To: Gatekeepers
From: Homeless Services Section Staff
Date: 9/13/2022

Please distribute to: ⧫Executive Directors ⧫Homeless Services Program Staff
⧫Rental Assistance Program Staff

Category: Program Informational

Update For: 23-25 IR Network Engagement Questions and Answers

Message: Thank you to all who participated in the IR Network Engagement session for the upcoming biennial changes in the HSS IR process and for those who participated in the beta testing of the actual IRs. Your input, suggestions and comments will make this a better process for the next biennium and we appreciate you!

Attached is a summarization of all the questions we received and OHCS’ responses. If you have any additional thoughts or concerns, please contact HSS Program Staff. Again, thank you and have a safe and happy holiday.

(see next pages for the Q&A document)
**Q & A on 23-25 IR Network Feedback**

**Generally:** Technical issues or performance flow suggestions that were identified during the test phase were addressed and implemented.

**Q1:** Is there a way to at least remove PD vs FA within each category?

**A1:** As OHCS moves to a more streamlined IR process, very little information will be collected at the beginning of the biennium that will give an indication of how agencies plan to expend funds. It is critical that OHCS receive as much information that can be made available while responding to the network’s request for the least burdensome IR process as possible. Having the Program Delivery category is a specific response to repeated legislative requests to provide information on the amount of funds needed for the delivery of OHCS programs. Being able to separate the amount of funds expended on clients and the amount of funds expended on getting those dollars out the door is critical in answering that legislative request and in telling the story of the costs associated with addressing the homeless crisis.

**Q2:** Can a list of all the questions be provided in a Word (or similar document) in addition to Smartsheet, including conditional logic? Ability to save progress as you move throughout the form.

**A2:** Yes, this will be made available to help agencies appropriately plan for the length of time it will take to complete the IR. While not being able to save existing work is a limitation of Smartsheets, separate modules will allow for the completion of one IR at a time rather than all the programs at once and having the Word/PDF document of the all the questions in advance will help mitigate this issue.

**Q3:** When multiple responses can be selected, can it be specified in the question?

**A3:** Yes, this help text will be included.

**Q4:** Can you say more regarding the reasons the state is committed to Smartsheet? vs. Excel or another form that calculates total budget? Entering budgets and not being able to “test” for accuracy is antiquated. Additional comment was to show sums of budget information for ability to double check.

**A4:** While Smartsheet does have some limitations, it provides a simple way for OHCS to gather all information together in a single place and allows information that is gathered from dozens of IRs to be distilled in a simple way for analysis. It will be incumbent upon agencies to double check their work either by hand or with a calculator before they submit the IRs to ensure they have the correct budget amounts, or the IR will be returned for correction. Please also note that OHCS is actively looking at grant management software solutions for all OHCS programs that will have better functionality and more capabilities, such as formulas, to help guide agencies in budget submissions.

**Q5:** In the example IR shown, is the file upload section the location we will drop the required docs/policies? If so, can those be listed in the smart sheet by grant?

**A5:** Several grants have required documents that will be able to be uploaded in that grant’s IR; however, many required documents are general, not specific to a single program, so those documents will have their own IR in which you will upload those specific documents. It is important to recognize that another limitation of Smartsheets is file upload limitations. The
system will only accept 10 uploaded documents so you may need to combine several documents into a single file before submitting so that you fall under the 10-document limit. It is also important to ensure that documents are not drafts and that they are submitted as pdfs – this will facilitate the combining of documents together, if needed and mitigate the limitation.

**Q6:** Could the signature not be the ED and instead the person submitting? Ability to route internally for signature.

**A6:** Yes, OHCS has removed the requirement for the ED’s signature. Only the submitter will now need to electronically sign their submission. The ED’s signature on the MGA is sufficient.

**Q7:** Can the system have the ability to print/save IR responses submitted? Currently gets saved in personal emails. Employee leaves/history is lost.

**A7:** Unfortunately, Smartsheets does not create a pdf document and will send communication to the submitter via email. OHCS will add an additional email option in which agencies can identify a specific email that they would prefer to have these responses sent. It is incumbent upon the agencies to appropriately store their approved IRs in a manner that is accessible. OHCS has also reduced the length of IRs, so hopefully that will help mitigate the issue with multiple pages. Agencies also have the option to have their initial responses automatically sent to them, via email, by clicking the box at the end of the form titled “Send me a copy of my responses” and entering any email they choose.

**Q8:** All things HSP are very outdated. Need to update and right size reporting/administration to the size of the project. Most hated project internally and externally. Have had to convince subs to keep operating the project. HSP is very “old school” and needs to be updated to right size the requirements. Needs to be much more flexible.

**A8:** As HSP is funded with TANF dollars, the program is tied to the federal regulations associated with TANF. OHCS does not have the ability to waive federal requirements; however, we have worked diligently on making the program as simple as possible. Additional training will be available before the next biennium to assist in training new staff in CAAs. It is important to recognize that requirements only apply for as long as the agency has HSP funds to expend. All agencies have the option of spending their funds quickly, whether they receive a large or a small grant, in the first couple of quarters of the year and alleviate the burden of continued requirements throughout the rest of the year. Additionally, by adhering to the priority population requirement, agencies can target funds for those in which they have received referrals, which alleviates much of the documentation burden and allows for sharing of assessments and case plans with ODHS. Also, HSP has some of the most flexibility in allowable costs than any other program. Please feel free to share any streamlining thoughts you may have regarding HSP with Sheila.parkins@hcs.oregon.gov. We are happy to look at ways in which HSP can be more user friendly.

**Q9:** Include staff number with email.

**A9:** OHCS is unsure as to what staff is being addressed in this comment; however, including the CAA phone number and email is a part of the IR and OHCS staff contact information can be found
Q & A on 23-25 IR Network Feedback

on the HSS dashboard under the Helpful Links section at:
https://app.smartsheet.com/b/publish?EQBCT=8a215621578a4f76ae98113d719d5e64

Q10: Why enter admin? Can’t that be a dropdown selection based on form logic and tied to the allocation chart?

A10: While OHCS could automate this function, many agencies do not take the full amount of admin funds allocated to them. This would create issues in their budgets where they would not be able to increase their program allocation by the amount of funds in which they decreased their admin allocation and remain within their total allocation. OHCS must be responsive to many different needs by different subgrantees.

Q11: HTBA – only rent assistance is in the budget; need to have other allowable categories.

A11: HTBA only has a single program category. Clarity in what can be funded through that category will be provided in the operations manual.

Q12: How can we forward our data entries on the Smartsheet to another person in our agency for final approval?

A12: Receiving CAAs will need to create their own internal processes for approval as that is not something that OHCS will dictate; however, OHCS will look at ways to ensure that multiple people can be notified of OHCS approval/need-for-more-information emails.

Q13: I thought the demo would show a bit more of what will be expected to fill in the cells. It seems that most of the Smartsheets has the same information. Is it really that simplified? I didn’t see where we will need to enter budgets for the fund streams. Did I miss we are doing that a different way?

A13: Yes, the process is very simplified. Some modules will include some additional fields that others will have for requirements; however, they have been extremely simplified. Unsure why a budget was not available to this respondent as all funding stream modules have a budget component. There were several modules that do not include a budget as they are general, such as the required documents and subrecipient modules. Subrecipient budgets will be submitted with the year-end report.

Q14: In CSBG, FNPI#/SRV is not defined. Additionally, it looks like you are almost done and then another section of questions appears. Please display all questions at once so we can better estimate how much time completion will take.

A14: Modules include conditional logic in which additional questions will appear depending on a CAA’s response; however, per Q2, a list of all questions will be provided to agencies in advance of the release of the final IRs to help plan for adequate time management. Additionally, due to limitation of Smartsheet, there was some difficulty in creating a usable link for the list of FNPI/SRV’s; however, OHCS is working on a solution for this issue.

Q15: Will this just be for Homeless fund streams? How will the process roll out for Energy Assistance and Weatherization funds? Will it change from 21-23?
Q & A on 23-25 IR Network Feedback

A15: The use of Smartsheets and this simplified process is only addressing Homeless funding streams and does not reflect Energy or Weatherization programs. More information from the Energy/Weatherization unit will be shared with the network as it becomes available.

Q16: Is it necessary to have a separate area for target population for all the subrecipients? Can’t this be addressed when we describe the scope/services?

A16: OHCS wants to keep this as a separate field; however, OHCS will ensure that additional help text is included that states “You are not required to have a target population. If this doesn't apply, please enter "N/A", to clarify and streamline your response. Also, the manuals clarify that a target population is not just referring to the eligibility criteria inherent in the program’s requirements, so this may reduce some of the responses.

Q17: Can CSBG be simplified? It seems longer than the questions for 21-23 biennium application.

A17: Due to the switch between SMA and Smartsheets, CSBG may appear longer or more complex; however, the questions are essentially the same. CSBG will not be reduced more than what is currently identified.

Q18: Is the question on follow up in the primary referral org for CSBG referring to a 6 month follow up?

A18: Yes.

Q19: CSBG Linkages sheet: Provide the requested information describing the anti-poverty programs offered by the agency. Anti-Poverty Program #1. Is the question to the Subgrantee’s programs?

A19: Yes.

Q20: For the time period of annual expenditure, enter a whole number to identify the percentage of funds that will be expended by May 31st? Should this say June 30? Especially if we are expected to insert 100% in Q4?

A20: The Time-Bound Expenditure period is based on the fiscal policy that identifies May 31st for the percentage of Q4. The standard percentage is 90% and there is an expectation that at least 90% of funds will be expended by May 31st; however, if the CAA is entering a variation to the standard, there is not an expectation that this percentage be 100%, unless that is what the CAA wishes to identify.

Q21: HSP questions need reviewed. Are you giving us items you look for in the evaluation of our responses?

A21: OHCS is unclear as to what this question is addressing; however, if this is in reference to the Collaboration Plan – a template will be provided which must be completed and the responses to those questions will be reviewed by OHCS to ensure that each point is sufficiently addressed. Standards are written into the manual on some aspects of these questions; however, this is an agreement between the CAA and the local ODHS District, so agreement between those two organizations will be the main consideration for evaluation. If this is in reference to the MOE questions, then there is quite a bit of help text on the questions to guide the responses; however, additional assistance, if needed, will be available to CAAs to ensure that the responses meet the
requirements and can be used to complete the quarterly certification that is required when using in-kind MOE sources. Additionally, before the IR becomes “live”, OHCS will provide an additional mandatory training on HSP for the new biennium that will cover the IR, along with any other programmatic standards, expectations and changes.