Executive Summary

Background

The 2020 HUD Annual Homeless Assessment Report to Congress, which aggregates Point-in-Time (PIT) Counts from across the nation, estimated that on any given night, over 160,000 people were experiencing homelessness in California, the majority (70 percent) unsheltered.[1] California had the third-highest homelessness rate relative to its population, behind New York and Hawaii, and the highest total number of people experiencing homelessness.

Addressing this humanitarian crisis is a key priority for the state. ***Since 2018, California has committed unprecedented levels of funding to prevent and end homelessness.*** Between the three-year study period of Fiscal Years 2018–19 and 2020–21, the state directed $9.6 billion in homelessness-focused programs, encompassing 35 programs administered by nine state agencies or departments, all aimed at expanding access to housing, health, and social services for people experiencing or at risk of homelessness.

Recognizing the need to better understand the implementation of these programs, Assembly Bill No. 140 (Chapter 111, Statutes of 2021), hereafter AB 140, was enacted into law. The legislation requires the California Interagency Council on Homelessness (Cal ICH) to conduct a comprehensive assessment of state-administered programs that serve people experiencing or at risk of homelessness, with the purpose of analyzing program funding, populations served, and the resulting outcomes for the people served. Cal ICH partnered with researchers at UC Berkeley, UC San Francisco, and Abt Associates to undertake the Statewide Homelessness Landscape Assessment (Landscape Assessment) required by Welfare and Institutions Code 8257.1 and 8257.2.

This report presents quantitative findings from the Landscape Assessment covered through the study's three-year reporting period of July 1, 2018 through June 30, 2021. Specifically, the report focuses on answering five questions detailed in AB 140:

- **How were state funds used?** The report presents fiscal information for 35 state-administered programs designed to address homelessness, hereafter referred to as the Landscape Assessment programs, showing how much funding was allocated and for what purposes.[2]

- **Who was served by Landscape Assessment programs?** The report presents data on the demographic characteristics of people served by these programs, including their age, race/ethnicity, and gender. It also presents data on subpopulations, such as veterans, children unaccompanied by adults, and people experiencing chronic

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[1] Meghan Henry et al. "The 2020 Annual Homeless Assessment Report (AHAR) to Congress." The U.S. Department of Housing and Urban Development.
https://www.huduser.gov/portal/sites/default/files/pdf/2020-AHAR-Part-1.pdf

[2] This section responds to Welfare and Institutions Code §§ 8257.1(a)(1)(A)(i)–(v).

homelessness.[3] The report also highlights racial and ethnic disparities in homelessness and outcomes. [4]

- **What types of services were provided, and how did people navigate those services?** The report details the types of services that were provided to people at risk of or experiencing homelessness.[5]

- **How much housing—both temporary and permanent—was created?** The report documents the impact of efforts to expand interim and permanent housing options.[6]

- **What were the outcomes for people who received assistance?** The report presents data on observed outcomes for people in programs as of June 30, 2021, including how many people transitioned to permanent housing after enrolling in services, as well as what share remained or returned to homelessness.[7]

The analysis draws on a variety of quantitative data sources, most notably Cal ICH's Homeless Data Integration System (HDIS). HDIS synthesizes locally reported information from Homeless Management Information Systems (HMIS) that are maintained by all Continuums of Care (CoCs). Cal ICH created HDIS in 2021 to improve statewide data collection and policy coordination. However, HDIS does not include data on every state-funded program. This report supplements HDIS data with quantifiable fiscal and programmatic data collected from state agencies and programs.

There are several important caveats to note. First, the report covers select programs and outcomes between July 1, 2018, and June 30, 2021, the three-year study period. This period includes the height of the COVID-19 pandemic, which profoundly impacted efforts to address homelessness. On the one hand, the COVID-19 pandemic heightened the urgency to respond to the crisis, and led to a large increase in federal resources, which the state leveraged to rapidly stand-up innovative programs such as Project Roomkey and Homekey. On the other hand, the pandemic also contributed to challenges in delivering assistance, particularly as lockdowns made it more difficult to reach and interact with people experiencing homelessness and as organizations across the state grappled with how to adjust to an altered service environment. Second, the report does not address policies or programs initiated or funded after June 30, 2021.

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[3] This section responds to Welfare and Institutions Code §§ 8257.1(a)(1)(C)(i)–(vi) and Welfare and Institutions Code §§ 8257.1(a)(1)(D)(i) as it relates to population served.

[4] This section responds to Welfare and Institutions Code §§ 8257.1(a)(1)(C)(i)–(vi) as it relates to disparities among subpopulations relative to the general population.

[5] This section responds to Welfare and Institutions Code §§ 8257.1(a)(1)(D)(i)–(v), (vii) as it relates to the type of services utilized, duration, and frequency disaggregated by demographic characteristics.

[6] This section responds to Welfare and Institutions Code §§ 8257.1(a)(1)(B)(i)–(iii) as it relates to permanent housing, rental subsidies, and emergency shelter beds made available.

[7] This section responds to Welfare and Institutions Code §§ 8257.1(a)(1)(D)(iii)–(vi), (viii) as it relates to services associated with exits from homelessness, the results of housing programs, and the number of individuals whose homelessness was prevented.

Several of the Landscape Assessment programs are ongoing and/or have seen additional rounds of funding beyond what is documented in this report based on the three-year study period. Third, as described above, HDIS does not include all services, shelter, and housing provided in California. AB 977, passed in September 2021 and effective after January 1, 2023, expands the list of programs that require additional grantees to enter data into HMIS.[8]

The report points to two important trends. First, local programs across the state are helping an increasing number of people experiencing homelessness access services and housing. Between July 1, 2018 and June 30, 2021, 571,246 unique people across California were enrolled in homelessness services, shelter, and housing programs reported in HDIS. The number of people served by homelessness interventions, including people receiving homelessness prevention services and formerly-homeless people who exited homelessness to permanent housing, reported in HDIS increased over time, from 272,583 in Fiscal Year 2018–19 to 331,825 in Fiscal Year 2020–21. Second, state-administered funds are increasing the number of people who are being helped. During the reporting period, more than 273,000 people were served by projects supported at least in part by state-administered Landscape Assessment Programs, comprising 48 percent of the total population served. The Landscape Assessment also provides important insights into who is experiencing homelessness, what types of assistance they are receiving, and how many of them are successfully exiting homelessness into permanent housing. These data and findings are aimed to help inform policy efforts to prevent and address homelessness across California.

Report Findings

This section highlights the main findings from the report, focusing on the statutory questions outlined in AB 140.

Racial Disparities in Homelessness

Cal ICH's Action Plan for Preventing and Ending Homelessness in California explicitly emphasizes racial equity and the importance of understanding racial and ethnic disparities in homelessness.[9] **Black, Indigenous and People of Color comprise a disproportionate share of the population experiencing homelessness.** In 2020, Black people comprise 5.8 percent of California's overall population, but 30.7 percent of people experiencing homelessness. The share of Black people experiencing homelessness was 5.3 times greater than their share of the state's overall population. The share of American Indian, Alaska Native, or Indigenous people experiencing

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[8] California Legislative Information. "AB 977 Homelessness program data reporting: Homeless Management Information System." September 29, 2021.
https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202120220AB977

[9] Cal ICH. "Action Plan for Preventing and Ending Homelessness in California." Updated September 2022. https://bcsh.ca.gov/calich/documents/action_plan.pdf

homelessness was 5.0 times greater than their share of the state's overall population, and the share of Native Hawaiians and Pacific Islanders experiencing homelessness was 2.8 times greater. Although people identifying as Hispanic/Latinx were less likely to experience homelessness relative to their share of the population, research has shown that they are often underestimated in homeless counts, are more likely to live in overcrowded conditions (e.g., doubling up), and tend to use public services at lower rates than other racial and ethnic groups.

Figure ES.1: Percent Change in the Number of People Experiencing Homelessness in California, 2015–2020, by Race/Ethnicity
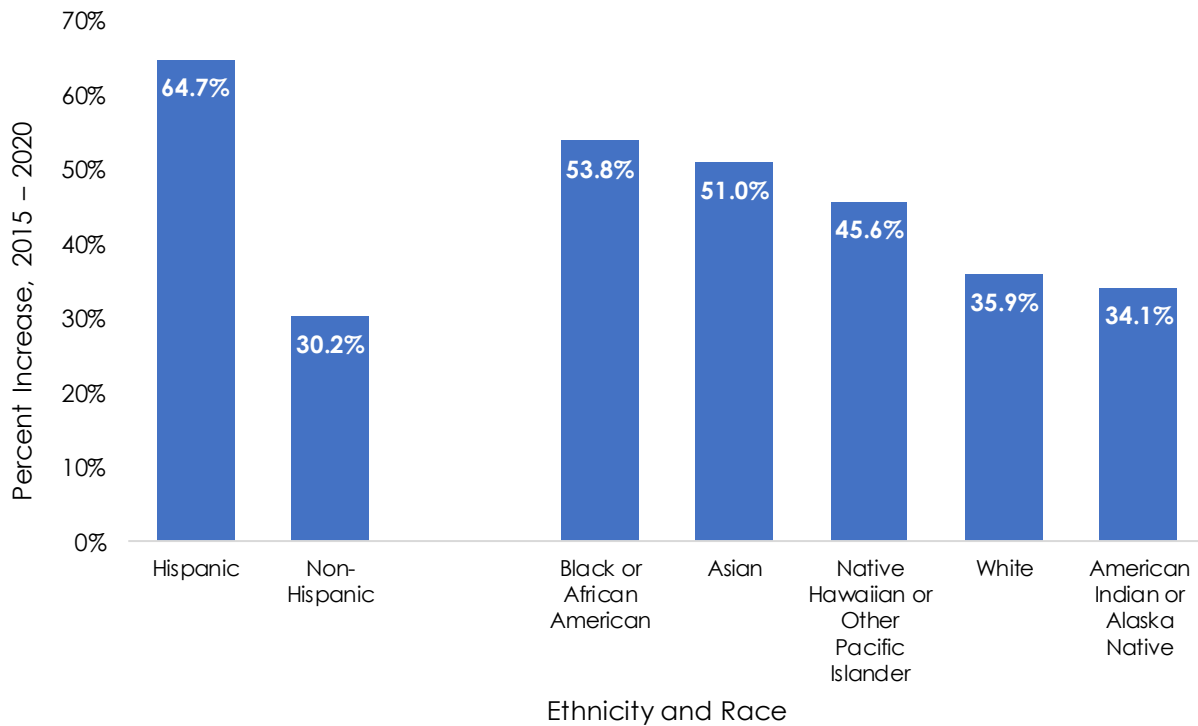
Source: HUD Point in Time Counts, 2015–2020.

Rates of homelessness have also been increasing faster for People of Color, as shown in Figure ES.1. Between 2015 and 2020, the number of Hispanic/Latinx Californians experiencing homelessness increased by 64.7 percent, and for Black Californians, it increased by 53.8 percent—both much greater than the increase of 40.1 percent in the overall homeless population in California. These trends are mirrored at the national level. Increases were also relatively large for Asians and Native Hawaiians or Pacific Islanders.[10][11]

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[10] Analysis of HUD Point-in-Time Count data from 2015 to 2020.

[11] Jeffrey Olivet et al., "Racial Inequity and Homelessness: Findings from the SPARC Study," *The ANNALS of the American Academy of Political and Social Science* 693, no. 1 (January 1, 2021): 82–100, https://doi.org/10.1177/0002716221991040; Matthew Z. Fowle, "Racialized Homelessness: A Review of

Fiscal Analysis

In recent years, the state has expanded its role in addressing homelessness by investing in new programs designed to expand the system's capacity to provide housing and services across the state's diverse communities. **Between Fiscal Years 2018–19 and 2020–21, California directed $9.6 billion in programs aimed at expanding the supply of affordable housing and providing housing and services to people experiencing homelessness.**

- Over $5.5 billion of the total $9.6 billion of funding allocated to Landscape Assessment programs were targeted at expanding the supply of affordable housing, including more units dedicated to people experiencing homelessness.[12]

- The Homeless Emergency Aid Program (HEAP) and the Homeless Housing, Assistance and Prevention (HHAP) program provided $1.2 billion in funding over the reporting period. These programs provided flexible, multi-year grant funding to localities, extending the ability of local providers to offer a wide range of services, including homelessness prevention, case management, supportive services, emergency shelter, and investments in institutional capacity like data management systems.

- Just over $1 billion went to support the 25 Whole Person Care pilot programs across the state.[13] The primary goal of Whole Person Care was to strengthen the coordination of health, behavioral health, and social services to improve outcomes for Medi-Cal high-risk beneficiaries whose complex needs often result in frequent or avoidable use of crisis or inpatient services in hospitals or other settings.

- The COVID-19 pandemic led to an expansion of resources (from both the state and federal governments) to protect people experiencing homelessness and reduce the spread of COVID-19, including Project Roomkey, Homekey, and the COVID-19 Emergency Grant Fund.[14]

- Importantly, counties had the option of pairing or augmenting certain programs identified in this assessment with an estimated total of $17.3 billion between 2018-19 and 2020-21 in funding from Realignment, MHSA, and behavioral health-related federal block grants. Counties could also leverage additional Medi-Cal

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Historical and Contemporary Causes of Racial Disparities in Homelessness," *Housing Policy Debate*, March 30, 2022, 1–28, https://doi.org/10.1080/10511482.2022.2026995.

[12] These programs include the Low-Income Housing Tax Credit (LIHTC), No Place Like Home (NPLH), the Multifamily Housing Program (MHP), Homekey, the Veterans Housing and Homelessness Prevention Program (VHHP), Housing for a Healthy California (HHC) (Article I and II), the Supportive Housing Multifamily Housing Program (SHMHP), and the Special Needs Housing Program (SNHP).

[13] Whole Person Care Pilots were launched in 2016 and continued through 2021. They were supported by federal funding through a 5-year Medicaid waiver proposed by the State of California and approved by the federal Centers for Medicare and Medicaid Services (CMS).

[14] In 2020, the state allocated $100 million in emergency funding from SB 89 to local governments to provide shelter and immediate housing options for people experiencing homelessness.

funding. As of August 2022, it is estimated that counties could leverage over $11 billion annually via public community behavioral health funding to pair or augment certain programs identified in this assessment. The scope of this assessment focuses on three fiscal years (July 1, 2018 – June 30, 2021), during which time California invested $9.6 billion and these funds were part of a $15.3 billion multi-year investment that carried forward into 2021-2022.

Population Served

Between July 2018 and June 2021, **571,246 unique people across California were enrolled in homelessness services, shelter, and housing programs reported in HDIS.** The number of people served by homelessness interventions, including people receiving homelessness prevention services and formerly-homeless people who exited homelessness to permanent housing, reported in HDIS increased over time, from 272,583 in Fiscal Year 2018–19 to 331,825 in Fiscal Year 2020–21, shown in Figure ES.2.

Figure ES.2: Number of Unique People Served by Homelessness Interventions Recorded in HDIS by Fiscal Year
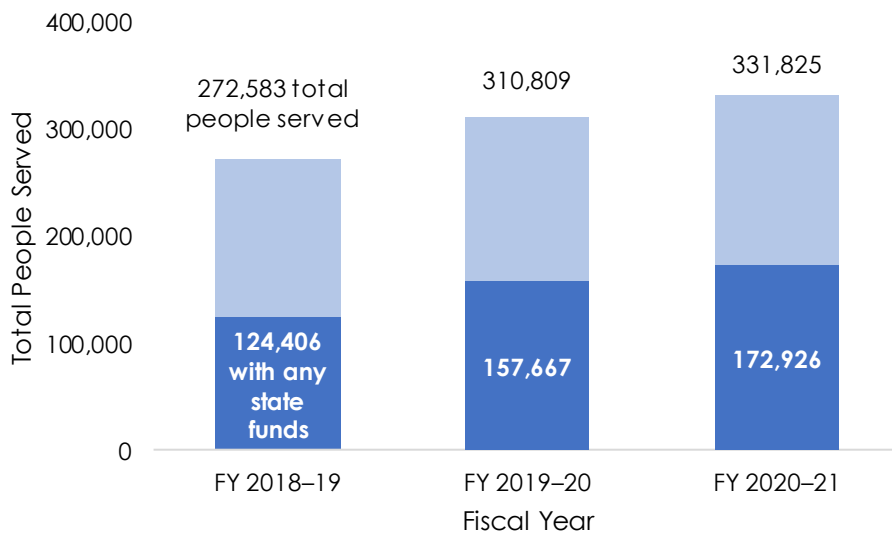
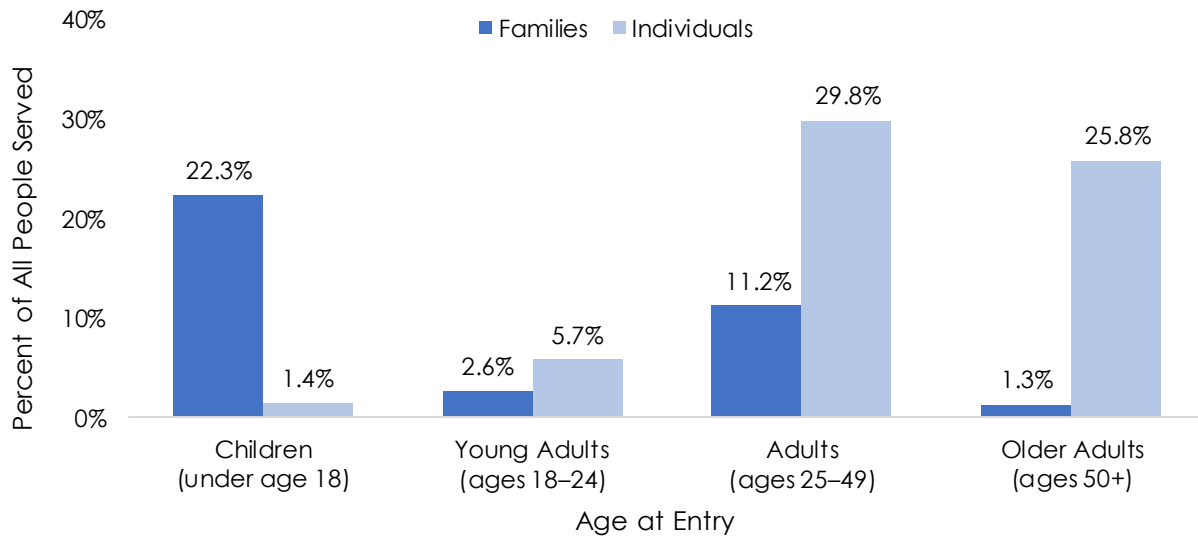*Source: Cal ICH Homeless Data Integration System*

Note: *The dark blue bars show the numbers of people served by projects with identified funding from Landscape Assessment programs. Because people's enrollments in programs can span multiple fiscal years, the total for the three fiscal years is higher than the total count of unduplicated people represented in HDIS (571,246).*

During the reporting period, more than 273,000 people were served by projects funded at least in part by a Landscape Assessment program, comprising approximately 48 percent of the total population served. The number of people served by programs with state funding also increased over time (Figure ES.1.2), from approximately 125,000 in Fiscal Year 2018–19 to almost 173,000 in Fiscal Year 2020–21. These data likely underestimate the reach of state investments, because

not all grantees of Landscape Assessment programs are required to enter data into HDIS, and not all projects in HDIS include information about funding sources.[15] Additionally, there is a lag between the time housing production is funded and when buildings open and clients are recorded being served in HDIS. Nevertheless, the data shows that Landscape Assessment programs, braided together with local, federal, and private sources of funding, expanded assistance for people experiencing homelessness across the state over the years included in the reporting period. Future research with HDIS data will be able to assess long-term trends against the baseline established in this report.

The majority of people (55.6 percent) served by programs reporting data to HDIS were individual adults over the age 25. However, Figure ES.3 shows that almost one-in-four people served—approximately 130,000 people—were children under the age of 18, the majority of them in families. Approximately six percent of people served, or 31,516 individuals, were unaccompanied young adults.

Figure ES.3: Percent of People Served by Homelessness Interventions Recorded in HDIS by Age and Household Status

Source: Cal ICH Homeless Data Integration System

As a result of racial disparities in homelessness, Black people are over-represented in programs reporting to HDIS compared to their share of California's overall population. Approximately 28 percent of people in programs during the reporting period were Black or African American, 28 percent were White Non-Hispanic/Non-Latinx, and 28 percent were White Hispanic/Latinx. American Native, Alaska Native, or Indigenous people (2.7 percent) and Native Hawaiian or Pacific Islanders (1.2 percent) were also

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[15] Of the 35 programs included in the Landscape Assessment, 16 required grantees to report information in HDIS. AB 977 (Chapter 397, Statutes of 2021), operative January 1, 2023, expanded the list of specified programs that require grantees to enter data into their local HMIS.

present in HDIS data at a greater share than in California's overall population. Asian or Asian American people (2.2 percent) and multiracial people (4.2 percent) were a smaller share of the total population served compared to California's overall population.

Approximately 20 percent of people enrolled in programs reporting to HDIS experienced chronic homelessness during the reporting period, defined as experiencing homelessness for at least one year over the course of three years while living with a serious mental illness, substance use issue, or physical disability. People experiencing chronic homelessness often have multiple co-occurring physical and mental health conditions. Not only can these conditions contribute to homelessness, but homelessness can also trigger or worsen health conditions.[16] Chronic patterns of homelessness were much more common for adult individuals than for families, particularly for older adults; approximately 40 percent of people over the age of 50 in HDIS experienced chronic patterns of homelessness during the reporting period.

The majority of people served by programs reporting to HDIS, 66.4 percent, were newly experiencing homelessness. Nearly 380,000 people served in California during the reporting period were newly experiencing homelessness.[17] Although it is not possible to say that these people were experiencing homelessness for the first time, the numbers nevertheless show that one of the largest challenges facing the state is the inflow of new people into homelessness, even as efforts to help people experiencing homelessness expand.

Service Utilization

Between 2018 and 2021, there were 1,116,741 enrollments in homelessness services, shelter stays, and housing projects across the state among the 571,246 unique people with HDIS records over the reporting period. Each of these enrollments was associated with a specific program recorded in HDIS and was funded by one or more federal, state, or local source(s) of funding.[18] The same person can enroll in multiple programs, so the number of enrollments reflects the number of times services are provided, rather than a count of people served. **Of total enrollments, 38.6 percent identified funding from at least one of the Landscape Assessment programs, either alone or in combination with other sources of funding.** The share of enrollments using at least one

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[16] National Academies of Sciences, Engineering, and Medicine, Permanent Supportive Housing: Evaluating the Evidence for Improving Health Outcomes Among People Experiencing Chronic Homelessness. (Washington, D.C.: The National Academies Press, 2018), https://doi.org/10.17226/25133.

[17] "Newly experiencing homelessness" is defined by having no recorded use of homelessness services, shelter, or housing in HDIS in the previous two years. As a result, some people in this category may be returning to homelessness after being housed for at least two years.

[18] In HDIS, the services that people access are called "projects", not "programs." However, because projects can be misinterpreted to mean physical projects or buildings, we use "programs" when discussing enrollments in HDIS.

Landscape Assessment program grew over time, from approximately 35 percent of enrollments in Fiscal Year 2018–19, to over 43 percent in Fiscal Year 2020–21.

The majority of people (60.9 percent) in HDIS were enrolled in only one program during the reporting period. The other 39.1 percent of people enrolled in multiple programs. However, **only 4.4 percent of people were enrolled in more than five different programs over the three fiscal years.** People with multiple enrollments tended to move between similar types of programs (e.g., multiple shelters, or multiple street outreach programs). People also enrolled in multiple housing programs at the same time, for example, enrolling in both a rapid re-housing and a permanent housing program.

The types of services people enrolled in depended on their household composition. Figure ES.4 shows the percent of enrollments in different programs reporting to HDIS by age and household type. Homelessness prevention and rapid re-housing were more commonly targeted to family households. In contrast, adult individuals were more likely to be enrolled in street outreach and emergency shelter programs. The data do not show a "typical" pathway of service utilization or linear steps to exiting homelessness.

Figure ES.4: Distribution of Enrollments in HDIS Reporting Programs during July 1, 2018 – June 30, 2021, by Household Type and Age
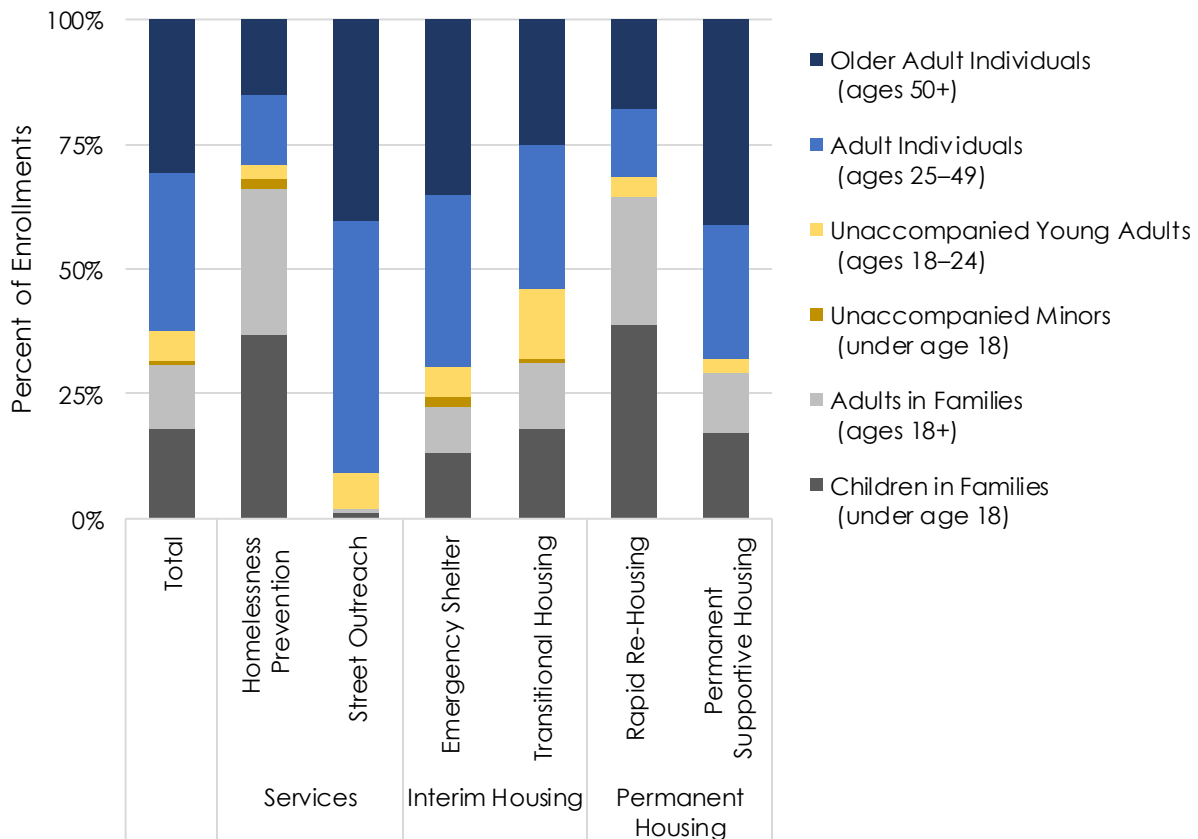
Source: Cal ICH Homeless Data Integration System

Expanding the Supply of Interim and Permanent Housing

Between 2018 and 2021, the state added more than 17,000 emergency shelter beds. Much of this increase was due to Project Roomkey, which deployed state and federal funds to quickly lease up hotel and motel rooms during the COVID-19 pandemic to provide non-congregate shelter to people experiencing homelessness. Project Roomkey helped to offset reduced capacity in existing shelters that closed or reduced occupancy during 2020. Between March 2020 and October 2022, Project Roomkey secured over 16,000 rooms and sheltered over 61,000 individuals. This increase in shelter capacity is likely to decrease, however, as some Project Roomkey grantees have ramped down programming in accordance with community need and resources.

Over $5.5 billion of the total $9.6 billion of state-administered funding assessed in this study were directed at eight programs specifically designed to facilitate the production or acquisition and rehabilitation of subsidized units. These investments are projected to **produce or preserve 58,714 units of affordable housing in the coming years,** including 10,451 set aside for people experiencing homelessness or those most at risk of becoming unhoused.

The state's Homekey program was also launched during the pandemic to convert underused hotels and motels into permanent supportive housing. Homekey added 2,245 units of permanent supportive housing, 2,894 units operating as interim shelter and undergoing plans for conversion to permanent supportive housing, and another 790 units that will remain interim shelter, almost all in under six months and at a lower cost than typical affordable housing units.

Public housing authorities are increasingly prioritizing people experiencing homelessness for housing, either through their tenant-based voucher program (which allows people to rent units in the private market) or by providing project-based vouchers for new affordable housing developments. Although vouchers are not administered by the state, they are an important component of overall efforts to provide deep housing assistance to households at risk or experiencing homelessness.

Recent state laws that have streamlined entitlement processes, as well as increased efforts to strengthen and hold cities accountable to their Regional Housing Needs Allocation targets, are important elements of the state's overall response to expanding the supply of affordable housing.

Outcomes

Figure ES.5 summarizes data for people based on the final observed outcome in HDIS, up through June 30, 2021. **Of the total number of unique people (571,246) observed in HDIS data over the reporting period, 168,974 people (29.6 percent), were still enrolled in a service, shelter, or housing program as of June 30, 2021.** The other 402,272 people (70.4 percent) served over the reporting period exited programs that report data to

HDIS before June 30, 2021, and did not enroll in another program before the end of the reporting period.

The data show that 19.8 percent of people served (96,417 people) were placed in permanent housing, with either a temporary or permanent subsidy. Of these, 55,263 people were still enrolled in programs reporting data to HDIS, such as rapid re-housing programs and permanent supportive housing projects. The other 40,884 were no longer enrolled, but were recorded as moving to some form of subsidized housing at the end of their last enrollment. A larger share of **people exited homelessness by moving into housing without a form of public subsidy (132,874, or 23.3 percent), including moving in with family or friends.**

Among people who exited programs reported in HDIS, the final outcome for 141,294 people (24.7 percent of total people served) was recorded as "unknown," meaning that program staff did not know what happened to their client or did not enter the data. Some of these people may have found housing on their own, while others may have enrolled in programs that do not report data to HDIS. However, unknown destinations were more common among people enrolled in street outreach and interim housing programs (such as emergency shelters), suggesting that many of these people may still be experiencing or at risk of homelessness.

Figure ES.5: Final Observed Outcomes (ongoing enrollments and destinations) for Unique People Served, through June 30, 2021

Final Observed Outcome for Population Served	Number of People	Percent of Total Population Served
Exited Programs Reporting to HDIS	**402,272**	**70.4%**
Exited to Homelessness	57,616	10.1%
Exited to Housing with a Temporary or Permanent Subsidy	40,884	7.2%
Exited to Housing without a Subsidy (including with Family or Friends)	132,874	23.3%
Exited to Other Destinations	29,604	5.2%
Exited to Unknown Destination	141,294	24.7%
Enrolled in Program Reporting Data to HDIS as of June 30, 2021	**168,974**	**29.6%**
Enrolled and Living in Permanent Housing (with a Temporary or Permanent Subsidy)	55,263	9.7%
Enrolled in Permanent Housing Program (but not recorded as having moved into unit)	50,560	8.9%
Enrolled in Interim Housing (e.g., Emergency Shelter)	38,816	6.8%
Enrolled in Services*	24,335	4.3%
Total	**571,246**	**100.0%**

Source: Cal ICH Homeless Data Integration System
Notes: Data include people with enrollments during July 1, 2018 through June 30, 2021. "Other" includes the following destinations recorded in HDIS: other, medical, or correctional facilities, temporary - host home,

temporary - not homeless, and deceased. * Includes 1,477 people enrolled in programs of unknown type or multiple programs.

The data also show that many people remained homeless at the end of the reporting period. Nearly 17 percent of the total population served (96,432 people) were either enrolled in interim housing (38,816 people) as of June 30, 2021, or had exited the system with a recorded destination of either sheltered or unsheltered homelessness (57,616 people). Many people also returned to homelessness after moving into housing, particularly people who received a temporary housing subsidy (22.6 percent) or those who moved in with family or friends (16.5 percent).

Finally, many people observed in HDIS were still being served at the end of the reporting period. Almost nine percent (50,560 people) were enrolled in a housing program (like rapid re-housing or permanent supportive housing) but had yet to move-in. Another 4.3 percent (24,335 people) were still enrolled in a non-housing program such as street outreach, homelessness prevention, or other services, at the end of the reporting period.

Conclusion

Through the Statewide Homelessness Landscape Assessment, Cal ICH is investing in data and analysis that can help to support state efforts to prevent and end homelessness across the state's diverse communities. This effort supports Cal ICH's Action Plan for Preventing and Ending Homelessness, which emphasizes the importance of measuring outcomes to promote equity and accountability.[19] HDIS will be a powerful tool for moving the field forward, particularly with ongoing efforts to provide technical assistance and capacity building to improve data quality at the local level. The Landscape Assessment thus lays the groundwork for future research that can help guide the state in its efforts to address homelessness.

It is important to note that it may be too early to fully realize the impact of the investments made in Fiscal Years 2018–19 through 2020–21. There are often lags between the time funds are appropriated, when those funds are spent locally, and when outcomes are possible to measure. Housing and shelter take time to build, and programs take time to hire and train staff, particularly while navigating disruptions caused by the COVID-19 pandemic. In addition, investments made in subsequent fiscal years will continue to build on and amplify the efforts described in this report. Local pilots—in service delivery, coordination, and in driving down the time and cost to build new housing—may also spur lessons that can be expanded at scale.

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[19] Cal ICH. "Action Plan for Preventing and Ending Homelessness in California." Updated September 2022. https://bcsh.ca.gov/calich/documents/action_plan.pdf

The research presented in this report describes the efforts that have been made to expand access to services and housing for people experiencing or at risk of homelessness.