the importance of accurate data entry practices.

2) Use of Data for Performance Improvement

Describe how your agency uses data to evaluate and improve outcomes. Include the key data points or reports that are reviewed, who reviews them, and how the data are used to inform program changes.

All staff working within our housing programs are responsible for maintaining up-to-date data in HMIS, as well as in our internal tracking systems. While we prioritize data accuracy in HMIS, we also utilize spreadsheets, case notes, and other internal systems for additional data storage and analysis.

Direct service staff, including housing advocates, program coordinators, and onsite support staff, are responsible for gathering information from families and promptly entering it into HMIS. Program managers conduct periodic spot checks to review the accuracy of data in both HMIS and our internal systems. Additionally, our program director conducts quarterly data quality checks in HMIS. When corrections are needed, the Program Director collaborates with the relevant Program Manager and direct service staff to ensure updates are completed accurately. When trends are identified in the data, the program leadership team (consisting of the program managers, program director, and executive director) consider new strategies to implement or changes that can be made to the program in order to achieve better results.

Annually, our agency compiles program outcome data using HMIS reports and information gathered from direct service meetings with families. These annual statistics assess program outcomes such as: the number of families that remain stably housed, the number of families that were employed, the number of families that increased income, the number of families that received eviction prevention assistance, and the number of families that exit to stable housing.

To monitor program utilization, program managers run monthly Housing Inventory Count (HIC) reports in HMIS. These reports help staff assess each program's capacity and ensure units are being used efficiently. Managers work closely with program coordinators to address any gaps in utilization. Last

year, when we noticed that programs were not being fully utilized, we began having intentional monthly discussions regarding unit utilization. In addition to those discussions, the program leadership team added a goal of increasing unit utilization across all programs to our Strategic Scorecard (a tool that we use to display the vision and goals of our agency annually). We reviewed this goal quarterly as a leadership team, and twice per year with the entire program team (including housing advocates and program coordinators). After implementing these intentional discussions about utilization and identifying a goal to improve unit utilization, we saw a decrease in the number of vacant spots in each program.

Our Program Director also uses a variety of HMIS reports to assess data quality and family outcomes. The Program Outcome Measures report is used to track exit destinations for families leaving our programs, with the goal of reducing returns to homelessness or exits to unknown destinations. The Annual Performance Report (APR) is reviewed to assess data completeness and trends related to income, health insurance, disability status, and household demographics. When trends emerge, the Program Director follows up with relevant staff to determine whether programmatic changes are needed. When reviewing these reports recently, it was noted that we have a larger percentage of program participants identifying as having a mental health disorder than the percentage of participants receiving mental health services. This realization drove the decision for The Road Home to accept an intern from Public Health who is completing a project on the topic of connecting individuals experiencing homelessness with mental health services. This realization also sparked discussions between The Road Home and our partners at Sankofa Behavioral & Community Health (formerly known to us as Day One Mental Health) to expand our partnership and offer services to even more individuals in our programs.

For example, it was noticed previously that many families were refusing to share their Social Security Numbers (SSNs) with direct service providers, due to uncertainties about how that information is documented. Upon reaching out to the housing advocates to ask that they have discussions with their families to get this information, we became aware that not all staff fully understood how information is protected and used in HMIS. The program director and program managers provided additional context and coaching for direct service staff, which empowered them to have those conversations with families. Also following this realization, a housing advocate elected to create a document that broadly explains confidentiality in social services; including how information is stored and protected at our agency, and what situations may warrant our staff breaking confidentiality to keep individuals safe. As staff became better equipped to explain confidentiality and privacy protocols, we saw a notable decrease in missing or incomplete SSNs.

To ensure that every family we are serving is entered into HMIS, we encourage housing advocates to run a Program Roster report. This report provides them with a list of families that are currently enrolled in their respective programs in HMIS, allowing them to identify any that may have been missed.

Three staff at our agency hold “looker licenses” in HMIS, allowing them to run specialized reports to gain a deeper understanding of program outcomes and trends. One report they run with that license is called “Change in Income (NOT SPM)”, and this allows them to better understand the number of families in each program that increase their income or lose income altogether. Knowing this information empowers

our team to work with families to increase their income through traditional employment, apply for necessary benefits such as SSI/SSDI, or get enrolled in employment training programs.

Earlier this month, our program director and one of our program managers attended a training on HMIS oversight and reports. In that training, they learned about the “EHH for Data Quality” report and its utility in evaluating program performance. Since that training, our team has begun using this report across several programs and plans to incorporate it regularly into our data review process.

3) Performance Outcomes

Performance Measure	CDD Target	2022 Outcome	2023 Outcome	2024 Outcome	Proposed Outcome
% of Participants Who Retained or Exited to PH	90%	98%	87%	89%	92%
% of Leavers Who Exited to PH Returning to Homelessness in Less than 6 Month	≤ 5%	0%	0%	0%	0%
Unit Utilization Rate	95%	90%	90%	87%	95%

In order to calculate the percentage of participants who retained or exited to permanent housing, an Annual Performance Report (APR) was run. This report indicates the total number of families that exited the housing programs and where they exited to, as well as the number of families that remained in their housing. We combined the number of families that exited to permanent housing and the number of families that remained in permanent housing, and divided that by the total number of families served. For example, in 2022 TRH served a total of 52 families across the three program relevant to this application. The total number of families that stayed in the programs (thus maintaining permanent housing) was 39, and the total number of families that exited to permanent housing was 12 – a total of 51 families. We divided 51 by 52 to get the percentage to include here. APRs for 2022, 2023, and 2024 are attached for your reference.

4) Outcome Analysis

Compare your agency’s past performance to CDD targets. Discuss trends and what you think explains your successes or challenges. What changes/strategies do you think could help improve outcomes?

The CDD target for percentage of participants who retained or exited to PH is 90%. The three programs relevant to this application exceeded that metric in 2022 and were within 3% of that metric in 2023 and 2024. The requested funding will allow TRH to continue improving our case management services across all three programs. The onsite support staff position is new to our agency as of 2024. We recognized

previously that our permanent housing sites would benefit from additional support for families, and we have molded this position to closely fit the needs of our families. For example, we recognize that increasing income is vital to the success of a family in permanent housing, so our onsite support staff role is responsible for connecting families to various employment resources and training programs, where appropriate. We plan to continue developing that role as the needs of our families evolve.

The CDD target for percentage of leavers who exited to permanent housing and returned to homelessness in less than six months is five percent or fewer. The three programs relevant to this application all had zero families who met this criteria in 2022–2024. When families exit our OPH programs and enter into another permanent housing option, we do not see them returning to homelessness within six months. We believe that our Progressive Engagement model of case management promotes self-sufficiency and autonomy in the families we serve, helping them learn to address situations with less support over time. This approach helps families maintain stability and increase autonomy as the program continues. When families exit these programs, they've had practice communicating with their property manager, being a responsible tenant, and managing their finances. Additionally, our partnerships with property management companies encourage more positive landlord references once a family leaves one of our OPH programs, thus supporting the family with securing other permanent housing.

When comparing TRH unit utilization outcomes to the CDD targets, TRH programs have slightly lower utilization rates than CDD targets. At The Breese Apartments specifically, our team has been in conversations with staff from The City of Madison, Stone House Development, Wisconsin Management Company, and ICA/Coordinated Entry to better understand why we receive more referral denials there than in other programs. We believe this is in part due to the strict guidelines of Section 42 properties, specifically related to income requirements. Oftentimes, families referred to The Breese Apartments appear to have adequate income, but upon submission of their application and verification of income, it turns out that they either make too much or too little income to be considered for the program, resulting in a denial. The TRH program coordinator who fills units at these sites has modified their approach to help mitigate this risk (i.e., by verifying pay using pay stubs prior to submitting applications, having more intentional conversations with property managers that screen applications before submitting one, etc.).

5) Additional Outcome Measures

List any additional outcomes your agency tracks or proposes to measure.

Within our internal annual statistics process, our team is interested in expanding the metrics we assess to include ones that align more closely with our Continuum of Care's System Performance Measures. Specifically, we aim to begin tracking returns to homelessness using various HMIS reports, including the EHH Report for Data Quality. Assessing this metric will help us better understand the longer-term sustainability of families exiting our housing programs, which can help guide future decisions for our programming.

Our team plans to uphold our current data review practices, which will allow us to continue assessing the metrics currently covered in our quarterly data checks in HMIS and our annual statistics process.

3. PROGRAM BUDGET (20 POINTS)

1) Leveraging Medicaid Resources

Describe how your agency will utilize Medicaid 1915(i) and/or Comprehensive Community Services (CCS) to support the proposed program. Include:

- Specific services or costs for which you expect to seek Medicaid 1915(i) or CCS funding
- A realistic estimate of revenue you expect these sources to generate
- Steps, if any, your agency has already taken to access these funding sources and/or a timeline for securing necessary certifications and training
- Any preparation or infrastructure you think your agency will need to support billing and compliance

Note: City-funded emergency shelters and outreach programs selected through this RFP will be required to utilize Medicaid 1915(i) to support eligible services and/or move-in cost assistance. Other program types are not required but are strongly encouraged to incorporate Medicaid funding strategies where feasible.

We anticipate that 5 case managers will each provide approximately 10 hours per week of billable service time under 1915(i), totaling 50 billable hours per week.

Client Volume: We estimate that approximately 50% of our active clients (about 45 individuals) will be eligible and enrolled for 1915(i) services.

Projected Revenue from Housing Stabilization (Sustaining Services): \$146,224 annually

The current Medicaid reimbursement rate for Housing Sustaining Services is \$14.06 per 15 minutes of service (or \$56.24 per hour).

Assuming 50 hours of billable service per week:

50 hours/week × \$56.24/hour = \$2,812 per week

Annually: \$2,812 × 52 weeks = approximately \$146,224 per year

Projected Revenue from Housing Consultation Services: approx. \$150,000 annually

The rate for Housing Consultation is \$84.36 per consultation, based on 1.5 hours per client.

Assuming 45 clients each receiving 1 consultation per year:

45 clients × \$84.36 = \$3,796 annually

Total Annual Projected Revenue:

Approx. \$150,000 annually (combined from Sustaining Services and Consultation), assuming full implementation and enrollment.

Steps Taken and Timeline for Certification:

TRH has initiated conversations with our regional 1915(i) lead and are gathering information on provider certification requirements. Our projected next steps include:

- July 2025: Finalize staff training schedule and begin policy and documentation development for Medicaid-compliant service delivery.
- August 2025: Submit provider enrollment applications and complete necessary staff training.

- September 2025: Begin service delivery and billing for eligible services.

Preparation and Infrastructure Needed:

To successfully implement 1915(i) billing, our agency will need to:

- Develop internal written standards for service delivery
- Update and align our electronic health records (EHR) system for Medicaid documentation and claims tracking
- Provide targeted staff training on Medicaid billing, service documentation, and compliance standards
- Designate a billing and compliance coordinator to oversee the process and ensure we meet all regulatory requirements
- We are confident that with these steps, our agency will be fully prepared to leverage 1915(i) funding to sustainably support housing stability for our clients.

2) Program Budget Form

*Complete the **Program Budget Form (Excel)** for a full program year. Only expenses listed as eligible in Appendix B of the RFP may be included in the funding request to the City of Madison.*

3) Budget Narrative and Clarifications

Use this section to explain any assumptions, nuances or clarifications needed to fully understand your budget proposal as presented in the Program Budget Form (Excel).

The funds requested in this application will support the vital housing advocate staff positions at the heart of the TRH programs at The Breese Apartments, The Ace Apartments, and our Housing & Hope locations. The requested amount of \$112,224.00 will provide significant partial coverage of salary/benefit packages for three positions. This request reflects partial salary/benefit package amounts to accurately reflect 1) the allotted time each housing advocate spends toward each relevant program among their total TRH staff duties 2) only salary/benefit expenses that are not covered by any other restricted funding source outside of the City.

AGENCY, PROGRAM AND CITY SHARE EXPENSES

Agency & Program:

The Road Home Dane County; Housing & Hope Apartments; The Breese Apartments; The Ace Apartments

ACCOUNT CATEGORY	City of Madison Request Amount	Non-City Sources	Total Program Budget	Budget Details W-9: Case manager and supervisor wages; \$1,000 for application fee; \$3,000 for bus passes)
A. PERSONNEL				
Salary	76,402	12,400	88,802	Portion of salaries for three TRH staff positions; see table at Q3 for proportions.
Taxes/Benefits	35,822	0	35,822	Portion of benefits for three TRH staff positions; see table at Q3 for proportions.
Subtotal A.	112,224	12,400	124,624	
B. OTHER OPERATING				
Insurance	0	0	0	
Professional Fees	0	0	0	
Audit	0	0	0	
Postage/Office and Program Supplies	0	0	0	
Equipment/Furniture/Depreciation	0	0	0	
Telephone	0	0	0	
Training/Conferences	0	0	0	
Food	0	0	0	
Household Supplies	0	0	0	
Auto Allowance/Travel	0	0	0	
Vehicle Costs/Depreciation	0	0	0	
Other (Specify):	0	0	0	
Subtotal B.	0	0	0	
C. SPACE				
Office or Facility Rent	0	0	0	
Utilities	0	0	0	
Maintenance	0	0	0	
Mortgage Principal/Interest/Depreciation	0	0	0	
Property Taxes	0	0	0	
Subtotal C.	0	0	0	
D. SPECIAL COSTS				
Assistance to Individuals - Rent (monthly rent and rent arrears)	0	0	0	
Assistance to Individuals - Other Financial Assistance (security deposit, application fee, bus passes, etc.)	0	0	0	
Program Subcontracts (Specify):	0	0	0	
Other (Specify):	0	0	0	
Subtotal D.	0	0	0	
TOTAL (A-D)	112,224	12,400	124,624	

NOTES: The "non-city source" reflected in cell C6 is partial salary coverage of the TRH housing advocate at The Breese Apartments, contributed by Stone House Development, the property
manager partner for that program.

STAFFING: Include ALL staff working for the program		
Staff Position Title	City-Funded FTE	Total FTE, including Non- City Sources
Housing Advocate (Breese)	0.50	0.70
Housing Advocate (Ace)	0.33	0.33
Housing Advocate (Credit Support)	0.65	0.65
Program Coordinator	0.00	0.00
Program Manager	0.00	0.00
Program Director	0.00	0.00
Executive Director	0.00	0.00