

**PROTOCOL**  
**2018 MONTANA POINT-IN-TIME HOMELESS SURVEY**  
**and**  
**HOUSING INVENTORY**

**INTRODUCTION**

The Montana Point-in-Time (PIT) Survey and the Housing Inventory (HI) are part of a nationally coordinated and simultaneous effort to identify the number of persons homeless and the number of beds dedicated to homeless persons on a single night during the last week in January.

The MT Continuum of Care Coalition (MT CoC) is required to submit the PIT and HI data into a national data base. The quality of the data is reviewed by HUD and this becomes one of the scored elements in a CoC's application for competitive grant funds. At least \$2.4 million in grants to 18 Montana projects depend on the MT CoC successfully implementing the HI and PIT and submitting quality data.

It is important that all survey efforts follow this protocol in order to provide reliable and consistent data across the nation as well as over time in Montana. This protocol reflects and summarizes HUD requirements contained in HUD Notice CPD-14-014-Housing Inventory Count and Point-in-Time Data Collection and the HUD Point-in-Time Methodology Guide.

The 2018 PIT and HI will occur on the evening of Thursday, January 25<sup>th</sup>. The "point-in-time" is defined as sunset beginning on the 25<sup>th</sup> and ending at sunrise on January 26<sup>th</sup>. There is one exception allowed for "Service-Site Counts," which is addressed below under the Unsheltered Count section.

**I. ANNUAL HOUSING INVENTORY:**

To conduct a successful homeless survey it is first necessary to inventory all of the beds that are dedicated to and used by homeless persons. A project with a dedicated bed is one where:

- A. The primary intent of the project is to serve homeless persons,
- B. The project verifies homeless status as part of its client intake or eligibility determination, and
- C. The actual project clients are predominantly homeless (or, for permanent housing, were homeless at entry).

In Montana, these beds fall into one of the following categories:

1. Emergency Shelters (ES) and Domestic Violence Shelters (DVS),
2. Transitional Housing (TH) facilities,
3. Motel vouchers provided by a church, Salvation Army, HRDC or others,
4. Permanent Supportive Housing provided by HUD-CoC PSH vouchers or Veterans Administration VASH vouchers,
5. Rapid Rehousing (RRH), including CoC and Emergency Solutions Grant programs.

The MT CoC maintains the Housing Inventory and distributed the 2017 Inventory to all local PIT coordinators in late December for their review. It is important that a local review identify any new or missing facilities or programs that the MT CoC should add to the 2018 Inventory. Local PIT Coordinator review and updates should be completed by January 5<sup>th</sup>. To request the list or for any additional information on the Inventory, contact Greg Owens at [thegregowens@gmail.com](mailto:thegregowens@gmail.com) or [mtcoc.coalition@gmail.com](mailto:mtcoc.coalition@gmail.com).

**II. ANNUAL POINT-IN-TIME HOMELESS SURVEY**

There are essentially two separate survey efforts:

1. Unsheltered count.
  - a. Includes the service sites count which is only meant to count unsheltered homeless missed on the night of the count.
2. Sheltered count.

The Unsheltered or “street count” is overseen and implemented by local PIT Coordinators. The Sheltered count is overseen and implemented by the MT CoC Coalition.

Follow the Protocol: It is essential that all survey efforts closely follow this protocol to ensure that uniform and consistent data is collected.

Homeless Definitions: The Montana PIT Survey is required to collect and report data using the HUD definition of homeless. In short, this is persons sleeping in a place not meant for habitation or persons living in emergency shelters and transitional housing projects. It does not include persons who are doubled-up, couch surfing or persons in jails, correctional facilities, foster care, hospital beds or treatment or detox centers. Other federal agency definitions of homeless can include, for example, persons who are doubled up or couch surfing.

The Montana survey is designed so that volunteers and interviewers do not need to screen for various definitions of homelessness. A single survey questionnaire is used in all situations and a data management system allows data to be screened and retrieved according to the user’s needs. In short, the guidance to all volunteers is this: ***Anyone suspected of being homeless or anyone who thinks they are homeless should be surveyed.***

Confidentiality Agreement:

It is necessary that anyone handling completed surveys sign a Confidentiality Agreement to safeguard the personal information of persons answering the survey. The Agreement states that the volunteer agrees to: 1) keep all information confidential, 2) protect all surveys by keeping them from public view and 3) never knowingly enter inaccurate information. All volunteers should sign a Confidentiality Agreement prior to receiving surveys and the local coordinator can either keep them on file for a suggested period of three months in their own office or send the forms along with the surveys to the MT CoC Coalition.

Survey is Voluntary: Not all homeless persons will agree to participate or answer all of the questions for a variety of reasons and their decision should be respected. It is very important to let the homeless person know at the very outset that any information they provide is **voluntary, anonymous and confidential, that they simply say “pass” if they choose not to answer a question and passing on any question will in no way result in refusal of any services.**

Households: Consistent with the national protocol, the survey collects data that allows reporting out by three household types: 1) with children, 2) without children, 3) only children. Within those households other subpopulations, including veterans, chronically homeless, unaccompanied children and youth households (where head of household is 18-24 years of age), are also reported. The Homeless Survey has been designed to capture all of this data.

HUD defines a household as a group of persons that “present for services together,” whether they are related or not. Since this can be vague, our guidance is to start with the simple concept of a family or “group of persons who are living together and sleeping together” on the night of the survey. Married or

“partnered” couples are a single household, but adults who are merely traveling together are not and should be surveyed individually. If there is any doubt, we will trust the interviewers judgement.

If encountering persons who are doubled-up or couch-surfing, survey only the family or persons who are guests--not the principle residents.

Only one survey per household should be taken and to prevent duplicate surveys, try to survey the head of the household or at least provide the head of the household information for the identifier information (first name, last initial, day of birth). The head of the household would typically be the father of a two-parent household, or mother or father of a single-parent household or the person most responsible for caring for the family, such as the oldest person. In situations that don't fit any of these, surveyors must simply use their best judgment.

National Priority: 2017 data established the baseline for tracking homeless youth. It is therefore important that local survey organizers involve youth in the planning to identify where homeless youth will most likely be found on the night of the survey as well as finding interviewers who will have both the access and trust needed to conduct the surveys.

While surveys cannot be conducted in schools or on school property, coordinators are strongly encouraged to contact their school district Homeless Education Liaisons to explore the possibility of conducting focus groups with homeless youth in order to discuss how to best conduct outreach to homeless youth and how to best conduct the interview. Homeless liaisons can also be useful in recruiting volunteers that homeless youth might recognize and trust. A link to the Montana Office of Public Instruction Homeless Education Liaison list is:

<http://opi.mt.gov/Portals/182/Page%20Files/Title%20%26%20Other%20Federal%20Programs/Homeless%20Files/MT%20School%20District%20Homeless%20Liason.pdf>

Furthermore, the state Homeless Education Coordinator has encouraged all school liaisons to:

1. Share aggregate data about the number of homeless children and youth in your district.
2. Encourage families to participate in local events where they will be counted. (Find out where your local PIT count event will be held.)
3. Give your local PIT count people information about places where homeless youths and families tend to “hang out” during inclement weather.
4. Encourage staff to volunteer with the count. Families and students may be more open to working with people they already know and trust.

Coordinators are also encouraged to contact the LGBT community, e.g. a high school LGBT club or local PRIDE organization to ensure the most successful outreach to this critical homeless subpopulation.

#### Who Should Conduct a Survey

Surveys can be completed by; 1) an interviewer, 2) the homeless person him or herself, or 3) a case manager.

Interviewer: Homeless surveys are most successful when a homeless person is interviewed by a volunteer who will be accepted and trusted by the homeless. Experience also shows that the best interviewers are formerly or currently homeless persons themselves or outreach workers who might be recognized by the homeless in your community. This is especially true when conducting street counts and particularly important with youth and veterans.

Less experienced volunteers can still be effective interviewers in sheltered sites IF provided some orientation and training.

Every effort, therefore, is urged to recruit appropriate volunteers to conduct survey interviews.

Self: When it is not feasible to provide interviewers, the next best thing is to ask a person to fill out the survey him or herself. Even in these situations, however, every effort should be made to have a coordinator or volunteer close at hand to lend assistance, answer questions, immediately collect the completed survey and to keep track of the number of persons declining to be surveyed.

Case Manager: Another acceptable method is for a case manager to complete a survey on behalf of their client, but this should only be done when the case manager knows their client will not or cannot participate in the survey.

Surveys cannot be completed by friends or someone who is not an immediate family member on behalf of others.

#### **UNSHeltered SITE SURVEYS**

**How:** “Unsheltered” homeless are typically surveyed by “canvassing” areas where homeless are known to congregate, such as certain streets, neighborhoods, abandoned buildings, campgrounds or under bridges. Developing a list of these locations is the first step followed by recruiting, training and scheduling volunteers.

**Where:** Those who best know where to find the unsheltered homeless are current and formerly homeless, (especially youth and veterans), as well as law enforcement, outreach workers, homeless shelter and soup kitchen staff. It is critical that they be consulted when identifying sites to be canvassed. Some general locations that need to be considered include:

Campgrounds	Under bridges
Parks	Railroad tracks
Certain streets or neighborhoods	Certain motels
Abandoned buildings	Libraries

**Who:** Because “street canvassing” is done in the evening in areas that can be potentially unsafe, “who” does the surveying is important. Again, the most effective volunteers are current and formerly homeless persons themselves. PATH outreach workers and case managers or volunteers from emergency shelters are also preferred. It is strongly recommended that canvassers go out in teams of at least two.

**When:** The time for conducting the street canvass or outside survey is after shelters close their doors and the homeless have taken refuge for the night on January 25. The survey ends at sunrise on January 26<sup>th</sup>. This does not preclude coordinating surveys with such activities as a sponsored dinner (typically at an emergency shelter) for all homeless on the evening of the survey. No surveys should be conducted before Thursday, January 25<sup>th</sup>.

### **SERVICE-SITE SURVEYS**

**Why and how:** HUD recognizes that some unsheltered homeless can be missed on a single evening, especially in a rural state as vast as Montana. HUD therefore allows service-site counts to continue for another seven days. It is important to note, however, that only people who were homeless on the night of January 25th will be counted (the survey screens by asking where did you sleep on the night of the survey).

**Where:** Experience suggests that many of the homeless who might have been missed on this night are likely to go somewhere during the following week to receive assistance or to contact a social service case manager. It is important that each community planning effort identify and contact these service sites in their area and arrange for surveys to be administered. Just a few of the general types of sites include:

Food bank	Church
HRDC	Mental Health Center
Salvation Army	Job Service Office
Healthcare for Homeless Clinic	Public Assistance Office
Thrift Shop	Hospitals

Project Homeless Connect events occurring immediately or soon after the survey date are also considered to be part of the service-site effort.

**Who:** While most surveys at service sites are completed by homeless persons themselves, it is important to identify someone at each service-site who will be responsible for administering the survey, who understands the protocol, who will be present to lend assistance or answer questions and who will ensure that the surveys are collected and sent in.

**When:** Service-based locations do not begin surveying until after the sheltered and unsheltered surveys have finished on January 26<sup>th</sup> and they must end on February 1st.

### **SHELTERED SITE SURVEYS**

Because the Mt CoC Coalition is responsible for overseeing and implementing the Shelter Count, the following is provided as “For Your Information,” only and can be disregarded by local PIT coordinators.

**Where:** Every Emergency Shelter (ES), Domestic Violence Shelter (DVS), Transitional Housing (TH) site or program providing motel vouchers identified in the Housing Inventory must be included in the survey. Note: While CoC and ESG Rapid Rehousing and Permanent Supportive Housing sites are included in the Housing Inventory, they are not a part of the PIT Survey because they are defined as permanent housing.

**How:** The MT CoC will work with each facility to identify an on-site coordinator or contact, review the protocol, recruitment of interviewers/volunteers, and training plans, distribute surveys directly to them and ensure that collection arrangements are made and mutually understood.

On-site coordinators will be asked to fill out and sign a Cover Sheet that confirms:

1. the number of beds in their inventory dedicated to homeless on the night of the survey
2. the number of surveys completed for the survey
3. the number of persons covered in the surveys.

It is critical that the front page for every survey conducted at a shelter site be filled-in. Failure to do so results in that homeless person not being counted as staying in that facility and, therefore, the facility being underutilized. Facility site coordinators should check all surveys from their facility and fill this in if necessary (or better yet, pre-fill this in before surveying begins). Coordinators need to be sure that the exact facility name as listed in the inventory is used here. This box must also be filled by any organization providing a motel voucher.

**Who:** Use interviewers, e.g. shelter staff or volunteers, especially current or formerly homeless, whenever possible. It is also acceptable to ask residents to fill out the survey on their own, but this is best done in the presence of someone who can answer questions and be sure all surveys are collected.

**When:** Sheltered surveys should be conducted either in the evening of the 25<sup>th</sup> after check-in is complete or early the next morning but BEFORE ANYONE LEAVES. The sheltered survey effort concludes on the morning of January 26<sup>th</sup>. No surveys should be conducted before Thursday, January 25<sup>th</sup>.

### **HOTLINE**

A hotline will be available for any questions on the evening of January 25<sup>h</sup>. The hotline number is: 406-920-0468. For questions after this date, call the CoC Coordinator listed below.

### **DEADLINE, COLLECTION AND MAILING OF SURVEYS**

All surveys should be collected and sent to the following address by close of business on February 9th to:

MT CoC Coalition  
321 E. Main, Suite 316  
Bozeman, MT 59715

For questions or help, call MT CoC coordinator, Bob Buzzas, at 586-1572 or email at [bobbuzzas@gmail.com](mailto:bobbuzzas@gmail.com).

### **FINANCIAL SUPPORT FROM DPHHS**

The Montana Department of Health and Human Services supports achieving the most comprehensive survey possible by making mini-grants available to each local Continuum of Care district. Due to budget constraints, the maximum eligible amount in 2018 is capped at the amount the community received in 2017. **To be eligible for the grants, however, the local coordinating agency must have participated in a Coordinator Training provided by the MT CoC.** The funds can be used for such things as staff cost to recruit, organize and coordinate volunteers, incentives to survey participants, such as goody bags, volunteer stipends, expense or mileage reimbursements, feeding volunteers or using mobile applications. Use of the funds must be agreed upon by a local continuum of care group and a simple but informative statement of expenses submitted by March 1<sup>st</sup> to:

Marcia Lemon  
mlemon@mt.gov  
DPHHS/IHSB  
1400 Carter Dr  
Helena, MT 59604  
(406) 447-4276

### **RECORD KEEPING**

The PIT and HI are annual events and every effort should be made to keep good records and ensure they will be available to next year's organizers. Records should include, contact information for participating

agencies and volunteers, canvas site locations, survey distribution lists (with the number of surveys distributed to each), a description of the local survey and inventory process and any other organizing information that will be needed to conduct the survey next year. Be sure to share copies with others in your community CoC. You are also encouraged to send this information to the MT Continuum of Care Coalition (address and email are provided above) which will archive the information so it is retrievable in the event of staff turnover or it is lost.

#### **SURVEY DATA ACCESS**

Specific PIT data must be submitted to the HUD Data Exchange Site by April 30<sup>th</sup> and will also be available to the public on that date. The MT CoC also strives to have all the data available on its' query-based data website by the end of May: <http://mthomelessdata.com/>

***THANK YOU*** for helping to conduct this statewide survey.

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