



Homeward Board Meeting

November 12, 2024 / 12:00 PM-1:30 PM
RiverPlace – 2309 Euclid Avenue, Room 3
IN PERSON

1. **Welcome and Introductions**
2. **Approve Agenda***
3. **Consent Items***
 - 3.1. Homeward October 2024 Meeting Minutes
 - 3.2. July, August, and September Financial Statements
 - 3.3. Finance Committee Minutes
 - 3.4. Coordinated Services Committee Minutes
 - 3.5. Directors Advisory Council Minutes
 - 3.6. Performance Measures Committee Minutes
 - 3.7. Housing Work Group Minutes
 - 3.8. Centralized Intake September Monthly Report
4. **Finance Committee** – Tony Montgomery
 - 4.1. Homeward 990 Filing* - David Wall, Tarbell
5. **Grant Committee** – Fred Gaddy
 - 5.1. Notice of Funding Opportunities – Continuum of Care Update
 - 5.2. CoC Builds Letter of Support* – Greater Des Moines Supportive Housing – Emily Osweiler
6. **Executive Director’s Report** – Angie Arthur
7. **Business**
 - 7.1. Continuum of Care Membership
 - 7.2. Family Homelessness Study – Dr. Elizabeth Talbert – Drake University
8. **Public Comment/Announcements**
9. **Adjournment**

Next Meeting is December 9, 2024

* - Denotes voting item



**Homeward Board Meeting
Minutes**

October 14, 2024 / 12:00 PM-1:30 PM
RiverPlace – 2309 Euclid Avenue, Room 1A
IN PERSON

Present: Annie Uetz, Tony Montgomery, Frederick Gaddy, Elijah Williams, Taylor Petersen, Amber Lewis, Lyn Wilson, Luke Lynch, David Weidt, Katie Snell, Amanda Wanke, Rusty Johnson, Alyson Simmons, Margaret Acosta-Weirich, Nathan Simpson

Absent: Whitney Warnke, Rebecca Foster, Lorna Garcia, Ehren Stover-Wright, Dannie Patrick, Manisha Paudel, Lori Jensen, Jennifer Miner

Guests: Jeremy Orcutt, Patrick Schacherer, Courtney Guntly, Mariah Breeze, Melissa O'Neill, John Mahar (Merriweather)

Staff: Angie Arthur, Jim Cain, Amy Croll

1. Welcome and Introductions

Meeting was opened at 12:04 pm by board chair by Annie Uetz.

2. Approve Agenda*

Margaret moved to approve the agenda. Amanda seconded. All approved. Motion passes.

3. Consent Items*

- 3.1. Homeward September 2024 Meeting Minutes
- 3.2. August Financial Statements
- 3.3. Finance Committee Minutes
- 3.4. Coordinated Services Committee Minutes
- 3.5. Directors Advisory Council Minutes
- 3.6. Centralized Intake September Monthly Report
- 3.7. Letter of Support – The Beacon Recovery Housing Fund

Eli motioned to approve the consent agenda. Alyson seconded. All approved. Motion passes.

4. Finance Committee – Tony Montgomery

4.1. Final Audit Report*

This is the first time Homeward has done a complete audit as its first year independent of Polk County Housing Trust Fund. The audit committee accepted the full audit and is presenting it for full board approval. John from Merriweather (auditing firm) presented the audit. Management letter is addressed to the Board of Directors. No significant deficiencies were identified or reported in the letter.

* - Denotes voting item



Homeward has an unqualified audit, which is the cleanest report possible.

- Financial statements are GAAP compliant.
- Net assets are broken into two categories: unrestricted (\$397,744) and restricted (\$199,430). Total net assets are \$597,174.
- John highlighted the need to operate as a for-profit for long-term financial strength of the organization.
- Notes to the financial statements highlight the liquidity and availability of Homeward as \$418,194.

The board does not need a motion as this was forwarded from the finance committee. All are in favor of receiving and approving the financial statements.

5. **Grant Committee** – Fred Gaddy

5.1. Notice of Funding Opportunities

5.1.1. Update on Continuum of Care Competitive Application

We approved \$6.4 million in allocations, which were approved by the city council on October 7, 2024. Agencies were notified of allocations. The collaborative application will be posted by October 23, 2024, for public comment.

5.1.2. Update on Continuum of Care (CoC) Builds Application

Greater Des Moines Supportive Housing has expressed interest in applying, but without the ability to meet some experience requirements, the City of Des Moines will be the formal applicant. If funded, it would help provide 140 units. The Homeward team will work with the City of Des Moines and Greater Des Moines Supportive Housing to submit the application. A letter of support will need to be approved by the Homeward board and the City of Des Moines City Council.

6. **Communication Committee** – Amanda Wanke

6.1. Annual Report

Amanda reported that the annual report is ready to be released. There's a significant number of statistics, infographics, and highlights included. A press release will go out on Tuesday, Oct 15th and the document will be posted on the social media locations, website, etc.

For next year, Homeward's goal is to separate the report into a community-level report and then a Homeward-specific report.

7. **Executive Director's Report** – Angie Arthur

- Staff is working on the collaborative application. Homeward is assured of the first 90% of our application and the remaining 10% of the application are based on the collaborative application.
- Housing Innovations is scheduled to be here on Friday, October 18th to conduct the first strategic planning session. There will be a conversation with those with lived experience from 1-3 pm on Friday as well. He will then speak with service providers.

* - Denotes voting item

HOMeward

Additional work will be done with community focus groups and in-person meetings with stakeholders.

- We continue to work with the City of Des Moines, City of West Des Moines, and IFA on Consolidated Plans. Public comment is being accepted for the Conditions on the Impediments to Fair Housing on November 4, 2024. Data from over 2,000 individuals was provided to the appropriate planning entities for inclusion in their plans.
- Iowa Homelessness Coalition is moving forward as a 5013b. This group will be a membership group to advocacy.
- Conflict of interest documents are still needed by some board members. Please sign if you have not yet done so.
- We have been on River to River with IPR and have been working with the Des Moines Register and Axios as they record.

8. Business

8.1. Youth Homelessness System Improvement – Amy Croll

Amy gave an overview of the YHSI grant and introduced Jason Smith and Mariah Breeze. Mariah introduced herself.

8.2. CoC Membership – Jim Cain

In the last year, Homeward has worked to create a CoC Membership process. With website updates, staff has added a form on the website that will allow for ongoing membership solicitation. Over time, this will be transferred to an automatic process.

Jim described the membership process. The membership decides items like the membership charter.

Sign-in sheets will document ongoing engagement.

9. Public Comment/Announcements

- Polk County Life Services Center – October 23, 2024 at 11:00 am open house. New sobering center will be housed here as well other services that are currently housed at Broadlawns.
- Annie would like to thank the City of Urbandale for contacting Bob Brownell to outfit the Monarch Apartments and CFI with new furnishings. In total, 36 mattresses, 42 bed frames, box springs, TVs, lamps, and other furniture.
- Margaret Weirich reported that people are receiving camping notices. Polk County Conservation and the Federal Corps of Engineers have continued to issue notices. Amber confirmed these are not city-issued notices.
- Amy stated the YAC is hosting Amber to speak to youth about the city ordinances. This has not been widely advertised as it is a targeted opportunity.

10. Adjournment

Amanda motioned to adjourn. Rusty seconded. Meet adjourned at 12:50 pm.

*Next Meeting is November 12, 2024
moved due to Veterans' Day observance*

* - Denotes voting item

TARBELL & CO, PLC

A CERTIFIED PUBLIC ACCOUNTING FIRM

Accountants' Compilation Report

To the Board of Directors of:

Homeward Iowa
505 Fifth Avenue, Suite 1010
Des Moines, IA 50309

Management is responsible for the accompanying financial statements of Homeward Iowa which comprise the Statements of Assets, Liabilities, and Net Assets- Modified Cash Basis as of July 31, 2024 and 2023, and the related Statements of Revenues and Expenses- Modified Cash Basis for the one month ended July 31, 2024 and 2023, in accordance with the modified cash basis of accounting, and for determining that the modified cash basis of accounting is an acceptable financial reporting framework. We have performed compilation engagements in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

The financial statements are prepared in accordance with the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America.

Management has elected to omit substantially all the disclosures ordinarily included in financial statements prepared in accordance with the modified cash basis of accounting. If the omitted disclosures were included in the financial statements, they might influence the user's conclusions about the Company's Assets, Liabilities, Net Assets, Revenues, and Expenses. Accordingly, the financial statements are not designed for those who are not informed about such matters.

The supplementary information contained in the Statements of Revenues and Expenses – Budget vs Actual for the one month ended July 31, 2024 is presented for purposed of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.

We are not independent with respect to Homeward Iowa.

Tarbell & CO., P.L.C.

Tarbell & Co., P.L.C.
West Des Moines, IA
A Certified Public Accounting Firm
October 16, 2024

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Homeward Iowa
Statement of Assets, Liabilities, and Net Assets
Modified Cash Basis

	<u>Jul 31, 24</u>	<u>Jul 31, 23</u>
ASSETS		
Current Assets		
Checking/Savings		
102 · Operational checking account	39,433.27	59,606.58
104 · Business primary share savings	100.00	100.00
106 · Ultra business money market	754.40	595,415.90
107 · Business exclusive money market	550,753.52	0.00
108 · Youth action council checking	1,408.93	5,500.61
110 · Online app checking	239.51	250.00
Total Checking/Savings	<u>592,689.63</u>	<u>660,873.09</u>
Accounts Receivable		
120 · Accounts Receivable	0.00	10,397.80
Total Accounts Receivable	<u>0.00</u>	<u>10,397.80</u>
Other Current Assets		
139 · Prepaid expenses	1,500.00	0.00
Total Other Current Assets	<u>1,500.00</u>	<u>0.00</u>
Total Current Assets	<u>594,189.63</u>	<u>671,270.89</u>
TOTAL ASSETS	<u>594,189.63</u>	<u>671,270.89</u>
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
200 · Accounts Payable	0.00	1,897.35
Total Accounts Payable	<u>0.00</u>	<u>1,897.35</u>
Other Current Liabilities		
241 · Accrued PTO	11,225.58	0.00
Total Other Current Liabilities	<u>11,225.58</u>	<u>0.00</u>
Total Current Liabilities	<u>11,225.58</u>	<u>1,897.35</u>
Total Liabilities	<u>11,225.58</u>	<u>1,897.35</u>
Equity		
290 · Unrestricted Net Assets	397,743.45	640,897.80
292 · Temporarily restricted	199,430.00	0.00
Net Income	(14,209.40)	28,475.74
Total Equity	<u>582,964.05</u>	<u>669,373.54</u>
TOTAL LIABILITIES & EQUITY	<u>594,189.63</u>	<u>671,270.89</u>

Homeward Iowa
Statements of Revenues and Expenses
Modified Cash Basis

	Jul 24	Jul 23
Ordinary Income/Expense		
Income		
306 · Investment interest income	2,293.92	1,419.69
313 · HUD Planning Grant	0.00	51,507.57
376 · Unrestricted funding	125.00	0.00
	2,418.92	52,927.26
Total Income		
Expense		
Program Commitments		
491 · Youth Action Council	685.00	340.00
	685.00	340.00
Total Program Commitments		
Staff Costs		
511 · Salaries	9,925.08	16,108.84
512 · Employee benefits	949.65	1,036.40
514 · Payroll taxes	1,496.00	1,528.28
515 · Retirement plan	872.51	302.68
522 · PEO	253.38	1,793.38
589 · Mileage	0.00	66.15
	13,496.62	20,835.73
Total Staff Costs		
Insurances		
525 · Workers compensation	93.45	34.59
	93.45	34.59
Total Insurances		
Office Expenses		
530 · Parking	553.65	17.00
532 · Office rent	1,500.00	3,000.00
534 · Telephone/internet	0.00	60.00
	2,053.65	3,077.00
Total Office Expenses		
Technology		
541 · Equipment maintenance	299.60	0.00
	299.60	0.00
Total Technology		
Education/Advocacy		
573 · Advertising/marketing	0.00	164.20
	0.00	164.20
Total Education/Advocacy		
Total Expense	16,628.32	24,451.52
Net Ordinary Income	(14,209.40)	28,475.74
Net Income	(14,209.40)	28,475.74

Homeward Iowa
Statements of Revenues and Expenses - Budget vs Actual
Modified Cash Basis

	Jul 24	Budget	Jul 24	YTD Budget	Annual Budget
Ordinary Income/Expense					
Income					
301 · Polk County investment	0.00	0.00	0.00	0.00	75,000.00
306 · Investment interest income	2,293.92	0.00	2,293.92	0.00	0.00
312 · City of Des Moines	0.00	12,500.00	0.00	12,500.00	150,000.00
313 · HUD Planning Grant	0.00	19,902.67	0.00	19,902.67	238,832.00
376 · Unrestricted funding	125.00	2,083.33	125.00	2,083.33	25,000.00
377 · Individual donations	0.00	416.67	0.00	416.67	5,000.00
378 · Restricted funding	0.00	7,083.34	0.00	7,083.34	85,000.00
Total Income	2,418.92	41,986.01	2,418.92	41,986.01	578,832.00
Expense					
Program Commitments					
410 · Point in Time	0.00	200.00	0.00	200.00	2,400.00
418 · Community Case Manager Pilot	0.00	6,250.00	0.00	6,250.00	75,000.00
420 · Lived expertise council	0.00	625.00	0.00	625.00	7,500.00
491 · Youth Action Council	685.00	625.00	685.00	625.00	7,500.00
590 · Centralized Intake	0.00	4,166.67	0.00	4,166.67	50,000.00
591 · CoC Training	0.00	833.33	0.00	833.33	10,000.00
594 · Rapid Resolution	0.00	2,083.34	0.00	2,083.34	25,000.00
Total Program Commitments	685.00	14,783.34	685.00	14,783.34	177,400.00
Professional Fees					
501 · Misc professional fees	0.00	833.33	0.00	833.33	10,000.00
502 · Accounting services	0.00	600.00	0.00	600.00	7,200.00
503 · Audit fees	0.00	1,500.00	0.00	1,500.00	18,000.00
Total Professional Fees	0.00	2,933.33	0.00	2,933.33	35,200.00
Staff Costs					
511 · Salaries	9,925.08	23,963.00	9,925.08	23,963.00	287,556.00
512 · Employee benefits	949.65	1,666.67	949.65	1,666.67	20,000.00
514 · Payroll taxes	1,496.00	1,833.25	1,496.00	1,833.25	21,999.00
515 · Retirement plan	872.51	1,198.17	872.51	1,198.17	14,378.00
522 · PEO	253.38	575.00	253.38	575.00	6,900.00
589 · Mileage	0.00	41.66	0.00	41.66	500.00
Total Staff Costs	13,496.62	29,277.75	13,496.62	29,277.75	351,333.00
Insurances					
523 · D & O	0.00	116.67	0.00	116.67	1,400.00
524 · General liability and rental	0.00	20.83	0.00	20.83	250.00
525 · Workers compensation	93.45	63.33	93.45	63.33	760.00
Total Insurances	93.45	200.83	93.45	200.83	2,410.00

Homeward Iowa
Statements of Revenues and Expenses - Budget vs Actual
Modified Cash Basis

	Jul 24	Budget	Jul 24	YTD Budget	Annual Budget
Office Expenses					
530 · Parking	553.65	300.00	553.65	300.00	3,600.00
531 · Office material and supplies	0.00	58.33	0.00	58.33	700.00
532 · Office rent	1,500.00	1,500.00	1,500.00	1,500.00	18,000.00
534 · Telephone/internet	0.00	208.33	0.00	208.33	2,500.00
535 · Filing fees	0.00	16.67	0.00	16.67	200.00
536 · Postage	0.00	16.66	0.00	16.66	200.00
537 · Printing expense	0.00	41.67	0.00	41.67	500.00
Total Office Expenses	2,053.65	2,141.66	2,053.65	2,141.66	25,700.00
Technology					
541 · Equipment maintenance	299.60	450.00	299.60	450.00	5,400.00
543 · Equipment replacement/software	0.00	250.00	0.00	250.00	3,000.00
544 · Data for HMIS	0.00	666.67	0.00	666.67	8,000.00
Total Technology	299.60	1,366.67	299.60	1,366.67	16,400.00
Fundraising					
554 · Customer relationship mgmt	0.00	166.67	0.00	166.67	2,000.00
588 · Development plan	0.00	833.33	0.00	833.33	10,000.00
Total Fundraising	0.00	1,000.00	0.00	1,000.00	12,000.00
Education/Advocacy					
573 · Advertising/marketing	0.00	833.34	0.00	833.34	10,000.00
575 · Electronic media	0.00	125.00	0.00	125.00	1,500.00
580 · Tickets	0.00	250.00	0.00	250.00	3,000.00
593 · eNewsletter	0.00	20.83	0.00	20.83	250.00
Total Education/Advocacy	0.00	1,229.17	0.00	1,229.17	14,750.00
Staff and Board Development					
581 · Dues/subscriptions/memberships	0.00	83.33	0.00	83.33	1,000.00
582 · Continuing education	0.00	916.67	0.00	916.67	11,000.00
583 · Board and committee meetings	0.00	416.66	0.00	416.66	5,000.00
585 · Strategic Plan/Project Managemen	0.00	416.67	0.00	416.67	5,000.00
Total Staff and Board Development	0.00	1,833.33	0.00	1,833.33	22,000.00
Total Expense	16,628.32	54,766.08	16,628.32	54,766.08	657,193.00
Net Ordinary Income	(14,209.40)	(12,780.07)	(14,209.40)	(12,780.07)	(78,361.00)
Net Income	(14,209.40)	(12,780.07)	(14,209.40)	(12,780.07)	(78,361.00)

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We are not independent with respect to Homeward Iowa.

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October 16, 2024

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Homeward Iowa
Statement of Assets, Liabilities, and Net Assets
Modified Cash Basis

	Aug 31, 24	Aug 31, 23
ASSETS		
Current Assets		
Checking/Savings		
102 · Operational checking account	32,129.94	5,476.21
104 · Business primary share savings	100.00	100.00
106 · Ultra business money market	754.40	421,188.02
107 · Business exclusive money market	703,219.92	0.00
108 · Youth action council checking	1,009.04	4,751.06
110 · Online app checking	164.51	50.85
Total Checking/Savings	737,377.81	431,566.14
Accounts Receivable		
120 · Accounts Receivable	0.00	10,397.80
Total Accounts Receivable	0.00	10,397.80
Other Current Assets		
139 · Prepaid expenses	1,500.00	0.00
111 · CCCU CD- 2109	0.00	250,000.00
Total Other Current Assets	1,500.00	250,000.00
Total Current Assets	738,877.81	691,963.94
TOTAL ASSETS	738,877.81	691,963.94
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
241 · Accrued PTO	11,225.58	0.00
Total Other Current Liabilities	11,225.58	0.00
Total Current Liabilities	11,225.58	0.00
Total Liabilities	11,225.58	0.00
Equity		
290 · Unrestricted Net Assets	397,743.45	640,897.80
292 · Temporarily restricted	199,430.00	0.00
Net Income	130,478.78	51,066.14
Total Equity	727,652.23	691,963.94
TOTAL LIABILITIES & EQUITY	738,877.81	691,963.94

Homeward Iowa
Statements of Revenues and Expenses
Modified Cash Basis

	Jul - Aug 24	Jul - Aug 23
Ordinary Income/Expense		
Income		
301 · Polk County investment	125,000.00	75,000.00
306 · Investment interest income	4,763.22	2,196.72
313 · HUD Planning Grant	0.00	51,507.57
376 · Unrestricted funding	250.00	0.00
377 · Individual donations	33.81	0.00
378 · Restricted funding	75,150.00	0.00
Total Income	205,197.03	128,704.29
Expense		
Program Commitments		
418 · Community Case Manager Pilot	18,750.00	18,750.00
491 · Youth Action Council	1,347.67	1,541.49
590 · Centralized Intake	0.00	8,333.34
Total Program Commitments	20,097.67	28,624.83
Professional Fees		
502 · Accounting services	515.00	0.00
Total Professional Fees	515.00	0.00
Staff Costs		
511 · Salaries	39,998.55	33,016.95
512 · Employee benefits	1,899.30	881.68
514 · Payroll taxes	3,769.72	3,045.86
515 · Retirement plan	2,193.14	896.77
522 · PEO	633.45	2,046.76
589 · Mileage	0.00	137.07
Total Staff Costs	48,494.16	40,025.09
Insurances		
525 · Workers compensation	234.80	111.41
Total Insurances	234.80	111.41
Office Expenses		
530 · Parking	833.80	210.70
531 · Office material and supplies	10.70	290.59
532 · Office rent	3,000.00	4,500.00
534 · Telephone/internet	82.37	60.00
535 · Filing fees	0.00	32.50
Total Office Expenses	3,926.87	5,093.79
Technology		
541 · Equipment maintenance	599.20	0.00
543 · Equipment replacement/software	0.00	395.25
Total Technology	599.20	395.25
Education/Advocacy		
573 · Advertising/marketing	0.00	164.20
575 · Electronic media	231.12	0.00
Total Education/Advocacy	231.12	164.20

Homeward Iowa
Statements of Revenues and Expenses
Modified Cash Basis

	Jul - Aug 24	Jul - Aug 23
Staff and Board Development		
581 · Dues/subscriptions/memberships	21.39	1.07
582 · Continuing education	559.26	1,084.51
583 · Board and committee meetings	38.78	18.00
585 · Strategic Plan/Project Manageme	0.00	2,120.00
	619.43	3,223.58
Total Staff and Board Development		
Total Expense	74,718.25	77,638.15
Net Ordinary Income	130,478.78	51,066.14
Net Income	130,478.78	51,066.14

Homeward Iowa
Statements of Revenues and Expenses - Budget vs Actual
Modified Cash Basis

	Aug 24	Budget	Jul - Aug 24	YTD Budget	Annual Budget
Ordinary Income/Expense					
Income					
301 · Polk County investment	125,000.00	75,000.00	125,000.00	75,000.00	75,000.00
306 · Investment interest income	2,469.30	0.00	4,763.22	0.00	0.00
312 · City of Des Moines	0.00	12,500.00	0.00	25,000.00	150,000.00
313 · HUD Planning Grant	0.00	19,902.66	0.00	39,805.33	238,832.00
376 · Unrestricted funding	125.00	2,083.33	250.00	4,166.66	25,000.00
377 · Individual donations	33.81	416.67	33.81	833.34	5,000.00
378 · Restricted funding	75,150.00	7,083.33	75,150.00	14,166.67	85,000.00
Total Income	202,778.11	116,985.99	205,197.03	158,972.00	578,832.00
Expense					
Program Commitments					
410 · Point in Time	0.00	200.00	0.00	400.00	2,400.00
418 · Community Case Manager Pilot	18,750.00	6,250.00	18,750.00	12,500.00	75,000.00
420 · Lived expertise council	0.00	625.00	0.00	1,250.00	7,500.00
491 · Youth Action Council	662.67	625.00	1,347.67	1,250.00	7,500.00
590 · Centralized Intake	0.00	4,166.67	0.00	8,333.34	50,000.00
591 · CoC Training	0.00	833.34	0.00	1,666.67	10,000.00
594 · Rapid Resolution	0.00	2,083.33	0.00	4,166.67	25,000.00
Total Program Commitments	19,412.67	14,783.34	20,097.67	29,566.68	177,400.00
Professional Fees					
501 · Misc professional fees	0.00	833.34	0.00	1,666.67	10,000.00
502 · Accounting services	515.00	600.00	515.00	1,200.00	7,200.00
503 · Audit fees	0.00	1,500.00	0.00	3,000.00	18,000.00
Total Professional Fees	515.00	2,933.34	515.00	5,866.67	35,200.00
Staff Costs					
511 · Salaries	30,073.47	23,963.00	39,998.55	47,926.00	287,556.00
512 · Employee benefits	949.65	1,666.67	1,899.30	3,333.34	20,000.00
514 · Payroll taxes	2,273.72	1,833.25	3,769.72	3,666.50	21,999.00
515 · Retirement plan	1,320.63	1,198.16	2,193.14	2,396.33	14,378.00
522 · PEO	380.07	575.00	633.45	1,150.00	6,900.00
589 · Mileage	0.00	41.67	0.00	83.33	500.00
Total Staff Costs	34,997.54	29,277.75	48,494.16	58,555.50	351,333.00
Insurances					
523 · D & O	0.00	116.67	0.00	233.34	1,400.00
524 · General liability and rental	0.00	20.84	0.00	41.67	250.00
525 · Workers compensation	141.35	63.33	234.80	126.66	760.00
Total Insurances	141.35	200.84	234.80	401.67	2,410.00

Homeward Iowa
Statements of Revenues and Expenses - Budget vs Actual
Modified Cash Basis

	Aug 24	Budget	Jul - Aug 24	YTD Budget	Annual Budget
Office Expenses					
530 · Parking	280.15	300.00	833.80	600.00	3,600.00
531 · Office material and supplies	10.70	58.34	10.70	116.67	700.00
532 · Office rent	1,500.00	1,500.00	3,000.00	3,000.00	18,000.00
534 · Telephone/internet	82.37	208.34	82.37	416.67	2,500.00
535 · Filing fees	0.00	16.66	0.00	33.33	200.00
536 · Postage	0.00	16.67	0.00	33.33	200.00
537 · Printing expense	0.00	41.66	0.00	83.33	500.00
Total Office Expenses	1,873.22	2,141.67	3,926.87	4,283.33	25,700.00
Technology					
541 · Equipment maintenance	299.60	450.00	599.20	900.00	5,400.00
543 · Equipment replacement/software	0.00	250.00	0.00	500.00	3,000.00
544 · Data for HMIS	0.00	666.67	0.00	1,333.34	8,000.00
Total Technology	299.60	1,366.67	599.20	2,733.34	16,400.00
Fundraising					
554 · Customer relationship mgmt	0.00	166.66	0.00	333.33	2,000.00
588 · Development plan	0.00	833.34	0.00	1,666.67	10,000.00
Total Fundraising	0.00	1,000.00	0.00	2,000.00	12,000.00
Education/Advocacy					
573 · Advertising/marketing	0.00	833.33	0.00	1,666.67	10,000.00
575 · Electronic media	231.12	125.00	231.12	250.00	1,500.00
580 · Tickets	0.00	250.00	0.00	500.00	3,000.00
593 · eNewsletter	0.00	20.84	0.00	41.67	250.00
Total Education/Advocacy	231.12	1,229.17	231.12	2,458.34	14,750.00
Staff and Board Development					
581 · Dues/subscriptions/memberships	21.39	83.33	21.39	166.66	1,000.00
582 · Continuing education	559.26	916.67	559.26	1,833.34	11,000.00
583 · Board and committee meetings	38.78	416.67	38.78	833.33	5,000.00
585 · Strategic Plan/Project Managemen	0.00	416.67	0.00	833.34	5,000.00
Total Staff and Board Development	619.43	1,833.34	619.43	3,666.67	22,000.00
Total Expense	58,089.93	54,766.12	74,718.25	109,532.20	657,193.00
Net Ordinary Income	144,688.18	62,219.87	130,478.78	49,439.80	(78,361.00)
Net Income	144,688.18	62,219.87	130,478.78	49,439.80	(78,361.00)

TARBELL & CO, PLC

A CERTIFIED PUBLIC ACCOUNTING FIRM

Accountants' Compilation Report

To the Board of Directors of:

Homeward Iowa
505 Fifth Avenue, Suite 1010
Des Moines, IA 50309

Management is responsible for the accompanying financial statements of Homeward Iowa which comprise the Statements of Assets, Liabilities, and Net Assets- Modified Cash Basis as of September 30, 2024 and 2023, and the related Statements of Revenues and Expenses- Modified Cash Basis for the three months ended September 30, 2024 and 2023, in accordance with the modified cash basis of accounting, and for determining that the modified cash basis of accounting is an acceptable financial reporting framework. We have performed compilation engagements in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements.

The financial statements are prepared in accordance with the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America.

Management has elected to omit substantially all the disclosures ordinarily included in financial statements prepared in accordance with the modified cash basis of accounting. If the omitted disclosures were included in the financial statements, they might influence the user's conclusions about the Company's Assets, Liabilities, Net Assets, Revenues, and Expenses. Accordingly, the financial statements are not designed for those who are not informed about such matters.

The supplementary information contained in the Statements of Revenues and Expenses – Budget vs Actual for the one month and three months ended September 30, 2024 is presented for purposed of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management. The supplementary information was subject to our compilation engagement. We have not audited or reviewed the supplementary information and do not express an opinion, a conclusion, nor provide any assurance on such information.

We are not independent with respect to Homeward Iowa.

Tarbell & CO., P.L.C.

Tarbell & Co., P.L.C.
West Des Moines, IA
A Certified Public Accounting Firm
October 16, 2024

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Homeward Iowa
Statement of Assets, Liabilities, and Net Assets
Modified Cash Basis

	Sep 30, 24	Sep 30, 23
ASSETS		
Current Assets		
Checking/Savings		
102 · Operational checking account	45,244.83	8,000.98
104 · Business primary share savings	100.00	100.00
106 · Ultra business money market	754.40	261,750.06
107 · Business exclusive money market	656,027.81	0.00
108 · Youth action council checking	709.11	3,301.37
110 · Online app checking	184.51	269.51
Total Checking/Savings	703,020.66	273,421.92
Accounts Receivable		
120 · Accounts Receivable	0.00	10,397.80
Total Accounts Receivable	0.00	10,397.80
Other Current Assets		
139 · Prepaid expenses	1,500.00	0.00
111 · CCCU CD- 2109	0.00	251,729.45
112 · CCCU CD- 2321	0.00	100,217.39
Total Other Current Assets	1,500.00	351,946.84
Total Current Assets	704,520.66	635,766.56
TOTAL ASSETS	704,520.66	635,766.56
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
235 · ARPA Deferred Revenue	0.00	303,160.95
241 · Accrued PTO	11,225.58	0.00
Total Other Current Liabilities	11,225.58	303,160.95
Total Current Liabilities	11,225.58	303,160.95
Total Liabilities	11,225.58	303,160.95
Equity		
290 · Unrestricted Net Assets	397,743.45	265,897.80
292 · Temporarily restricted	199,430.00	0.00
Net Income	96,121.63	66,707.81
Total Equity	693,295.08	332,605.61
TOTAL LIABILITIES & EQUITY	704,520.66	635,766.56

Homeward Iowa
Statements of Revenues and Expenses
Modified Cash Basis

	Jul - Sep 24	Jul - Sep 23
Ordinary Income/Expense		
Income		
301 · Polk County investment	125,000.00	75,000.00
306 · Investment interest income	7,573.71	4,707.65
312 · City of Des Moines	0.00	71,839.05
313 · HUD Planning Grant	0.00	51,507.57
376 · Unrestricted funding	375.00	0.00
377 · Individual donations	33.81	20.00
378 · Restricted funding	75,150.00	0.00
	208,132.52	203,074.27
Expense		
Program Commitments		
417 · Intergenerational Homeless Stud	0.00	12,500.00
418 · Community Case Manager Pilot	18,750.00	18,750.00
491 · Youth Action Council	1,627.67	3,128.14
590 · Centralized Intake	0.00	12,500.01
	20,377.67	46,878.15
Professional Fees		
502 · Accounting services	1,030.00	1,000.00
503 · Audit fees	8,795.00	0.00
	9,825.00	1,000.00
Staff Costs		
511 · Salaries	60,266.95	60,137.82
512 · Employee benefits	2,848.95	1,639.78
514 · Payroll taxes	5,295.13	5,482.59
515 · Retirement plan	3,082.47	1,782.27
522 · PEO	886.83	2,499.90
589 · Mileage	0.00	137.07
	72,380.33	71,679.43
Insurances		
525 · Workers compensation	330.07	234.21
	330.07	234.21
Office Expenses		
530 · Parking	1,120.40	383.65
531 · Office material and supplies	10.70	290.59
532 · Office rent	4,500.00	6,000.00
534 · Telephone/internet	164.74	169.46
535 · Filing fees	0.00	62.50
	5,795.84	6,906.20
Technology		
541 · Equipment maintenance	898.80	2,130.70
543 · Equipment replacement/software	640.93	440.25
	1,539.73	2,570.95
Education/Advocacy		
573 · Advertising/marketing	0.00	164.20
575 · Electronic media	642.00	424.65
	642.00	588.85

Homeward Iowa
Statements of Revenues and Expenses
Modified Cash Basis

	<u>Jul - Sep 24</u>	<u>Jul - Sep 23</u>
Staff and Board Development		
581 · Dues/subscriptions/memberships	417.78	2.14
582 · Continuing education	559.26	1,359.38
583 · Board and committee meetings	143.21	3,027.15
585 · Strategic Plan/Project Management	0.00	2,120.00
Total Staff and Board Development	<u>1,120.25</u>	<u>6,508.67</u>
Total Expense	<u>112,010.89</u>	<u>136,366.46</u>
Net Ordinary Income	<u>96,121.63</u>	<u>66,707.81</u>
Net Income	<u>96,121.63</u>	<u>66,707.81</u>

Homeward Iowa
Statements of Revenues and Expenses - Budget vs Actual
Modified Cash Basis

	Sep 24	Budget	Jul - Sep 24	YTD Budget	Annual Budget
Ordinary Income/Expense					
Income					
301 · Polk County investment	0.00	0.00	125,000.00	75,000.00	75,000.00
306 · Investment interest income	2,810.49	0.00	7,573.71	0.00	0.00
312 · City of Des Moines	0.00	12,500.00	0.00	37,500.00	150,000.00
313 · HUD Planning Grant	0.00	19,902.67	0.00	59,708.00	238,832.00
376 · Unrestricted funding	125.00	2,083.34	375.00	6,250.00	25,000.00
377 · Individual donations	0.00	416.66	33.81	1,250.00	5,000.00
378 · Restricted funding	0.00	7,083.33	75,150.00	21,250.00	85,000.00
Total Income	2,935.49	41,986.00	208,132.52	200,958.00	578,832.00
Expense					
Program Commitments					
410 · Point in Time	0.00	200.00	0.00	600.00	2,400.00
418 · Community Case Manager Pilot	0.00	6,250.00	18,750.00	18,750.00	75,000.00
420 · Lived expertise council	0.00	625.00	0.00	1,875.00	7,500.00
491 · Youth Action Council	280.00	625.00	1,627.67	1,875.00	7,500.00
590 · Centralized Intake	0.00	4,166.66	0.00	12,500.00	50,000.00
591 · CoC Training	0.00	833.33	0.00	2,500.00	10,000.00
594 · Rapid Resolution	0.00	2,083.33	0.00	6,250.00	25,000.00
Total Program Commitments	280.00	14,783.32	20,377.67	44,350.00	177,400.00
Professional Fees					
501 · Misc professional fees	0.00	833.33	0.00	2,500.00	10,000.00
502 · Accounting services	515.00	600.00	1,030.00	1,800.00	7,200.00
503 · Audit fees	8,795.00	1,500.00	8,795.00	4,500.00	18,000.00
Total Professional Fees	9,310.00	2,933.33	9,825.00	8,800.00	35,200.00
Staff Costs					
511 · Salaries	20,268.40	23,963.00	60,266.95	71,889.00	287,556.00
512 · Employee benefits	949.65	1,666.66	2,848.95	5,000.00	20,000.00
514 · Payroll taxes	1,525.41	1,833.25	5,295.13	5,499.75	21,999.00
515 · Retirement plan	889.33	1,198.17	3,082.47	3,594.50	14,378.00
522 · PEO	253.38	575.00	886.83	1,725.00	6,900.00
589 · Mileage	0.00	41.67	0.00	125.00	500.00
Total Staff Costs	23,886.17	29,277.75	72,380.33	87,833.25	351,333.00
Insurances					
523 · D & O	0.00	116.66	0.00	350.00	1,400.00
524 · General liability and rental	0.00	20.83	0.00	62.50	250.00
525 · Workers compensation	95.27	63.34	330.07	190.00	760.00
Total Insurances	95.27	200.83	330.07	602.50	2,410.00

Homeward Iowa
Statements of Revenues and Expenses - Budget vs Actual
Modified Cash Basis

	Sep 24	Budget	Jul - Sep 24	YTD Budget	Annual Budget
Office Expenses					
530 · Parking	286.60	300.00	1,120.40	900.00	3,600.00
531 · Office material and supplies	0.00	58.33	10.70	175.00	700.00
532 · Office rent	1,500.00	1,500.00	4,500.00	4,500.00	18,000.00
534 · Telephone/internet	82.37	208.33	164.74	625.00	2,500.00
535 · Filing fees	0.00	16.67	0.00	50.00	200.00
536 · Postage	0.00	16.67	0.00	50.00	200.00
537 · Printing expense	0.00	41.67	0.00	125.00	500.00
Total Office Expenses	1,868.97	2,141.67	5,795.84	6,425.00	25,700.00
Technology					
541 · Equipment maintenance	299.60	450.00	898.80	1,350.00	5,400.00
543 · Equipment replacement/software	640.93	250.00	640.93	750.00	3,000.00
544 · Data for HMIS	0.00	666.67	0.00	2,000.01	8,000.00
Total Technology	940.53	1,366.67	1,539.73	4,100.01	16,400.00
Fundraising					
554 · Customer relationship mgmt	0.00	166.67	0.00	500.00	2,000.00
588 · Development plan	0.00	833.33	0.00	2,500.00	10,000.00
Total Fundraising	0.00	1,000.00	0.00	3,000.00	12,000.00
Education/Advocacy					
573 · Advertising/marketing	0.00	833.33	0.00	2,500.00	10,000.00
575 · Electronic media	410.88	125.00	642.00	375.00	1,500.00
580 · Tickets	0.00	250.00	0.00	750.00	3,000.00
593 · eNewsletter	0.00	20.83	0.00	62.50	250.00
Total Education/Advocacy	410.88	1,229.16	642.00	3,687.50	14,750.00
Staff and Board Development					
581 · Dues/subscriptions/memberships	396.39	83.34	417.78	250.00	1,000.00
582 · Continuing education	0.00	916.66	559.26	2,750.00	11,000.00
583 · Board and committee meetings	104.43	416.67	143.21	1,250.00	5,000.00
585 · Strategic Plan/Project Managemen	0.00	416.66	0.00	1,250.00	5,000.00
Total Staff and Board Development	500.82	1,833.33	1,120.25	5,500.00	22,000.00
Total Expense	37,292.64	54,766.06	112,010.89	164,298.26	657,193.00
Net Ordinary Income	(34,357.15)	(12,780.06)	96,121.63	36,659.74	(78,361.00)
Net Income	(34,357.15)	(12,780.06)	96,121.63	36,659.74	(78,361.00)

Finance Committee
Chair: Tony Montgomery
Homeward Board

September 3, 2024 (8:00am)

Agenda

Agenda

1. Welcome
 - Attendees: Tony Montgomery, Angie Arthur, Brian Willem, Susan Rathjen, John Maahs (Guest)
2. August 2024 Financials
 - Large income due to Polk County and Wells Fargo (restricted)
 - Modest and typical expenses
3. Minutes
 - 09/03/2024 minutes reviewed and accepted as drafted
4. Audit – Presented by John Maahs, Meriwether
 - Introduction of John Maahs and Meriwether
 - Review of Letters: Management Representation (from Homeward) and Management letter (from Auditor)
 - One issue identified under corrected and Uncorrected Misstatements
 - No disagreements with management
 - No issues identified with Internal Controls
 - Audit review
 - Opinion: Best possible
 - Notable items:
 - Change treatment of ARPA classification (from deferred to revenue to net assets with restrictions) – This is the one item identified corrected misstatements
 - Increase/decrease net assets reflects the corrected treatment of ARPA funds
 - Liquidity Footnote (#7) identifies cash at year-end, less restrictions, to show available cash
 - Next Steps
 - Finance Committee has reviewed and accepted the draft.
 - Final report will be recommended to the Board at the next meeting
5. Continuum of Care Update
 - CoC application process underway. Managing reallocations. Due at end of October
 - Received funding to pay for Matt Smith, 5-year strategic plan
 - Youth Homeless System Improvement grant recipient (along with Balance of State CoC). .5 FTE dedicated to Polk County

Next Meeting on 11/05/2024

Coordinated Services Committee
Date: September 25, 2024, 10:00 AM – 11:00 AM
Polk County River Place, Room 1A

Minutes

In attendance: Sarah High, Lori Jensen, Angie Arthur, Carrie Moreno, Tyan Smith, Catherine Gerdes, Katie Kamienski, Susan McCarragher

I. Welcome, introductions, and approve minutes

- Approval of September 2024 Minutes

II. Homeward Updates/Executive Director's Report

- Regular COC NOFO process continues.
- Homeward Board reviewed and voted on CoC Competition allocations 9/23/24.
- Next step-Des Moines City Council will vote.
- \$5,000,000 CoC Build NOFO Project grant.
 - Rental and/or new building
 - 25% match required
- Funding secured to continue 5 yr strategic planning collaboration with Matt White.
- October 2024 (likely starting) community conversations with community members, persons with lived experience, employees, politicians, etc.

III. Presentation with Sarah High, LMSW CADC, Outreach Coordinator with UCS Healthcare

- USC Health care was established in 1997.
- USC is a non-profit organization with 100+ employees.
 - 14 locations in Iowa (3 brick and mortar)
 - Largest substance use treatment provider in Iowa.
 - USC is hoping to expand to NW Iowa.
 - USC partners with other agencies to meet community needs.
- USC Mobile Unit General Information
 - Created in 2020 through the CARES Act.
 - 2022-transitioned to basic health needs screenings
 - 2023-strategic planning-harm reduction
 - 2024-service restructuring and expansion
- UCS has substance abuse assessments
 - MAT
 - Mental health assessments
 - Psychiatry
 - LGBTQ+ specialty care

-
- Harm reduction
 - Care coordination
 - UCS Substance use treatment programs
 - Intensive outpatient (9-20 hours per week)
 - Outpatient (1-4 hours per week) more flexible programming
 - UCS has OBOT-office base opioid treatment
 - MAT-medical assisted treatment
 - Naltrexone-opioid receptor blocker
 - Buprenorphine- a synthetic opioid developed in the late 1960s and is used to treat pain and opioid use disorders (OUDs).
 - Methadone- acting full opioid agonist, and a schedule II-controlled medication. Methadone used to treat those with a confirmed diagnosis of opioid use disorder (OUD) can only be dispensed through a SAMHSA certified OTP.
 - Alcohol Use Disorder
 - Naltrexone- a medication approved by the FDA to treat both opioid use disorder (OUD) and alcohol use disorder (AUD).
 - Disulfiram- used to treat chronic alcoholism. It causes unpleasant effects when even small amounts of alcohol are consumed. These effects include flushing of the face, headache, nausea, vomiting, chest pain, weakness, blurred vision, mental confusion, sweating, choking, breathing difficulty, and anxiety.
 - Acamprosate (Campral)- used to help overcome your drinking problem. It is not a cure for alcoholism, but rather will help you maintain abstinence.
 - Myths
 - Trading one addiction for another-false
 - MAT hinders recovery-false
 - Early intervention is crucial
 - The chances of overdosing increases when a person is using MAT-false
 - MAT is dangerous for pregnant women-false
 - Opioid withdrawal can cause miscarriages, still birth, etc.

V. Sharing of Community Resources

- October is DV awareness month (please see flyer)
- October 22nd-Webinar: “Sustaining a Stance of Kindness” with Sufna John, Ph.D.
 - October 22, 2024 12:00 PM

VII. Adjourn

Next meeting: October 23, 2024, 10:00-11:00 AM at Polk County River Place Room 1A

**Homeward's Director Advisory Council
Meeting Minutes**

October 1, 2024, 11am-Noon
River Place, Conference Room 3A

In Attendance: Emily Osweiler (GDMSH), Eric Kool (Polk Co CFYS), Carol Gathright (City of DSM), Lori Jensen (CFI/DVS), Melissa O'Neil (CISS), Shawn Savage (YSS/IHYC), Joy Ihle (Polk Co CFYS), Suzanne Zutter (Families Forward), Amber Lewis (City of DSM), Deirdre Henriquez (CISS), Travis Robinson (BMC), Carrie Woerdeman (HOME, Inc), Amy Croll (Homeward), Ashlan Lippert (DMPL), Jorie Hidri (PHC), Jennifer Hutchinson (Hope Ministries), Pat Schacherer (ICA), Jim Cain (Homeward), Jennifer Miner (VA), Angie Arthur (Homeward), Jodi Gjersvik (City of DSM), Brooke Pagano (CSA), Katie Kamienski (YSHC), Diane McCoy (Iowa Total Care), Nicole (Iowa Total Care), Cindy Rybolt (Iowa Legal Aid)

- I. The meeting was called to order at 11:03am by Emily Osweiler.
- II. Self-introductions
- III. There was a call for the August minutes to be approved (there was no meeting in September due to illnesses). Angie Arthur motioned, and Ashlan Lippert seconded. The minutes were approved unanimously.
- IV. Workgroup Updates
 - a. Systems Streamline- Jim Cain will schedule the next system streamline and Jorie Hidri will send notes from the last meeting regarding the overlap between aging and homelessness.
 - b. Inclusive Women's Shelter- Angie Arthur and Lori Jensen shared that they are planning to wrap this conversation into the upcoming strategic planning.
- V. Discussion
 - a. Provider Practices
 - i. There is concern amongst several providers regarding a pastor in the community that has formed a new 501c3 to "empower the homeless."
 - ii. There are at least 7 organizations that will not work with him due to alleged unethical practices.
 - iii. A small group will meet to discuss possible solutions.
 - b. Educating Clients Regarding Enforcement Changes Think Tank
 - i. Providers discussed ideas on how to have a common and clear message for clients regarding enforcement changes.
 - ii. There is still work being done with the two ordinances and they may have different start dates based on work still happening such as new outreach workers through PHC, a new DMPD officer to work as an encroachment liaison, etc
- VI. Community Updates/Concerns
 - a. The VA National office is reporting an aging population uptick. It might be good to invite Aging Resources and others to our Director Advisory Council.
 - b. Ashlan shared that there is a goal to have additional supports available at the regularly scheduled DMPL outreach project such as a judicial presence.
- VII. Meeting was adjourned at 12:06pm.

THE NEXT DIRECTOR ADVISORY COUNCIL MEETING WILL BE TUESDAY, NOVEMBER 5, 2024, FROM 11-NOON AT POLK COUNTY RIVER PLACE.

**Performance Measures Committee Meeting
Minutes – August 22, 2024
Teams Meeting Online 10:00 AM – 11:00 AM**

Attendees: Jennifer Miner, Amber Tompkins, Amy Croll, Angie Arthur, Ehren Stover-Wright, Hope Metheny, Jeremy Orcutt, Jim Cain, Jorie Hidri, KarLee Kearns, Kasperian Kittredge, Kyndra Lobdell, Melissa Oneil, Melissa Vine, Patrick Schacherer, Shawna (CFI)

Point in Time

Patrick Schacherer with ICA presented summer PIT data.

- 733 Total (Winter PIT: 715)
 - 405 – Emergency Shelter (+100 from Winter PIT)
 - 148 – Transitional Housing
 - 180 – Unsheltered (Winter PIT: 147)
- Highest count at Central Iowa Shelter & Services in years.

Community Dashboard

Kasper with ICA reviewed changes made to the Community Dashboard:

Current Dashboard:

[Iowa Simple Polk Dashboard — Institute for Community Alliances \(icalliances.org\)](https://icalliances.org)

Dashboard with Potential Edits:

[Iowa Simple Polk Dashboard - potential edits — Institute for Community Alliances \(icalliances.org\)](https://icalliances.org)

Summary of edits:

- Added # of new enrolled and how many were new to the system
- Breakout of exits. Total # of exits and how many exited into permanent housing
- Changed “clients” to “people” or “individuals”
- Added identified primary reasons for experiencing homelessness
- Add move-in date versus exits so can capture those who are still in services

Quarterly Performance Report

KarLee Karnes reviewed the Quarterly Performance Report (see attached)

Other Updates:

Patrick Schacherer (ICA) shared that HDX2 is riddled with many issues and transition from HDX to HDX2 not going well. ICA does not have ability to give competition reports currently.

September meeting cancelled due to no agenda items.



HOMeward

Strategic Partnerships Toward Ending Homelessness

Agenda for Next Meeting

- Final Summer PIT data
- Quarterly Performance Report
- OSA
- November & December Meeting Schedule
- **Next meeting: October 24, 2024 10:00-11:30**

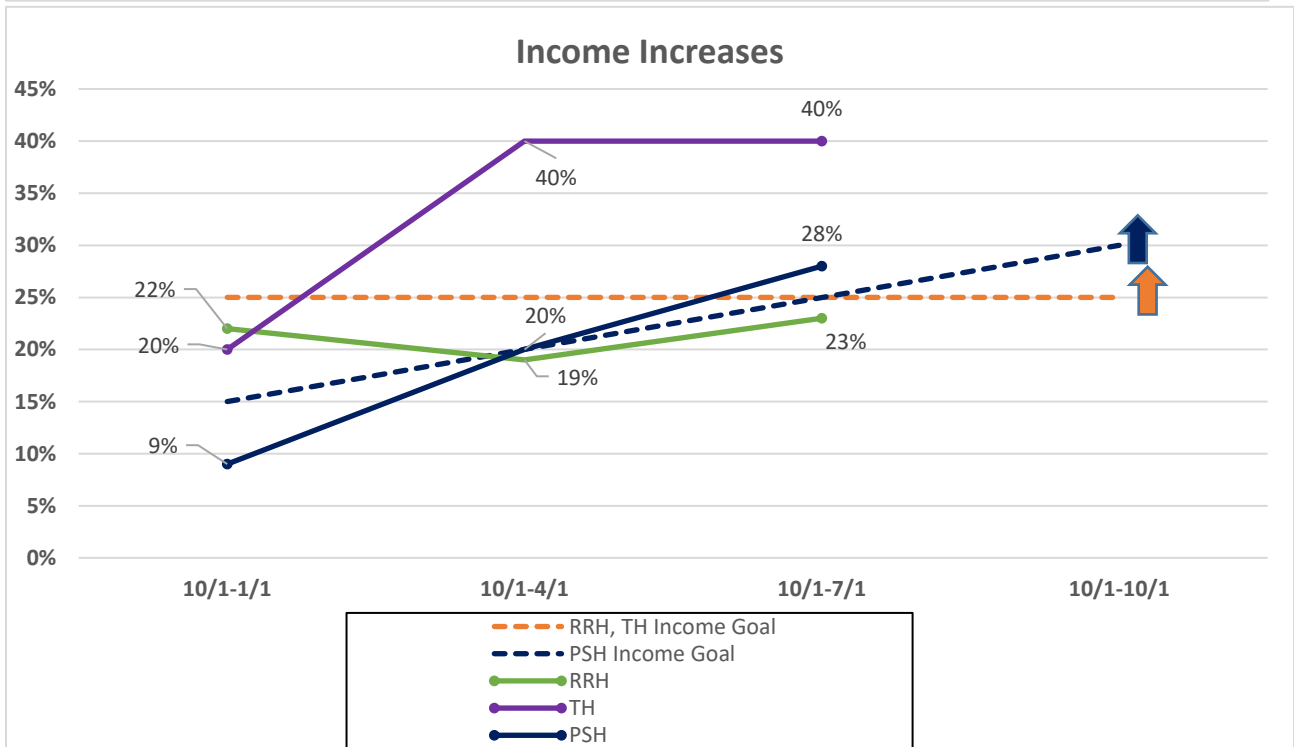
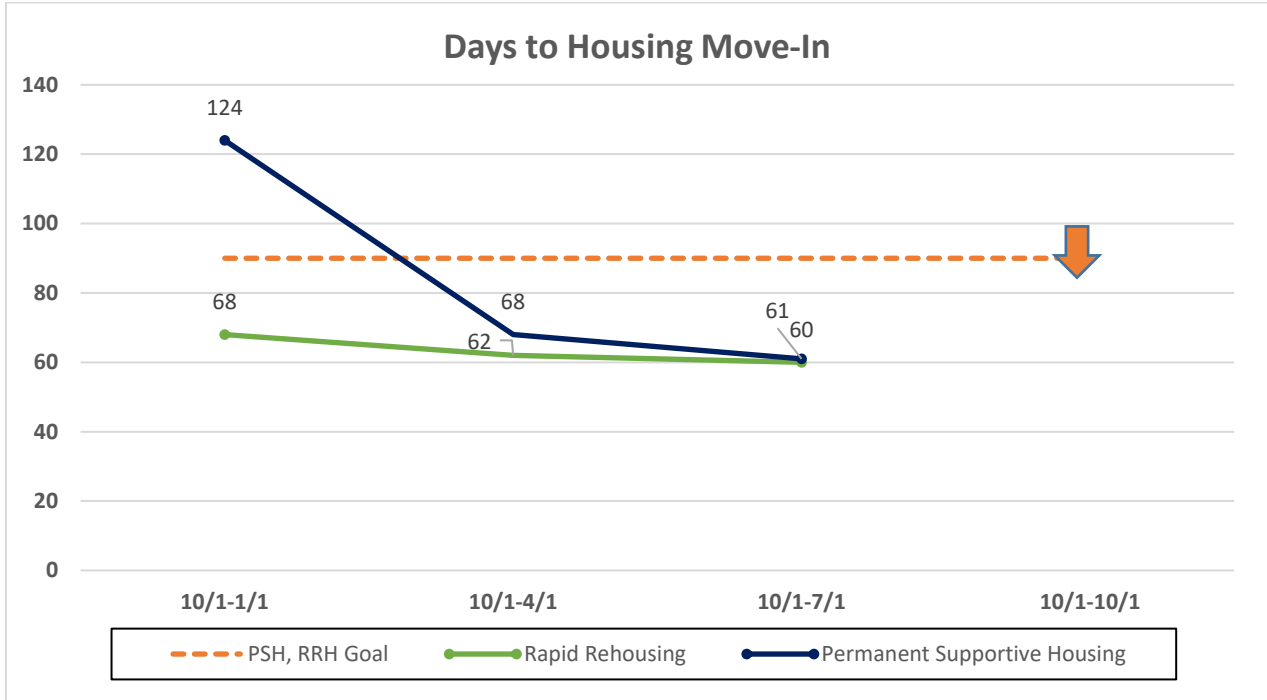


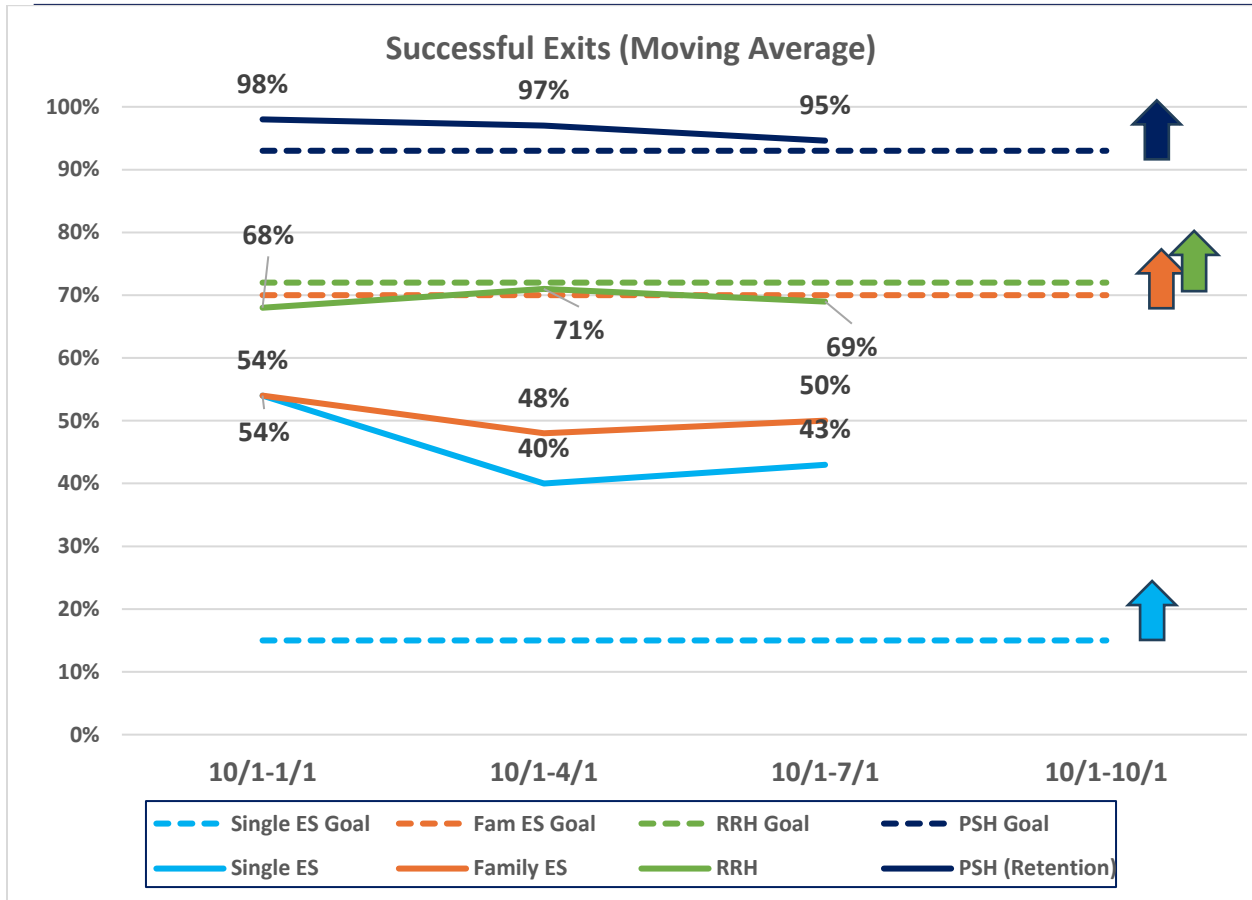


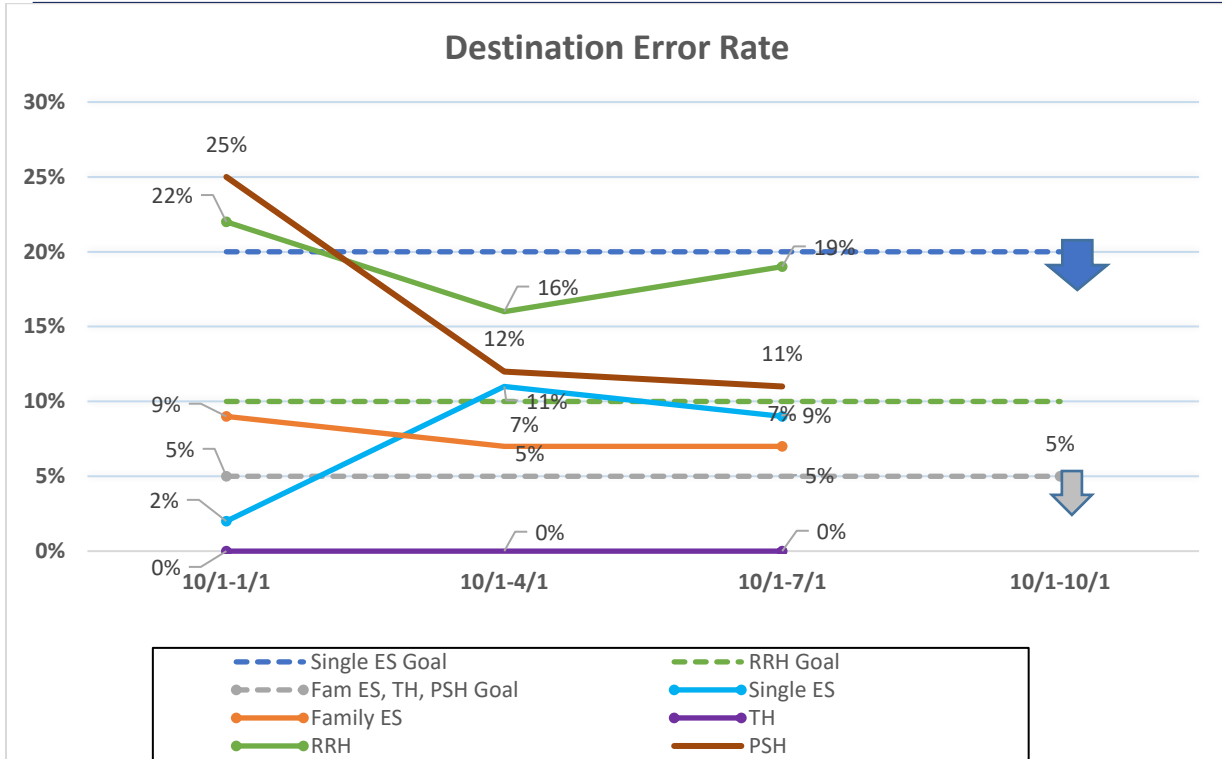
Polk County Continuum of Care Quarterly Performance Report

Report Generated 7/24/24

Reporting Periods: 10/1/2023 – 06/30/2024







OpportUNITY

HOUSING WORKGROUP MEETING

MEETING AGENDA



DATE: Monday, October 21, 2024

TIME: 1:00-2:00 PM

LOCATION: Virtual Zoom

TIME	ITEM	PRESENTER
1:00-1:05	Welcome	Rachel Ong - Habitat for Humanity Angie Arthur - Homeward
1:05-1:35	Capital Crossroads: Workforce Housing	Kaity Patchett, Capital Crossroads
1:35-1:45	Homelessness Update	Angie Arthur - Homeward
1:45-2:00	Community Updates	All

Next Housing Work Group Meeting: Monday, November 18, 2024 from 1:00-2:00PM

Notes:

Kaity provided a high-level overview of the Capital Crossroads and their roadmap. When it comes to workforce housing there are three main areas of focus:

- Regional counting and preservation of units
- Zoning and land use reforms
- Economic development incentives

Angie provided a brief update about homelessness issues.

- Ordinances have not gone into effect. There are different processes that need to be put into place before they can go into effect. They may not go into effect at the same time if pieces fall into place at different rates.
- Homewards NOFO will be released soon and on the website if you would like to view it.
- Angie asked the group about any experiences with landlords allowing payments only via online portal and if there have been issues. There were multiple organization represented that had experienced this.
 - o Dave shared with the group that platforms are being sold to landlords as a way for renters to boost credit scores through on-time rental history.

OpportUNITY is a collective impact initiative fighting to reduce poverty and eliminate barriers that prevent central lowans in Dallas, Polk, and Warren Counties from thriving.

OpportUNITY

HOUSING WORKGROUP MEETING

MEETING AGENDA



DATE: Monday, October 21, 2024

TIME: 1:00-2:00 PM

LOCATION: Virtual Zoom

Community Updates:

- Public comment is open on the Analysis of Impediments to Fair Housing. This will be presented to City Council on November 4th. More information can be found [here](#).
- UpLift will be hosting another community conversation October 29th at 11am. Roadblock!: Navigating the Benefits Cliff for Social Security Disability Benefits will be held virtually. [Register here](#).
- The OpportUNITY re-entry workgroup will be co-hosting another community resource fair November 13th from 10am-1pm. This event will offer day of services such as resume support, job search assistance, and IDs from the DOT. More information will be shared as the event approaches.
- United Way has been working with community organizations to create a community led, comprehensive plan to reduce youth violence. We are finalizing details and will be hosting a roll-out event November 18th, from 4pm-5:30pm at the Varsity Theater. We hope you can join us!
- Drake University's College of Pharmacy and Health Sciences seeks volunteers for its annual Poverty Simulation, with sessions offered November 19, 21, and 22. All shifts are 12:30-3:00pm in Levitt Hall, located in Old Main (2507 University Ave). If you have experience serving low-income individuals, your participation and perspective would be greatly appreciated at one, two, or all three shifts. Participants are health science students from Drake, DMACC, Grandview, and Mercy.

Please email Mallery Allen at mallery.allen@drake.edu to sign up for a shift, or register here: <https://givepul.se/foow7n> You will receive further instructions via email and have a chance to meet with Mallery beforehand if you have questions.

OpportUNITY is a collective impact initiative fighting to reduce poverty and eliminate barriers that prevent central Iowans in Dallas, Polk, and Warren Counties from thriving.

CE Household Report: 01/01/2024-08/31/2024

Region: Not selected

Provider(s): Not selected

Intakes completed (EE)

CE Project (EE)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PHC - Coordinated Intake(1184)	137	119	138	165	173	150	131	133					1,145
PHC - Coordinated Intake (Post-Shelter Admission)(1185)	45	47	43	32	43	40	31	46					327
TOTAL	182	166	181	197	216	190	162	179					1,472

Assessments completed (CE Assessment)

Assessment Level	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Crisis Needs Assessment	2	1											3
Housing Needs Assessment	166	162	176	189	209	181	159	167					1,387
TOTAL	168	163	176	189	209	181	159	167					1,388

Prioritization Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Not Placed on Prioritization List	30	24	36	42	29	30	36	38					264
Placed on Prioritization List	138	139	140	147	180	151	123	129					1,130

SPDAT Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client Refused (0 Score)	15	6	16	17	11	10	21	22					118
Family (v2.0)		1			1	1		3					6
Family (v3.0)	34	30	30	52	62	52	42	44					340
HP Assessment (BOS ONLY)		1											1
Single (v2.0)	9	3	1	3	3	3	3						25
Single (v3.0)	97	108	116	101	107	103	85	85					793
Youth (v1.0)								1					1
Youth (v2.0)	13	14	13	16	25	12	8	12					111

SPDAT Score / Need	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PSH - Permanent Supportive Housing (8+)	83	86	85	106	129	117	108	103					806
RRH - Rapid Rehousing (4-7)	64	67	74	61	67	54	29	39					448
HP - Homelessness Prevention													
Diversion - No supports (0-3)	21	10	17	22	13	10	22	25					140

Removed from Prioritization List

Housing Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Housed	11	8	13	14	18	13	15	21					113
Not Housed	26	23	35	82	62	94	90	82					489
Average days to permanent housing	55	24	37	34	60	36	24	24					37
Average days on prioritization list	34	78	43	67	65	92	73	72					71

Project type used (Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Homeless Prevention (HP)					1								1
Other Permanent Housing (OPH)	5	4	6	7	9	12	11	16					70
Permanent Supportive Housing (PSH)	1	1	2	3	2	1							10
Rapid Rehousing (RRH)	4	2	5	4	5		3	1					24
Transitional Housing (TH)		1						2					3
NULL	1				1		1	2					5

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client/Household cannot be found or contacted.	10	6	10	51	23	44	31	42					212
Client/Household needs to be re-assessed.					1		1						2
Client/Household no longer wishes to participate in Coordinated Intake	1	1	1	3	1	3							10
Client/Household self-resolved and is no longer homeless	3	1	2	1	5	4	2	2					20
Client is now deceased.				1		1							2

CE Household Report: 01/01/2024-08/31/2024

Region: Not selected

Provider(s): Not selected

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client is now in a substance abuse treatment facility or			1										1
Client is now in jail/prison/juvenile detention facility.				2		1	1						4
NULL	12	15	21	24	32	41	55	38					238

CE Household Report: 01/01/2024-08/31/2024 (Single Individuals)

Region: Not selected

Intakes completed (EE)

CE Project (EE)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PHC - Coordinated Intake(1184)	79	80	97	99	96	84	74	75					684
PHC - Coordinated Intake (Post-Shelter Admission)(1185)	42	43	42	30	37	34	29	41					298
TOTAL	121	123	139	129	133	118	103	116					982

Assessments completed (CE Assessment)

Assessment Level	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Crisis Needs Assessment	1	0											1
Housing Needs Assessment	117	121	133	122	132	112	104	110					941
TOTAL	118	121	133	122	132	112	104	110					942

Prioritization Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Not Placed on Prioritization List	20	13	25	23	13	15	20	25					154
Placed on Prioritization List	98	108	108	99	119	97	84	85					788

SPDAT Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client Refused (0 Score)	10	5	13	11	6	6	18	20					89
Family (v2.0)		0			0	0		0					0
Family (v3.0)	0	0	0	1	2	2	0	0					5
HP Assessment (BOS ONLY)		0											0
Single (v2.0)	9	2	1	2	3	3	2						22
Single (v3.0)	88	102	108	94	100	93	76	77					730
Youth (v1.0)								1					1
Youth (v2.0)	11	12	11	14	21	8	8	12					97

SPDAT Score / Need	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PSH - Permanent Supportive Housing (8+)	53	59	58	53	70	62	63	56					471
RRH - Rapid Rehousing (4-7)	50	55	61	53	54	44	22	31					364
HP - Homelessness Prevention													
Diversion - No supports (0-3)	15	7	14	16	8	6	19	23					108

Removed from Prioritization List

Housing Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Housed	8	4	11	9	10	10	11	15					78
Not Housed	14	14	21	53	35	54	53	36					277
Average days to permanent housing	83	22	31	39	77	43	52	60					53
Average days on prioritization list	43	158	83	87	87	131	113	110					105

Project type used (Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Homeless Prevention (HP)					0								0
Other Permanent Housing (OPH)	3	3	5	5	7	10	9	13					55
Permanent Supportive Housing (PSH)	1	0	2	2	2	0							7
Rapid Rehousing (RRH)	3	1	4	2	1		2	0					13
Transitional Housing (TH)		0						1					1
NULL	1				0		0	1					2

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client/Household cannot be found or contacted.	4	4	7	33	12	28	14	11					110
Client/Household needs to be re-assessed.					0		1						1
Client/Household no longer wishes to participate in Co	1	1	1	3	1	3							10
Client/Household self-resolved and is no longer homele	1	0	0	0	3	2	2	2					10
Client is now deceased.				1		1							2
Client is now in a substance abuse treatment facility or			1										1
Client is now in jail/prison/juvenile detention facility.				1		1	0						2

CE Household Report: 01/01/2024-08/31/2024 (Single Individuals)

Region: Not selected

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
NULL	8	9	12	15	19	19	36	23					141

CE Household Report: 01/01/2024-08/31/2024 (Family Household)

Region: Not selected

Intakes completed (EE)

CE Project (EE)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PHC - Coordinated Intake(1184)	58	39	41	66	77	67	57	58					463
PHC - Coordinated Intake (Post-Shelter Admission)(1185)	3	4	1	2	6	6	2	5					29
TOTAL	61	43	42	68	83	73	59	63					492

Assessments completed (CE Assessment)

Assessment Level	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Crisis Needs Assessment	1	0											1
Housing Needs Assessment	49	41	43	67	77	69	55	57					450
TOTAL	50	41	43	67	77	69	55	57					450

Prioritization Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Not Placed on Prioritization List	10	11	11	19	16	15	16	13					110
Placed on Prioritization List	40	30	32	48	61	54	39	44					344

SPDAT Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client Refused (0 Score)	5	1	3	6	5	4	3	2					29
Family (v2.0)		1			1	1		3					6
Family (v3.0)	34	30	30	51	60	50	42	44					335
HP Assessment (BOS ONLY)		1											1
Single (v2.0)	0	1	0	1	0	0	1						3
Single (v3.0)	9	5	8	7	7	10	9	8					62
Youth (v1.0)								0					0
Youth (v2.0)	2	2	2	2	4	4	0	0					14

SPDAT Score / Need	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PSH - Permanent Supportive Housing (8+)	30	26	27	53	59	55	45	47					335
RRH - Rapid Rehousing (4-7)	14	12	13	8	13	10	7	8					84
HP - Homelessness Prevention													
Diversion - No supports (0-3)	6	3	3	6	5	4	3	2					32

Removed from Prioritization List

Housing Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Housed	3	4	2	5	8	3	4	6					35
Not Housed	12	9	14	29	27	40	37	46					212
Average days to permanent housing													
Average days on prioritization list		0				0		0					0

Project type used (Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Homeless Prevention (HP)					1								1
Other Permanent Housing (OPH)	2	1	1	2	2	2	2	3					15
Permanent Supportive Housing (PSH)	0	1	0	1	0	1							3
Rapid Rehousing (RRH)	1	1	1	2	4		1	1					11
Transitional Housing (TH)		1						1					2
NULL	0				1		1	1					3

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client/Household cannot be found or contacted.	6	2	3	18	11	16	17	31					102
Client/Household needs to be re-assessed.					1		0						1
Client/Household no longer wishes to participate in Co	0	0	0	0	0	0							0
Client/Household self-resolved and is no longer homele	2	1	2	1	2	2	0	0					10
Client is now deceased.				0		0							0
Client is now in a substance abuse treatment facility or			0										0
Client is now in jail/prison/juvenile detention facility.				1		0	1						2

CE Household Report: 01/01/2024-08/31/2024 (Family Household)

Region: Not selected

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
NULL	4	6	9	9	13	22	19	15					97

CE Household Report: 01/01/2024-08/31/2024 (Youth Subset - 18 to 24)

Region: Not selected

Intakes completed (EE)

CE Project (EE)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PHC - Coordinated Intake(1184)	14	15	12	27	30	15	14	15					142
PHC - Coordinated Intake (Post-Shelter Admission)(1185)	4	5	5	4	8	4	4	7					41
TOTAL	18	20	17	31	38	19	18	22					183

Assessments completed (CE Assessment)

Assessment Level	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Crisis Needs Assessment	0	0											0
Housing Needs Assessment	14	16	14	25	37	19	18	20					160
TOTAL	14	16	14	25	37	19	18	20					160

Prioritization Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Not Placed on Prioritization List	1	3	4	9	7	2	3	5					34
Placed on Prioritization List	13	13	10	16	30	17	15	15					128

SPDAT Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client Refused (0 Score)	0	0	0	2	1	1	1	2					7
Family (v2.0)		0			0	0		0					0
Family (v3.0)	4	3	3	8	10	5	7	4					43
HP Assessment (BOS ONLY)		0											0
Single (v2.0)	0	0	0	0	0	0	0						0
Single (v3.0)	0	0	0	0	1	1	2	1					5
Youth (v1.0)								1					1
Youth (v2.0)	10	13	11	15	25	12	8	12					104

SPDAT Score / Need	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
PSH - Permanent Supportive Housing (8+)	7	10	7	15	19	14	13	9					93
RRH - Rapid Rehousing (4-7)	7	6	7	6	16	4	4	8					57
HP - Homelessness Prevention													
Diversion - No supports (0-3)	0	0	0	4	2	1	1	3					11

Removed from Prioritization List

Housing Status	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Housed	0	1	2	4	3	2	2	5					19
Not Housed	0	1	3	11	15	18	30	28					105
Average days to permanent housing		15	30	51	58	10	4	25					31.84
Average days on prioritization list		7	6	43	74	67	91	73					71

Project type used (Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Homeless Prevention (HP)					0								0
Other Permanent Housing (OPH)	0	0	0	2	1	1	0	3					7
Permanent Supportive Housing (PSH)	0	0	2	2	1	1							6
Rapid Rehousing (RRH)	0	0	0	0	1		1	0					2
Transitional Housing (TH)		1						2					3
NULL	0				0		1	0					1

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
Client/Household cannot be found or contacted.	0	0	0	4	8	6	15	15					47
Client/Household needs to be re-assessed.					1		0						1
Client/Household no longer wishes to participate in Co	0	0	0	2	1	3							6
Client/Household self-resolved and is no longer homele	0	0	0	0	1	1	2	2					6
Client is now deceased.				0		0							0
Client is now in a substance abuse treatment facility or			0										0
Client is now in jail/prison/juvenile detention facility.				0		1	1						2

CE Household Report: 01/01/2024-08/31/2024 (Youth Subset - 18 to 24)

Region: Not selected

Reason for removal (Not Housed)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	YTD
NULL	0	1	3	5	4	7	12	11					43



Homeward
Board Meeting
November 12, 2024

Topic: Homeward Internal Revenue Service Form 990 Filing

Background: As Homeward no longer utilizes a fiscal agent, the organization completed its first independent audit by Meriwether Wilson and Company, PLLC which was approved by the Homeward Board on October 14, 2024. Using Homeward's audit financials, Tarbell & Company LLC completed the IRS Form 990. The Homeward Board has received the internal and public Form 990s for review and approval. After approval by the Homeward Board is received, Tarbell will submit Homeward's Form 990 to the Internal Revenue Service.

Recommendation: The Finance Committee recommends approval of the Form 990 for submission to the IRS.



November 12, 2024

Sherri L. Boyd
U.S. Department of Housing and Urban Development
Community Planning and Development Office
451 7th Street S.W.
Washington, DC 20410

Dear Ms. Boyd,

I am writing in support of the City of Des Moines project application for the CoC Builds Notice of Funding Opportunity. The City of Des Moines will be partnering with Greater Des Moines Supportive Housing (GDMSH) in converting a former Holiday Inn into 160 new units of permanent supportive housing to meet the housing needs of some of our most vulnerable community members. Twenty-five percent (40) of the PSH units will be for people experiencing homelessness. The rehabilitation costs associated with creating 26 of those 40 units are included in the City of Des Moines' request for the \$5 million available to the DSM/Polk County IA-502 Continuum of Care through the CoC Builds NOFO.

Homeward serves as Polk County's homelessness planning organization, forging strategic partnerships between homelessness organizations, community partners, government officials, and people experiencing homelessness. Our work is to ensure that Polk County residents rarely experience homelessness at all and that their stay in homelessness is a brief, one-time experience when it does occur. The project to create permanent supportive housing helps address a significant gap of 533 permanent supportive housing units identified in the January 2024 Gap Analysis of the homeless system in Polk County.

GDMSH's approach will help our community add needed permanent housing plus supportive services for some of our most vulnerable, including those experiencing homelessness and those who are extremely low income. The program is prioritizing approximately 25% of total units to serve Centralized Intake clients—this means vital housing for some of our most chronically homeless as recent studies confirm the dire need for more affordable and supportive housing units in our community. GDMSH has developed a comprehensive slate of supportive services based upon evidence-based practices to assist the residents in becoming housing stable.

Although a new organization, this team has extensive knowledge of homelessness issues, affordable housing needs, financing strategies, and the necessary supportive services to assist vulnerable individuals to become housing stable. This housing model promises to foster innovation and strengthen our community's housing network.

Sincerely,

Annie Uetz, Board Chair
Homeward