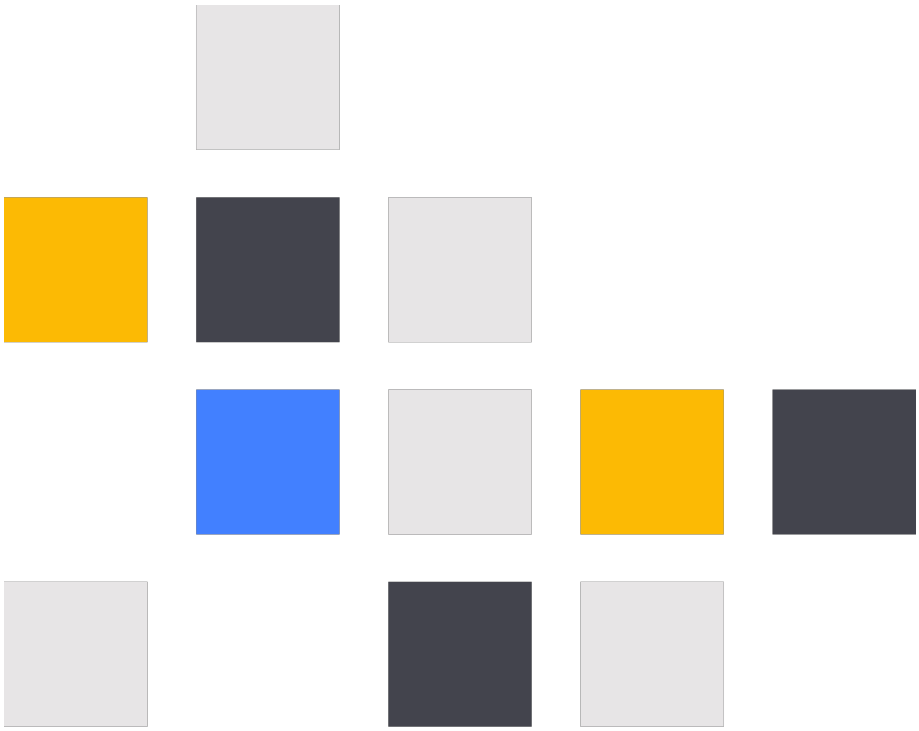
Homelessness Benchmarking

Comparing San Francisco to Peer Jurisdictions

This Benchmarking Report provides data and analysis comparing the San Francisco homeless population and the amount of housing and shelter provided by the City and County of San Francisco to peer jurisdictions from 2019 to 2022.



City Performance

July 26, 2023

City & County Of San Francisco
Office of the Controller
City Performance Unit

About the Controller's Office

The Controller is the chief financial officer and auditor for the City and County of San Francisco. We produce regular reports on the City's financial condition, economic condition, and the performance of City government. We are also responsible for key aspects of the City's financial operations, from processing payroll for City employees to processing and monitoring the City's budget. Our teams of accounting, analytical, financial, tech, and other professionals are committed to serving the public with integrity and want to see positive impacts from our work. We strive to be a model for good government and to make the City a better place to live and work.

About City Performance

The City Services Auditor (CSA) was created in the Office of the Controller through an amendment to the San Francisco City Charter that was approved by voters in November 2003. Within CSA, City Performance ensures the City's financial integrity and promotes efficient, effective, and accountable government.

City Performance Goals:

- City departments make transparent, data-driven decisions in policy development and operational management.
- City departments align programming with resources for greater efficiency and impact.
- City departments have the tools they need to innovate, test, and learn.

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Executive Summary

The Controller's Office is required by the City Charter to compile and publish comparisons of City government performance against other cities, counties and public agencies. Benchmarking results provide useful information for the public and policy makers to assess how San Francisco compares to similar peer jurisdictions and to identify areas for further research and awareness.

This benchmarking report compares San Francisco's homeless population and inventory of shelter and housing to 16 peer jurisdictions within California and across the country. This report examines federally-mandated Housing Inventory Count (HIC) data and Point-in-Time (PIT) Counts of persons experiencing homelessness from 2019 and 2022. By comparing results from 2022 to 2019, this report reflects the effects of the COVID-19 pandemic on individuals and families experiencing homelessness and gives insights into how jurisdictions altered operations to meet changing needs.

KEY RESULTS

West Coast jurisdictions report higher rates of overall homelessness compared to other parts of the country.

Most jurisdictions on the West Coast saw increases in total homelessness between 2019 and 2022, while many East Coast jurisdictions reported decreasing total homelessness. Jurisdictions in California, including Oakland, Los Angeles, San Francisco, and Berkeley had the highest count of persons experiencing homelessness per 100,000 residents in 2022 compared to peers. While nearly all peer jurisdictions in California saw increases in homelessness during the pandemic, San Francisco and Berkeley both reported a decrease in overall homelessness (3% and 5% respectively) from 2019 to 2022.

Unsheltered homelessness is more prevalent among California and West Coast jurisdictions than elsewhere in the country.

In 2022, California cities reported rates of unsheltered homelessness (i.e., living in tents, cars, or other places not meant for human habitation) of 57% to 76% of all persons counted, the highest rates of unsheltered homelessness across all peers. "Right to Shelter" jurisdictions like Boston, Washington D.C., and Hennepin County have mandates to provide shelter to certain individuals or family households, and these cities reported the lowest rates of unsheltered homelessness, ranging from 3% to 18% unsheltered. San Francisco reported 503 unsheltered individuals per 100,000 residents, a 15% decrease in unsheltered homelessness between 2019 and 2022.

Most jurisdictions increased temporary shelter inventory during the COVID-19 pandemic, but current inventory does not meet demand across a majority of jurisdictions.

The pandemic prompted service changes for many jurisdictions. Most, including San Francisco, decreased congregate shelter capacity, per federal COVID-19 safety measures, and launched alternative, non-congregate programs to safely shelter individuals experiencing homelessness. "Right to Shelter" jurisdictions provided the most temporary shelter for persons experiencing homelessness. San Francisco reported the fourth-highest count of temporary shelter beds among peers, with 480 beds per 100,000 city residents. However, a majority of peer jurisdictions, including San Francisco, did not report sufficient

temporary shelter beds to be able to provide shelter to all person's counted in that city's Point in Time count of homeless individuals (i.e., fewer than 90 beds per 100 persons experiencing homelessness in a jurisdiction).

A majority of jurisdictions increased their housing options for individuals experiencing homelessness during the pandemic.

Many jurisdictions leveraged new federal and state funding to increase their inventory of housing options designated for individuals experiencing homelessness. Twelve of the 17 peer jurisdictions reported an increase in Permanent Housing units between 2019 and 2022, and all but one jurisdiction increased Rapid Rehousing units in that time. Washington, D.C. reported the most significant increase in housing options. In 2022, San Francisco reported 1,423 units of Permanent Housing and 220 units of Rapid Rehousing per 100,000 residents, well above the peer average and second only to Washington, D.C. in total count of housing options per 100,000 residents.

Background

Through this report, the Controller's Office provides analysis to show how San Francisco compares to peer jurisdictions in terms of the homeless population, certain homeless sub-populations, and the amount of housing and shelter provided.

Benchmarking results provide useful information for the public and policy makers to assess how San Francisco compares to similar peer jurisdictions and to identify areas for further research and awareness. It is important to note that benchmark comparisons must always be informed by the context of the geographic area surveyed; for example, the climate, housing market, other unique physical constraints, and historical context of San Francisco and each of our peer cities should inform the data shown here.

Examining the Impacts of COVID-19

This report examines federally-mandated Point-in-Time (PIT) Counts of persons experiencing homelessness from 2019 and 2022. Between these years, the COVID-19 pandemic had major impacts on individuals experiencing homelessness and contributed to unprecedented challenges for jurisdictions working to help this population.

During this time, service providers pivoted operations and reduced congregate shelter capacity, per federal COVID-19 safety measures, to minimize risks and promote greater safety for vulnerable, unhoused residents. Like many of its peers, San Francisco significantly decreased congregate shelter capacity to mitigate health risks and initiated alternative shelter programs, including hotel rooms, trailers, and Safe Sleep tent sites, so that guests could isolate, quarantine, or shelter-in-place.

In response to the pandemic, the U.S. Department of Housing and Urban Development (HUD) waived the requirement for communities to conduct the count of unsheltered homelessness in 2021, with 64% of communities choosing to forgo a count or do a a partial count in January 2021. Subsequent to this, many jurisdicitions changed how they conducted their PIT Counts—relying on fewer volunteers, conducting the PIT Count over multiple days, collecting less information, etc.—impacting data quality and comparability of data across jurisdictions.

Between 2019 and 2022, there were also major changes in the results of the Housing Inventory Count (HIC), a national inventory of shelter beds and housing for people experiencing homelessness. With an influx in federal funding sources like the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), communities increased their inventories of emergency shelter and housing. In some cases, HUD did not provide guidance about the how to reflect new initiatives related to COVID-19 response within annual HIC reporting, such as for "shelter-in-place" hotel rooms, which created inconsistencies in reporting across jurisdictions and possible data quality concerns.

Peer Jurisdictions

Benchmarking compares San Francisco to jurisdictions from California and the United States at the city-level or county-level depending on the measure. For this report, the Controller's Office adapted a list of peer jurisdictions developed through prior benchmarking analysis. The Controller's Office originally selected 16 peers using a "likeness score" methodology that accounted for population and population density.

Within this report, the Controller's Office adapted the list of peer jurisdictions for each measure based on what data was available. Jurisdictions typically report both PIT Count and HIC data to HUD via a "Continuum of Care" (CoC) reporting entity. In many cases, the CoC aligns to a city or county, but there are some CoCs that contain multiple counties or have variable geographic boundaries. CoC's may provide city-specific data within a public report, or cities within a CoC may report their own PIT Count data publicly.

Where possible, this report uses PIT Count analysis on persons experiencing homelessness specific to a peer city (e.g., Oakland, CA) from 2019 and 2022. If a peer city has not published a report of PIT Count data, the benchmarking analysis uses data reported to HUD for the CoC that includes the peer jurisdiction of interest. If a CoC is used, this is indicated in the name of the jurisdiction within each chart. Certain charts show data normalized per 100,000 residents according to the geographic boundaries of the jurisdiction or CoC. In Section 2: Shelter and Housing, a single chart uses a different normalization methodology, showing data normalized per 100 persons experiencing homelessness in 2022.

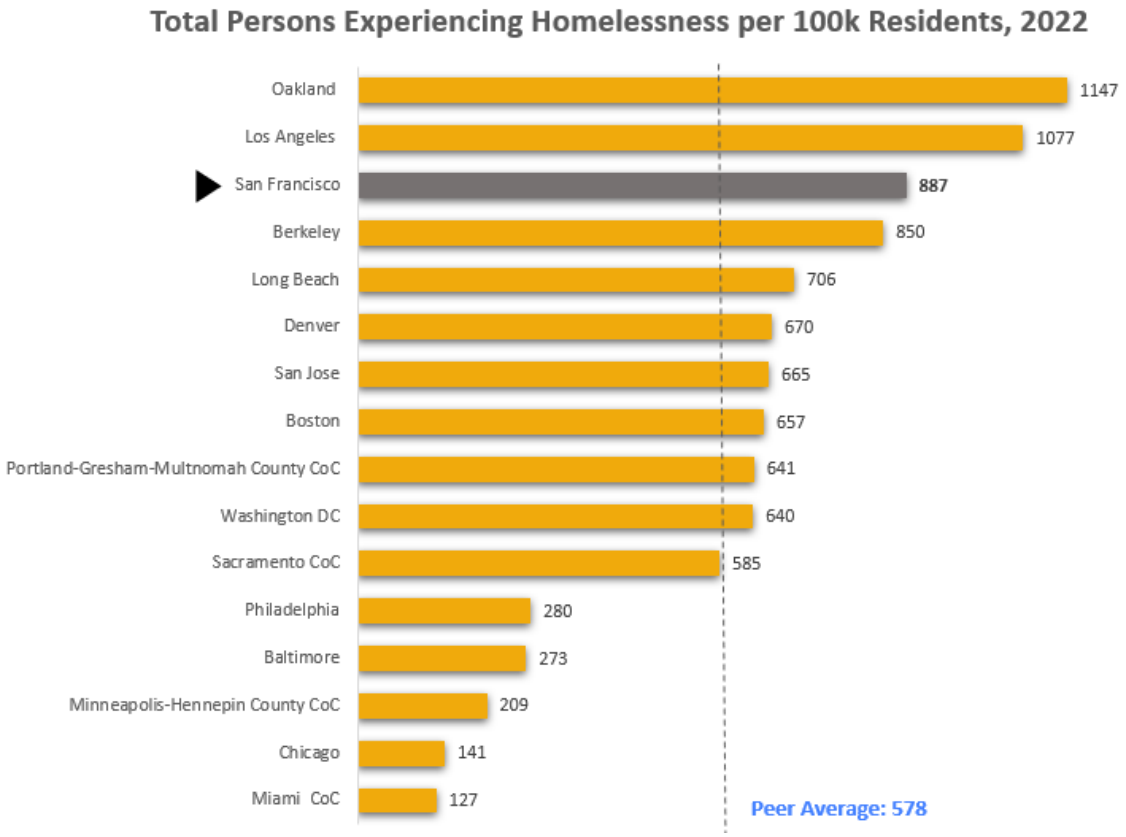
This report analyzes 2019 and 2022 HIC data. HIC data is not consistently available at the city level, and all HIC analyses in this report compares 2019 and 2022 CoC data provided to HUD.

More detailed information is in the Methodology Section of the Appendix.

Section 1: Point-in-Time Count

OVERALL HOMELESSNESS

According to the 2022 PIT Count, San Francisco had 887 individuals experiencing homelessness per 100,000 residents, above the **peer average of 578**. Ten of the 16 jurisdictions examined, including San Francisco, had higher counts of individuals experiencing homelessness than the peer average.[1] The counts of persons experiencing homelessness show a great deal of variability across the peer jurisdictions, from the highest counts per 100,000 residents in Oakland and Los Angeles to the lowest counts in Philadelphia, Baltimore, Minneapolis CoC, Chicago, and Miami CoC. Comparing to the median of 641 persons per 100,000 residents, seven out of the 16 jurisdictions were +/- 70 from the median (a range of 585-706).



Jurisdictions in California, including Oakland, Los Angeles, San Francisco, and Berkeley, had among the highest PIT Counts compared to peers, aligned with state-wide trends. Over the last three years of the pandemic,

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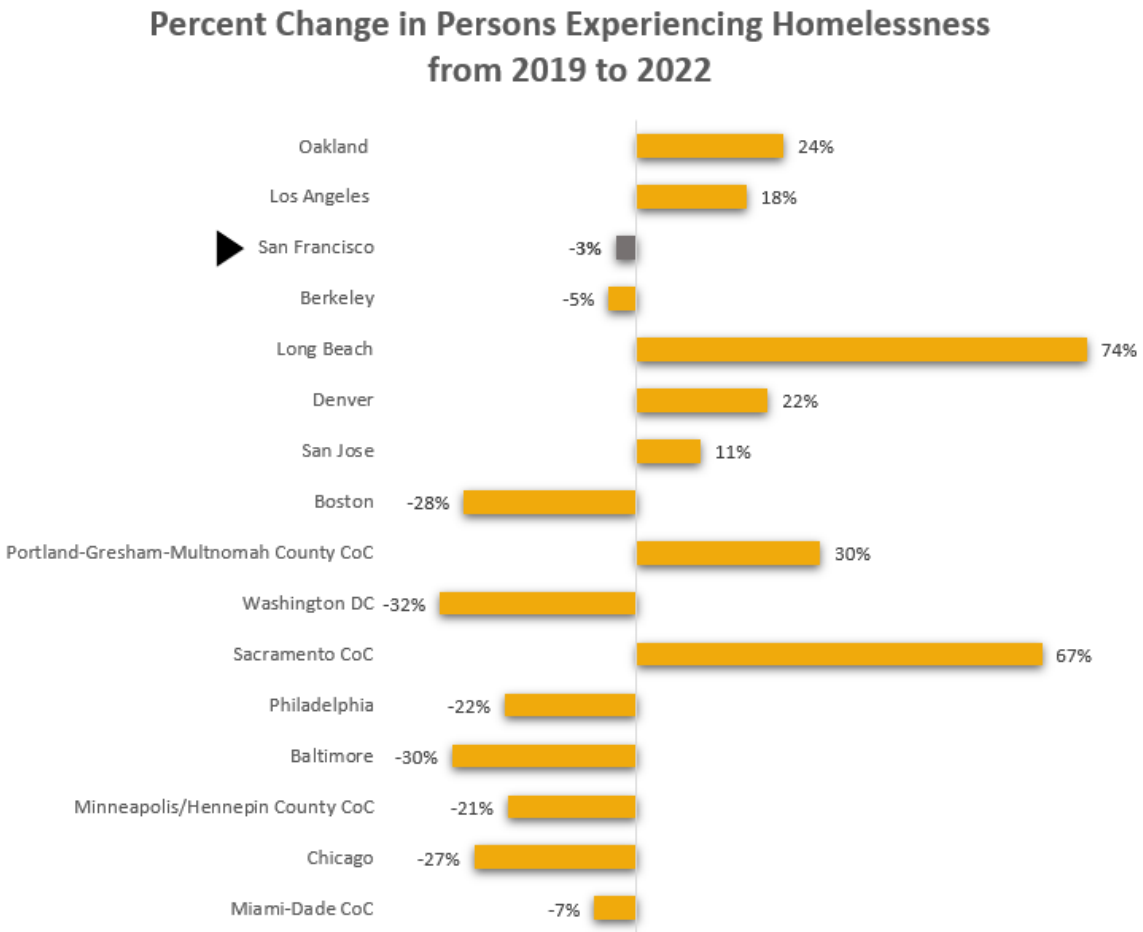
1 Seattle and New York are excluded from the PIT Count analysis in Section 1 of the report. In 2022, King County CoC, including the peer city of Seattle, did not conduct the PIT Count and received a methodological exception to conduct the count through a qualitative interview process. New York City did not publicly provide a count of sheltered homelessness. Both Seattle/King County CoC and New York CoC are included Section 2 of the report, which uses HIC data reported to HUD.

homelessness in California grew by 22,500 individuals.[2] In 2022, the state accounted for half of all unsheltered individuals in the country and had the highest rate of homelessness.[3]

Change in Homelessness Over Time

Though San Francisco was higher than the peer average in terms of total count of persons experiencing homelessness per 100,000 residents, **overall homelessness decreased in San Francisco from 2019 to 2022 by 3%** while other jurisdictions in California, like Sacramento, San Jose, and Oakland, saw increases in the percent of persons experiencing homelessness. The chart below, which is sorted based on total persons experiencing homelessness in each jurisdiction per the chart on the prior page, shows that many of the jurisdictions with lower total counts of persons experiencing homelessness also experienced reductions in their counts since 2019. For example, Chicago experienced a 27% decrease in its overall homelessness count between 2019 and 2022, and Baltimore saw a 30% decrease.



[2] Tobias, M. (2022, October 6). *California homeless population grew by 22,000 over pandemic*. CalMatters. https://calmatters.org/housing/2022/10/california-homeless-crisis-latinos/

[3] The U.S. Department of Housing and Urban Development. (2022). The 2022 Annual Homeless Assessment Report (AHAR) to Congress.https://www.huduser.gov/portal/sites/default/files/pdf/2022-AHAR-Part-1.pdf. P. 7

Sheltered vs. Unsheltered Homelessness

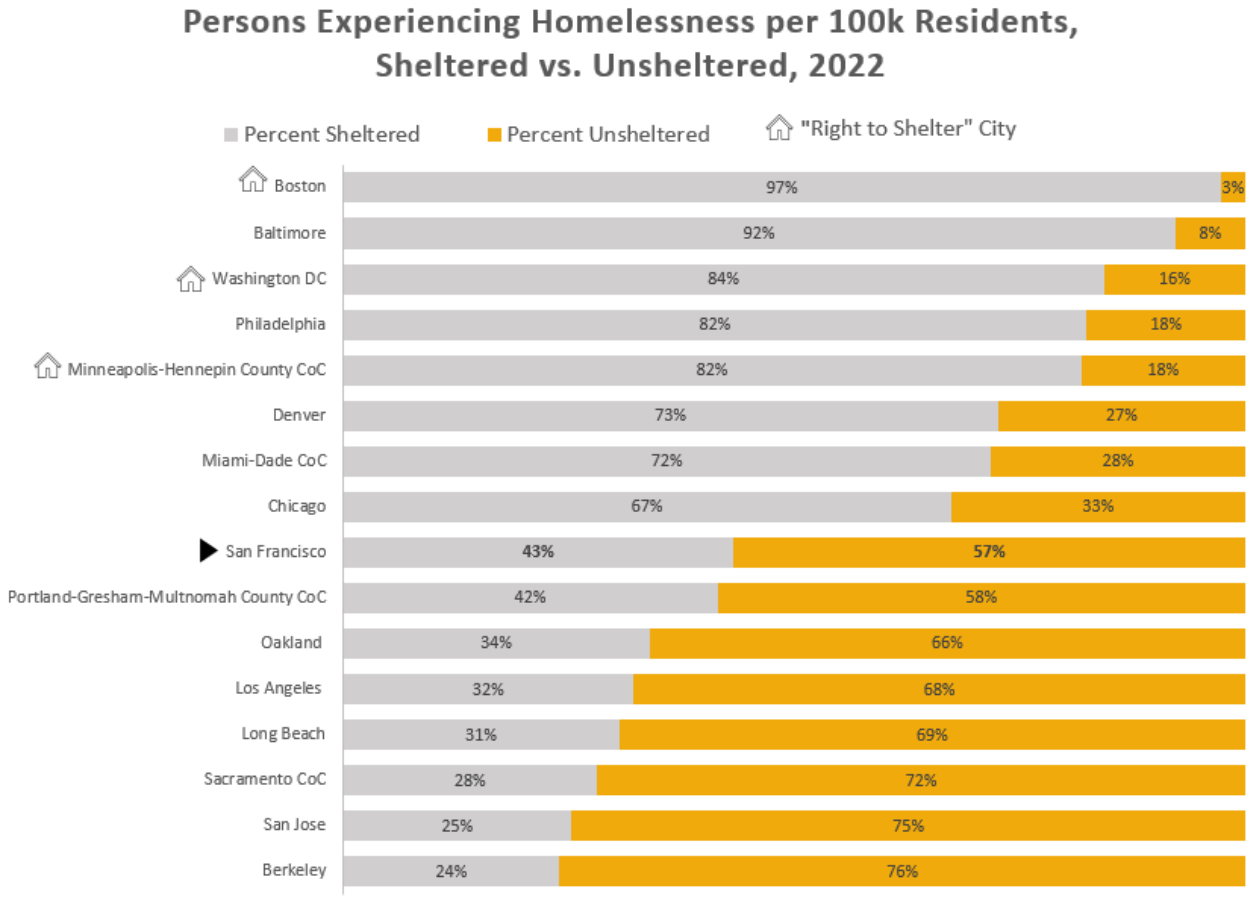
The PIT Count documents whether an individual or household is sheltered or unsheltered on the night of the count.

Shelter Definitions

"Sheltered Homelessness" refers to *people experiencing homelessness who are in emergency shelters, transitional housing, or other temporary settings.*

"Unsheltered Homelessness" refers to *people whose primary nighttime location is a public or private place not designated for, or ordinarily used as, a regular sleeping accommodation for people, such as vehicles or parks.*

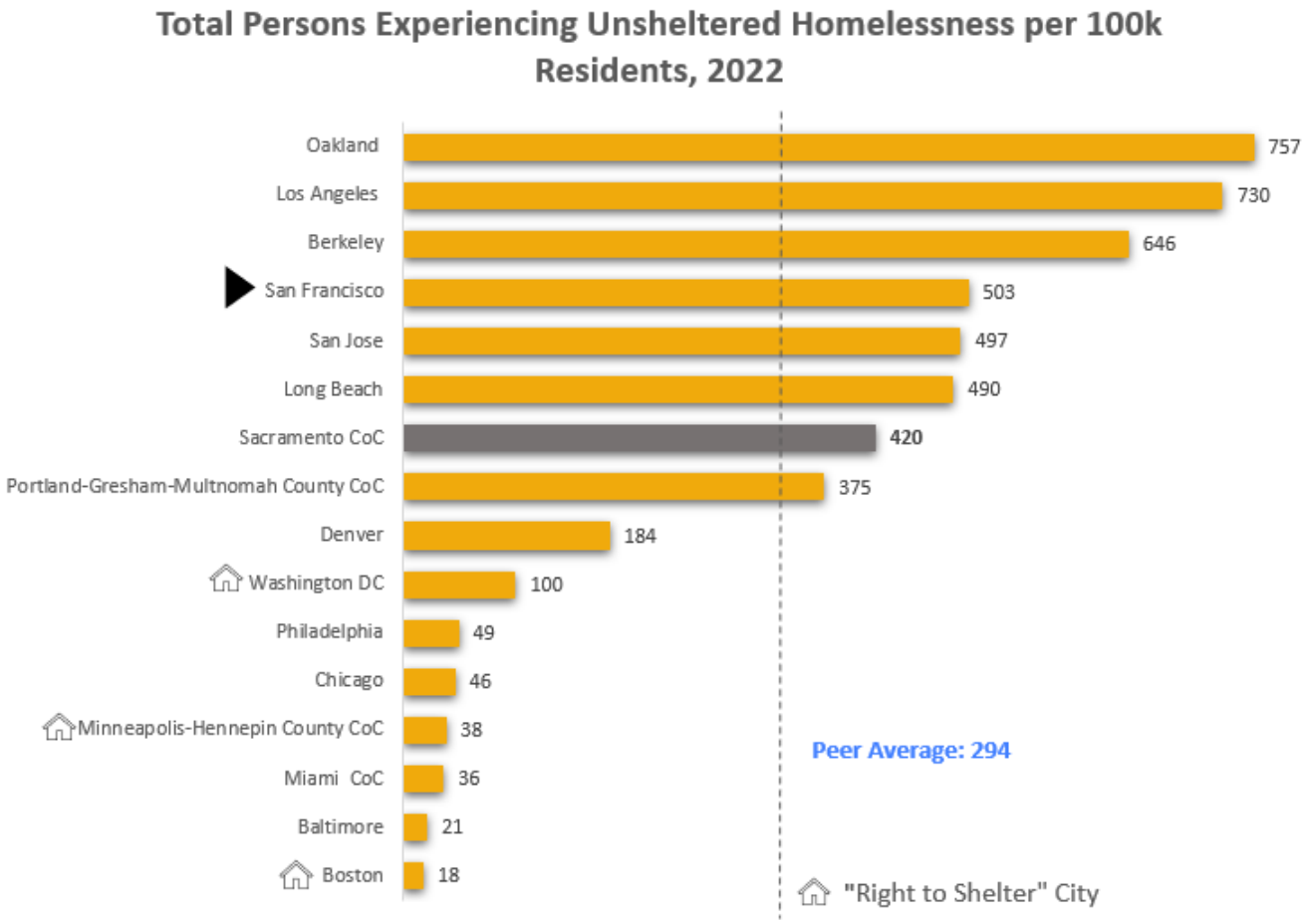
In 2022, **43% of individuals experiencing homelessness in San Francisco were sheltered and 57% were unsheltered**. By contrast, in 2019, 36% of San Franciscans experiencing homelessness were sheltered. "Right to Shelter" jurisdictions like Boston and Washington D.C. had among the highest percentages of sheltered individuals experiencing homelessness, although no jurisdiction had zero unsheltered individuals (read more about "Right to Shelter" jurisdictions on page 11).



Individuals and households experiencing unsheltered homelessness have unique needs that make them a priority population for policymakers and service providers. They are typically harder to reach for services and have higher rates of chronic disease, serious mental illness, and substance use disorders than sheltered

populations.[4] Unsheltered homelessness increased nationally by 30% between 2015 and 2020 according to HUD.[5]

In 2020, in response to the pandemic, San Francisco significantly decreased congregate shelter capacity and launched new non-congregate programs during the pandemic. This mirrors national trends in the shelter and housing inventory stock: many jurisdictions reduced congregate shelter capacity and created emergency non-congregate shelter options. However, changes in unsheltered homelessness are not solely tied to a jurisdiction's shelter inventory; changes across a jurisdiction's support system can impact the number of people experiencing unsheltered homelessness, including availability of housing and prevention services. See **Section 2: Shelter and Housing** for more about changing shelter and housing inventory across peers.



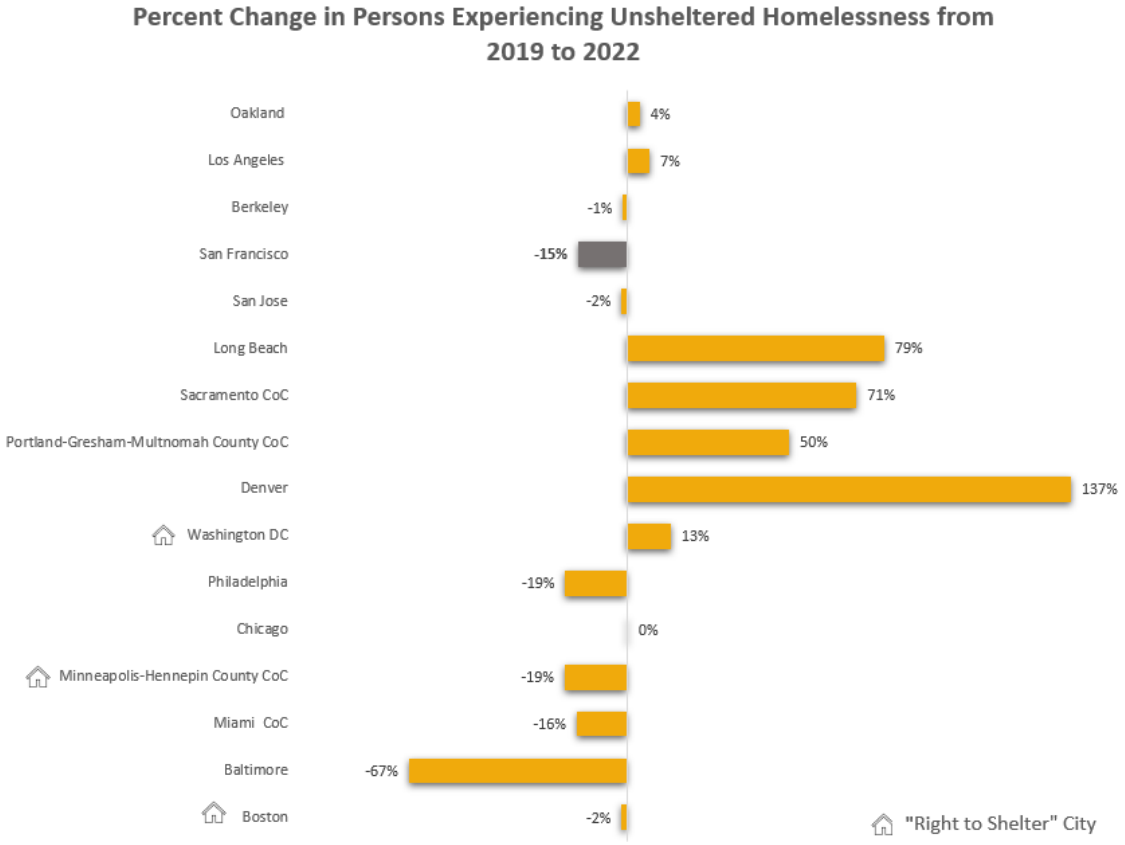
In 2022, San Francisco reported 503 persons experiencing unsheltered homelessness per 100,000 residents. California jurisdictions have the highest rates of unsheltered homelessness among the peer jurisdictions included in this report, and these California cities contribute to a **peer average of 294 persons per 100,000 residents**. This is compared to seven jurisdictions outside of California reporting 100 or fewer persons

[4] Richards, J. and Kuhn, R. (2022, October 28). Unsheltered Homelessness and Health: A Literature Review. *American Journal of Preventive Medicine*. https://doi.org/10.1016/j.focus.2022.100043

[5] The pandemic has made homelessness more visible in many American cities. (2021, August 5). *The Economist.* https://www.economist.com/united-states/2021/08/02/the-pandemic-has-made-homelessness-more-visible-in-many-american-cities

experiencing unsheltered homelessness per 100,000 residents. The **median is 184** persons experiencing unsheltered homelessness per 100,000 residents.

While most California jurisdictions experienced increases in persons experiencing unsheltered homelessness from 2019 to 2022, **San Francisco saw a 15% decrease in unsheltered homelessness**. Denver experienced the greatest increase in unsheltered homelessness across all peers between 2019 and 2022, rising 137% to 184 persons per 100,000 residents. Baltimore experienced the greatest decrease at -67%.



"Right to Shelter" jurisdictions have varying sheltering guidelines.

Washington D.C.: Washington D.C. provides shelter for any person experiencing homelessness during extreme weather conditions (when the temperature is below 32 degrees or above 95 degrees Fahrenheit). The jurisdiction is not required to provide shelter to all persons at other times but prioritizes rapid placement for families year-round.

New York City: In New York City, single adults experiencing homelessness are, at minimum, offered placement at a congregate shelter within a day of intake at a homeless intake center. Families with children must be provided a private room with cooking facilities and a bathroom. The city must provide shelter by 4 a.m. for families entering intake by 10 p.m.

Boston: Massachusetts has a state-level law that requires cities like Boston to provide immediate shelter to families with children under the age of 21 or pregnant individuals with no children who meet specific criteria.

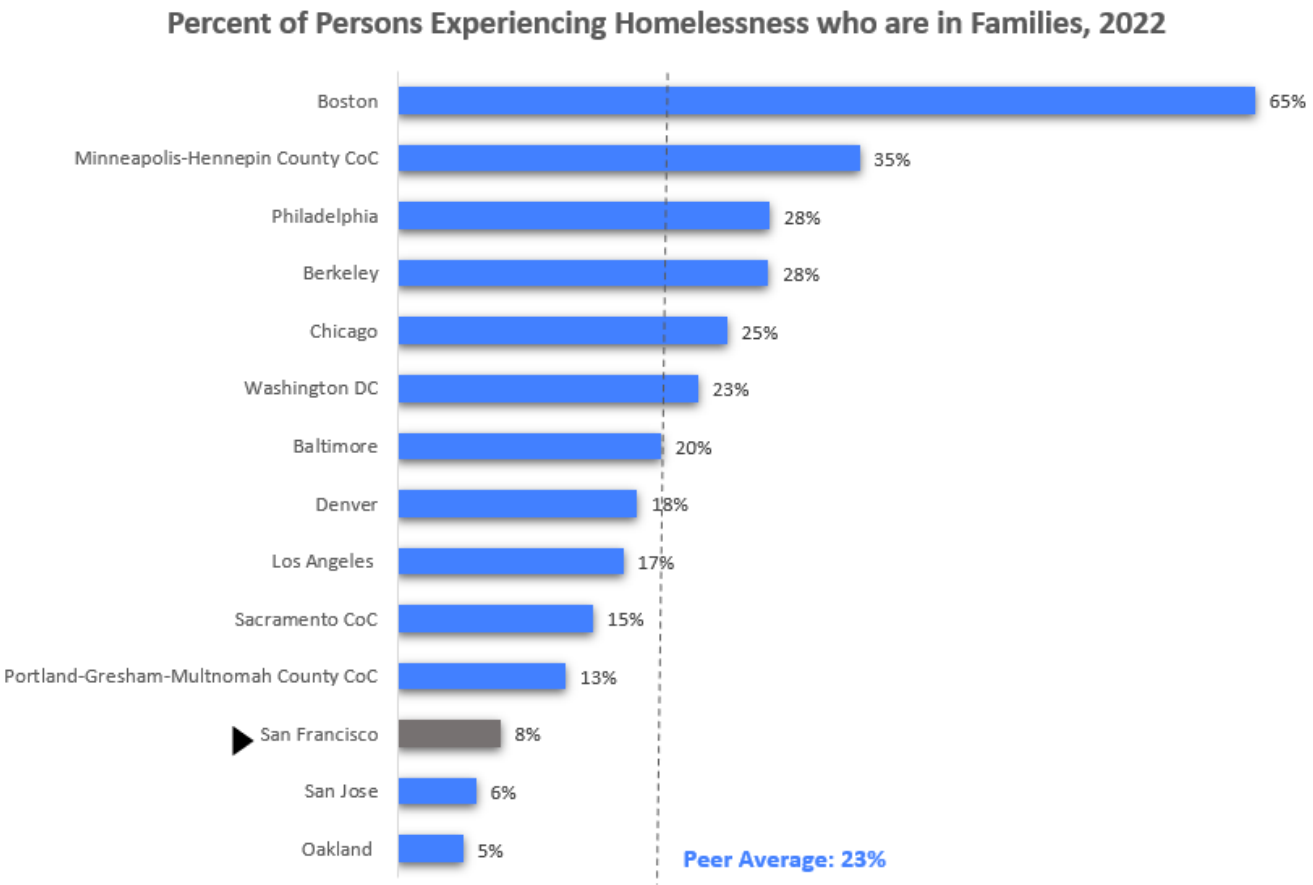
Hennepin County: Hennepin County is required to provide shelter for families experiencing homelessness.

PRIORITY POPULATIONS

HUD requires CoCs to report on certain priority populations experiencing homelessness, including individuals who are chronically homeless, individuals in families, youth, and veterans. There are reporting variances in how cities and CoCs report on these priority populations, and not all cities follow HUD definitions when publishing PIT Count data. For example, some jurisdictions counted and categorized all individuals 24 years or younger as youth, including minors under 18, whereas HUD requires a breakdown for transitional aged youth (aged 18-24) distinct from minors under age 18. The charts below represent the jurisdictions for which priority population data can be reasonably verified, and only peer jurisdictions with verified data will appear in a given chart.

Family Homelessness

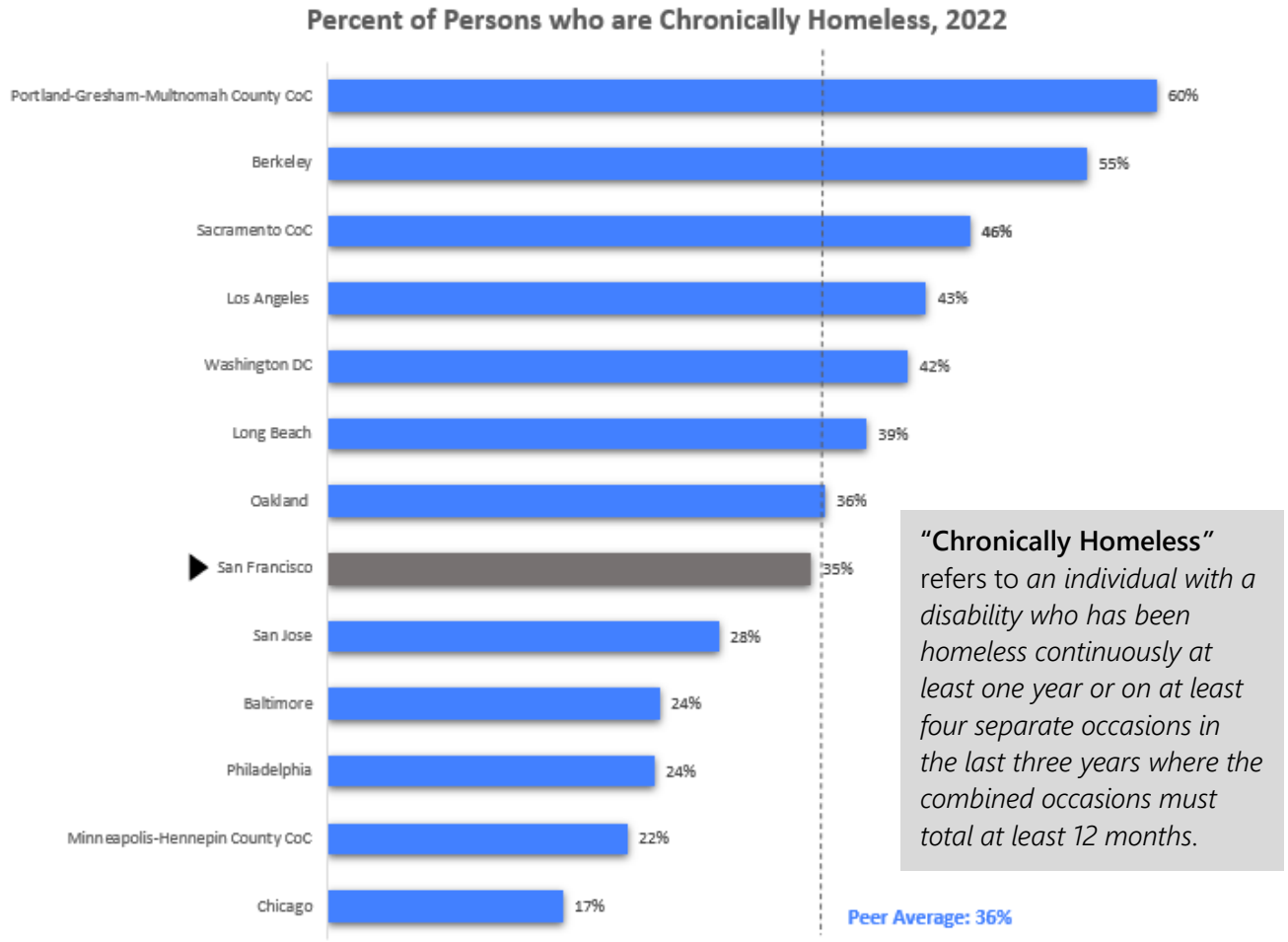
In 2022, an estimated 8% of people experiencing homelessness in San Francisco identified as being in families with children (under age 18), significantly lower than the **peer average of 23%**, and similar to the 8% of persons in families counted in San Francisco in 2019. Boston's PIT Count results pull the average higher with 65% of estimated persons experiencing homelessness being in families with children (among these, families in Boston are largely sheltered). Looking at the peer median of 19% better accounts for this outlier. The two jurisidictions with the highest percent of family homelessness, Boston and Hennepin County, are mandated to provide shelter for homeless families ("Right to Shelter" policies are detailed on previous page).



Chronic Homelessness

In 2022, an estimated 35% of individuals experiencing homelessness in San Francisco identified as chronically homeless, slightly under the **peer average of 36%**. There was a marginal decrease in chronic homelessness in San Francisco in 2022, down from 38% in 2019. According to the HUD's 2022 Annual Homelessness Assessment Report (AHAR) to Congress, chronic homelessness has been on the rise since 2007. Between 2020 and 2022, there was a 16% increase nationwide, with California having the highest absolute increase.[6]

Persons experiencing chronic homelessness have distinct needs and are harder to adequately serve compared to those experiencing brief episodes of homelessness. These needs compound the longer an individual remains homeless Persons who are chronically homeless often use emergency shelters more frequently and for longer periods of time than those who are not chronically homeless.[7] Additionally, the longer a person remains homeless, the more difficult it can be to place them in housing due to deteriorating health, trauma experienced while homeless, and higher levels of support service needs to enter and retain housing.[8]



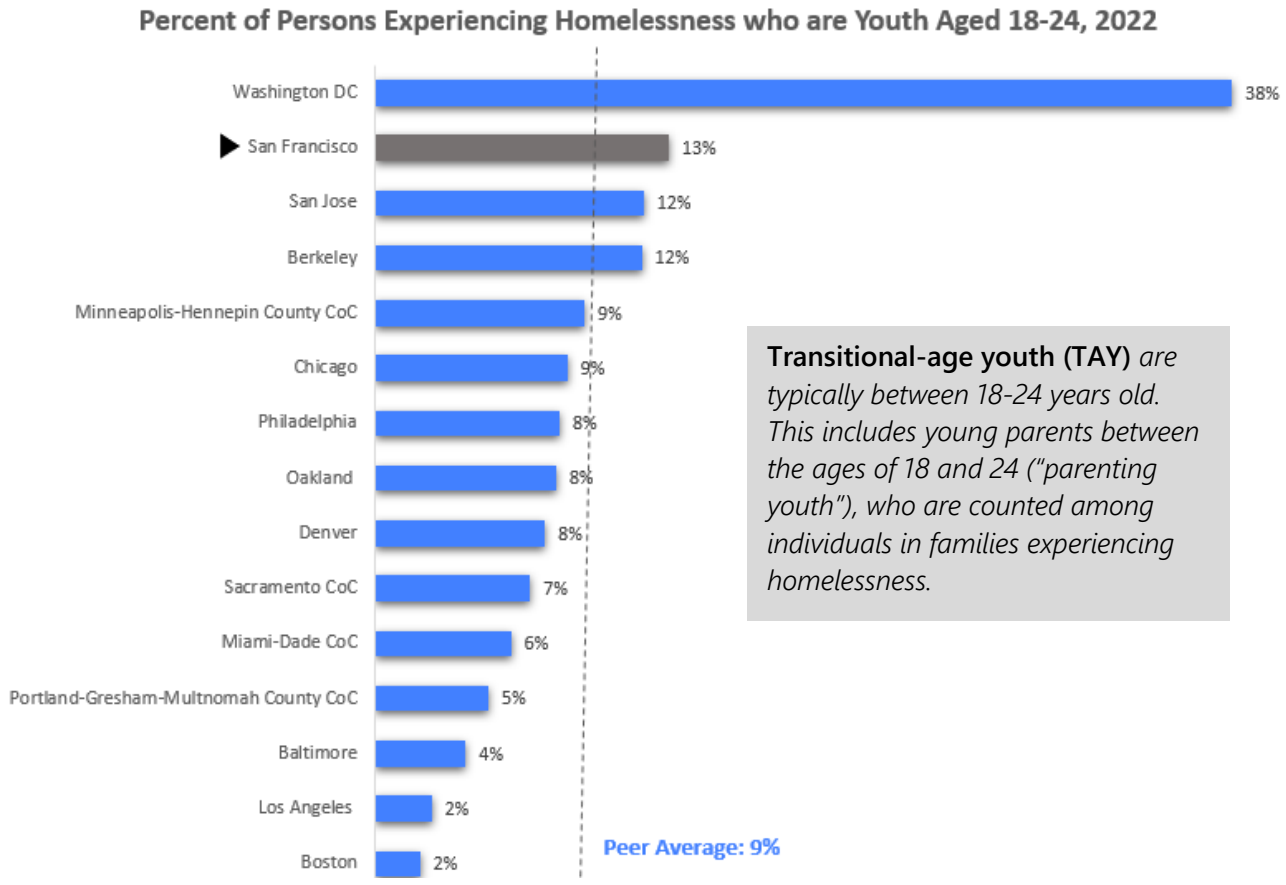
[6] The U.S. Department of Housing and Urban Development. (2022). The 2022 Annual Homeless Assessment Report (AHAR) to Congress. https://www.huduser.gov/portal/sites/default/files/pdf/2022-AHAR-Part-1.pdf. P. 73.
[7] *Chronic Homelessness: Background, Research, and Outcomes.* (n.d.) (2015). https://www.everycrsreport.com/files/20151208_R44302_e294f3360cec6de495f40ae4c8ec2de81acac34d.pdf.
[8] Substance Abuse and Mental Health Services Administration (2022). *Homelessness Resources: Housing and Shelter*. https://www.samhsa.gov/homelessness-programs-resources/hpr-resources/housing-shelter

Youth Homelessness

HUD requires all CoCs report the total number of persons experiencing homelessness for each household type by different age categories. This includes households with transitional-age youth (TAY) aged 18-24, per the 2022 HIC and PIT Data Collection Notice. Individual jurisdictions may or may not publish the same level of detail on this household type in their city PIT Count reports which leads to some variance in which jurisdictions are included in the chart below.

HUD requires specific reporting on this population because TAY have historically been difficult to track and serve effectively due to the hidden nature of youth homelessness.[9] This population is also at the age during which they are transitioning out of public systems, such as foster care, and face greater challenges in adulthood if impacted by the trauma of homelessness.

In 2022, an estimated 13% of persons experiencing homelessness in San Francisco identified as a youth, slightly higher than the **peer average of 9%.** San Francisco's PIT Count survey identified that its TAY population is more diverse than the adult homeless population (above age 25), including higher counts of youth identifying as Black and Multi-Racial, and identifying as Lesbian, Gay, Bisexual, Transgender and/or Queer (LGBTQ). All jurisdictions reported on TAY aged 18-24 except for Baltimore, Boston, Denver, and San Jose, which counted all "unaccompanied youth" and may have included minors under 18.



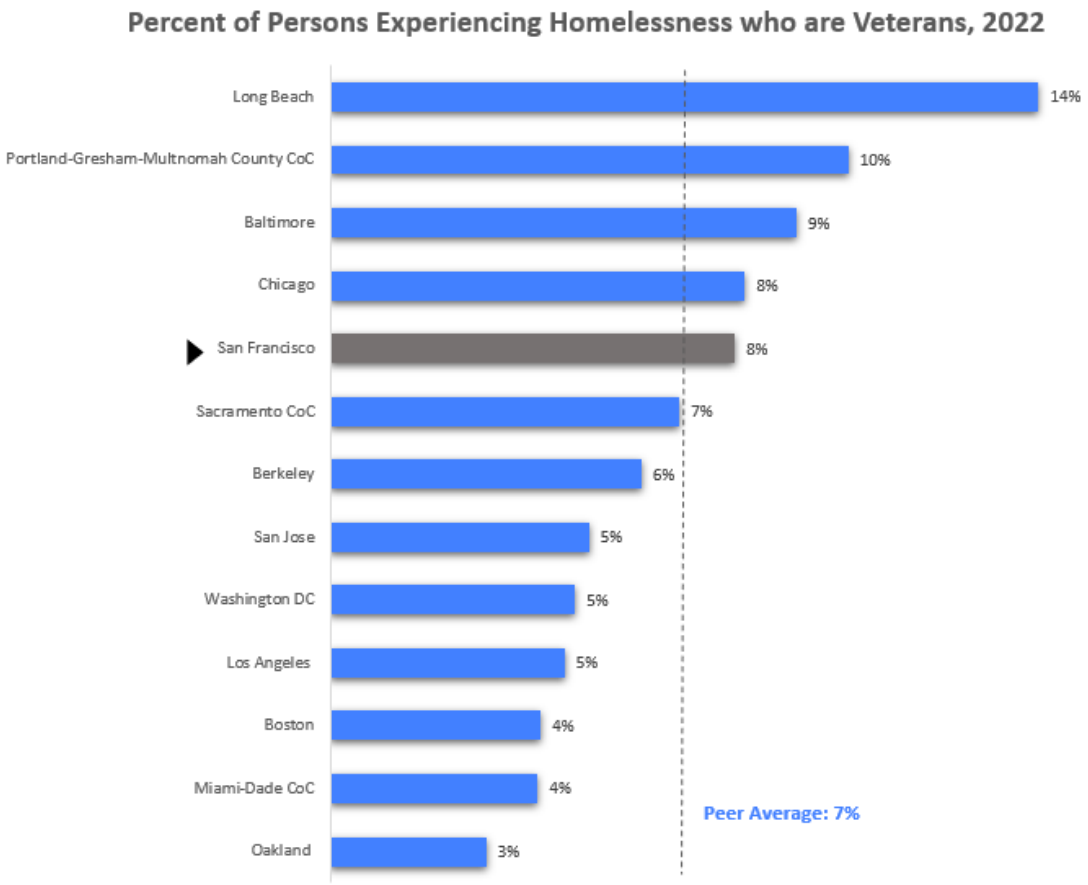
Transitional-age youth (TAY) *are typically between 18-24 years old. This includes young parents between the ages of 18 and 24 ("parenting youth"), who are counted among individuals in families experiencing homelessness.*

[9] Beiner, C. (2022, February 15). *Homeless youth and children are wildly undercounted, advocates say.* NPR. https://www.npr.org/2022/02/15/1073791409/homeless-youth-and-children-are-wildly-undercounted-advocates-say

Washington D.C. reported that 38% of persons (521 individuals) counted in 2022 were transitional-age youth experiencing homelessness, significantly higher than the peer average. Washington D.C.'s PIT Count Report states this increase is due to both an influx of youth new to the system, as well as an expansion of its service inventory for youth as of 2021.

Veteran Homelessness

In 2022, an estimated 8% of San Franciscans experiencing homelessness identified as a veteran, similar to the **7% peer average**, which also aligns with relatively low national trends. Though the percent of veteran homelessness in San Francisco stayed level at 8% since 2019, according to HUD's 2022 Annual Homelessness Assessment Report (AHAR) to Congress, between 2020 and 2022 the percent of veterans experiencing homelessness decreased by 11%, with California, Colorado, and Massachusetts having the largest absolute decreases.[10]

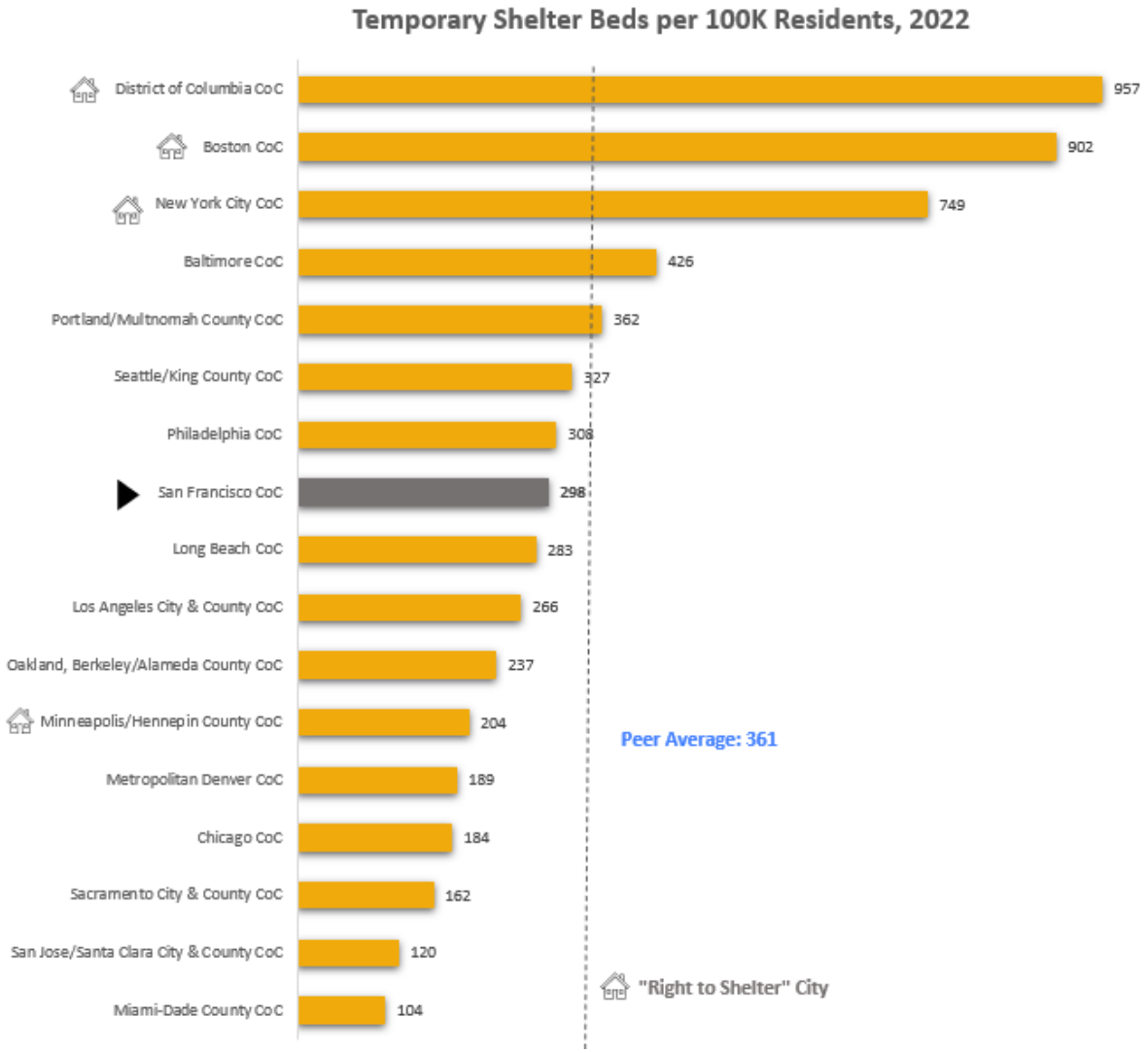


[10] The U.S. Department of Housing and Urban Development. (2022). The 2022 Annual Homeless Assessment Report (AHAR) to Congress. https://www.huduser.gov/portal/sites/default/files/pdf/2022-AHAR-Part-1.pdf. P. 64.

Section 2: Shelter and Housing

TEMPORARY SHELTER

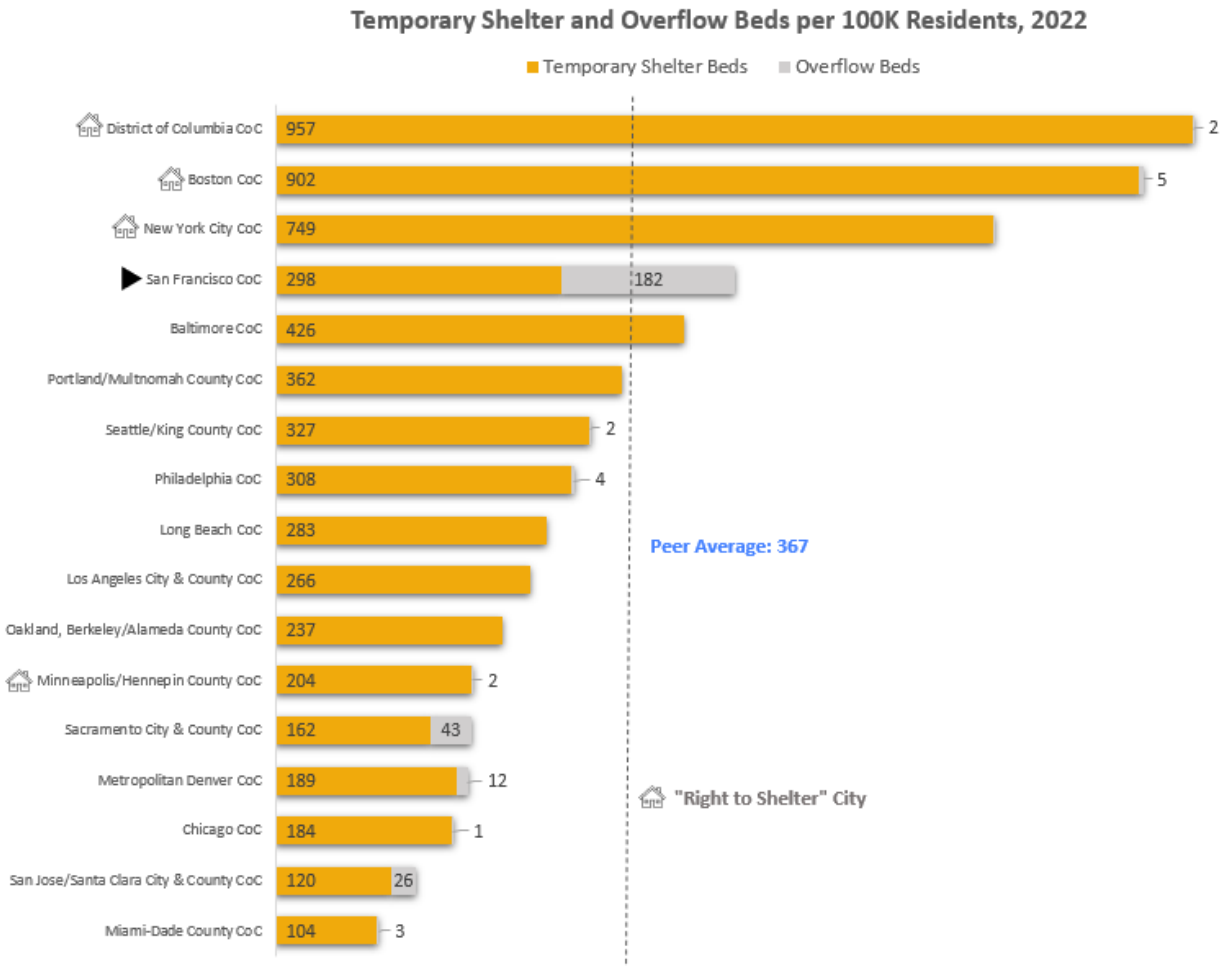
In 2022, the San Francisco CoC reported **298 Temporary Shelter Beds per 100,000 residents**, which includes beds categorized as Emergency Shelter, Safe Haven, and Transitional Housing. This is less than the **peer average of 361** Temporary Shelter Beds per 100,000 residents.[11] Several "Right to Shelter" cities—Washington D.C., New York, and Boston—had significantly higher counts of Temporary Shelter Beds per 100,000 residents compared to other jurisdictions and brought up the peer average. Mitigating the impact of these outliers, the median is 274 beds. If Right to Shelter jurisdictions are excluded, the peer average is 247 beds.



[11] See the appendix for a breakdown of all bed types for adult households and households with minor children.

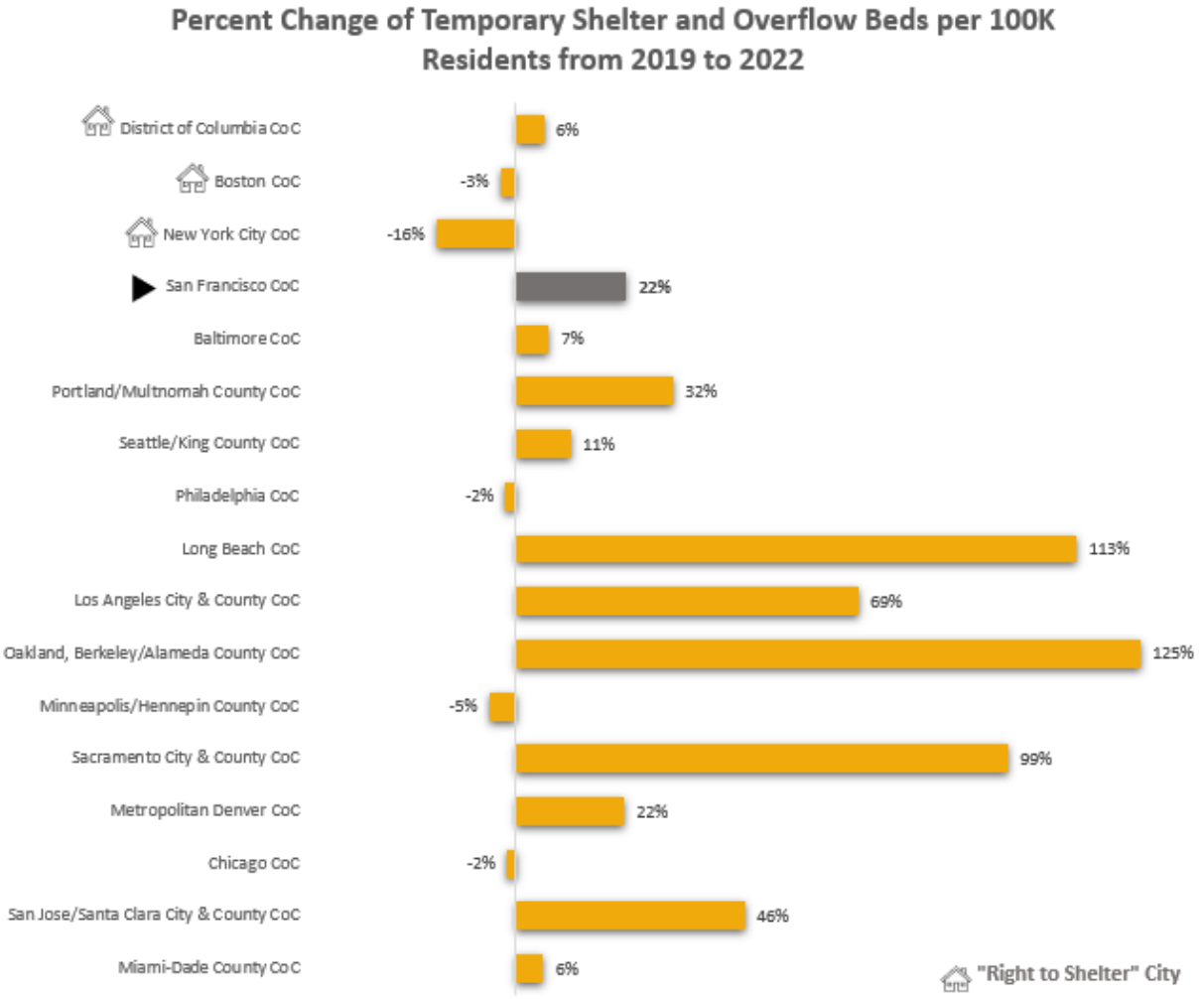
During the COVID-19 pandemic, San Francisco significantly reduced capacity at congregate shelter programs to allow for safe spacing of guests, and certain smaller programs that could not operate safely temporarily closed. This is borne out in the percent change in Temporary Shelter Beds from 2019 to 2022, during which Temporary Shelter Beds decreased by 23% for the San Francisco CoC.

During this time, San Francisco also expanded other types of emergency shelter and other alternative shelter types. San Francisco categorized many of the COVID-19 related interventions as "Overflow Beds" in the annual HIC submission, with Shelter-In-Place (SIP) hotel rooms as the largest category of new beds, accounting for 1,552 beds in 2022. This compares to 25 total beds in the "Overflow" category in 2019. Taking the total of Temporary Shelter and Overflow Beds, **San Francisco reported 480 beds per 100,000 residents**, with the fourth highest count of beds after most "Right to Shelter" jurisdictions and surpassing the **peer average of 367**. Excluding Right to Shelter jurisdictions, the peer average is 255.



Twelve peer jurisdictions had Temporary Shelter Bed inventory counts lower than the peer average. Tracking of COVID-19 related response measures was not standardized by HUD, and so it is not known how each peer jurisdiction categorized any COVID-19 shelter programs. While San Francisco chose to categorize its SIP hotels as Overflow Beds, the low numbers of Overflow Beds in nearly all other jurisdictions suggest they may have included their COVID-related interventions in their Temporary Shelter Bed count or used another categorization.

Combining Temporary Shelter Beds and Overflow Beds, San Francisco increased its percent of Temporary Shelter and Overflow Beds per 100,000 residents by **22% from 2019 to 2022,** counteracting the reduction in congregate shelter beds. Compared to peer jurisdictions, San Francisco had the most significant increase in the Overflow Beds category. Long Beach CoC and Oakland/Berkeley/Alameda County CoC have the highest percent change in Temporary Shelter and Overflow Beds, though both continue to have total shelter inventories below the peer average (283 and 287 beds per 100,000 residents, respectively).

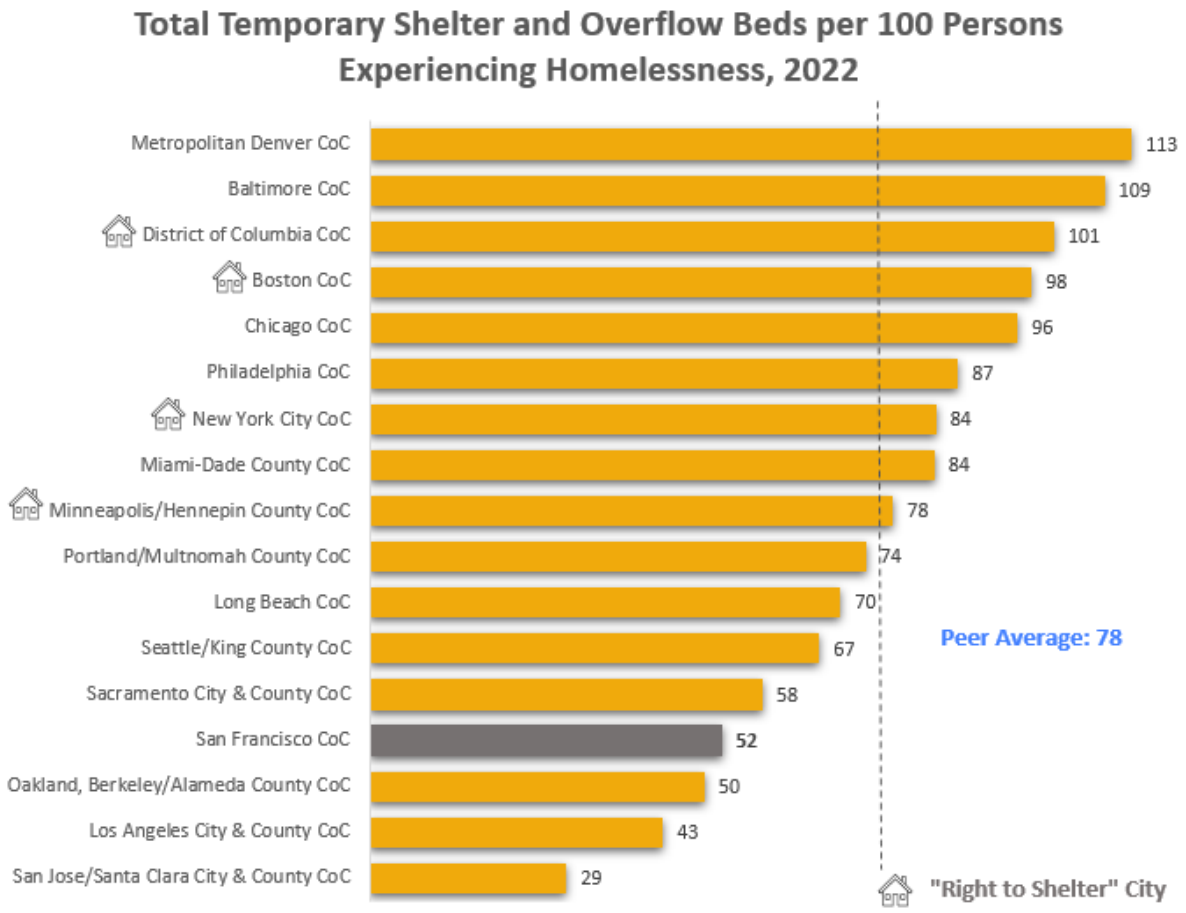


Normalizing Shelter Inventory by the Homeless Population

To compare jurisdictions of varying sizes, this report "normalizes" PIT Count and HIC data against the total population of the jurisdiction. For example, the previous charts in this section display the number of shelter beds per 100,000 residents within the boundaries of the CoC.

This subsection explores a different normalization methodology, comparing Temporary Shelter and Overflow Bed inventory in 2022 to the total homeless population within the CoC jurisdiction as identified via the 2022 PIT Count. This method assesses whether the jurisdiction offers shelter sufficient to meet demand among individuals experiencing homelessness within the CoC.

The chart below shows total Temporary Shelter and Overflow Beds per 100 persons experiencing homelessness in the CoC.[12] While the chart on page 15 shows that San Francisco is above the peer average of 367 Temporary Shelter and Overflow Beds per 100,000 residents, the chart below identifies that **San Francisco offered 52 Temporary Shelter and Overflow Beds per 100 persons experiencing homelessness in 2022**, below the **peer average of 78 beds**.



This method of normalization identifies distinct differences between West Coast jurisdictions and cities in other parts of the country. All eight West Coast CoCs fall below the peer average of 76 beds, while Right to Shelter and other East Coast CoCs meet or even exceed the number of beds needed to fully shelter the individuals counted in the 2022 PIT Count. As seen in the first chart of this report (see page 5), West Coast jurisdictions have significantly higher rates of homelessness than jurisdictions in other parts of the country, and this data shows these CoCs have struggled to supply sufficient shelter beds to meet demand. This variance may be due, in part, to harsher weather conditions among other peers prompting these cities and states to take more immediate action such as passing "Right to Shelter" laws.

[12] Note that the CoC PIT Count data used here differs from city-specific PIT Count data shared in the first section of this report.

However, as noted in the first section of this report, shelter is not the only intervention within most jurisdictions' homelessness response system, and jurisdictions deploy an array of housing, prevention, shelter and other services to respond to the persons experiencing homelessness within their jurisdiction.

HOUSING FOR FORMERLY HOMELESS INDIVIDUALS

Permanent Housing

Housing reported in the HIC is designated for individuals formerly experiencing homelessness. The HIC includes two types of permanent housing: Permanent Supportive Housing (PSH) and Other Permanent Housing (OPH).

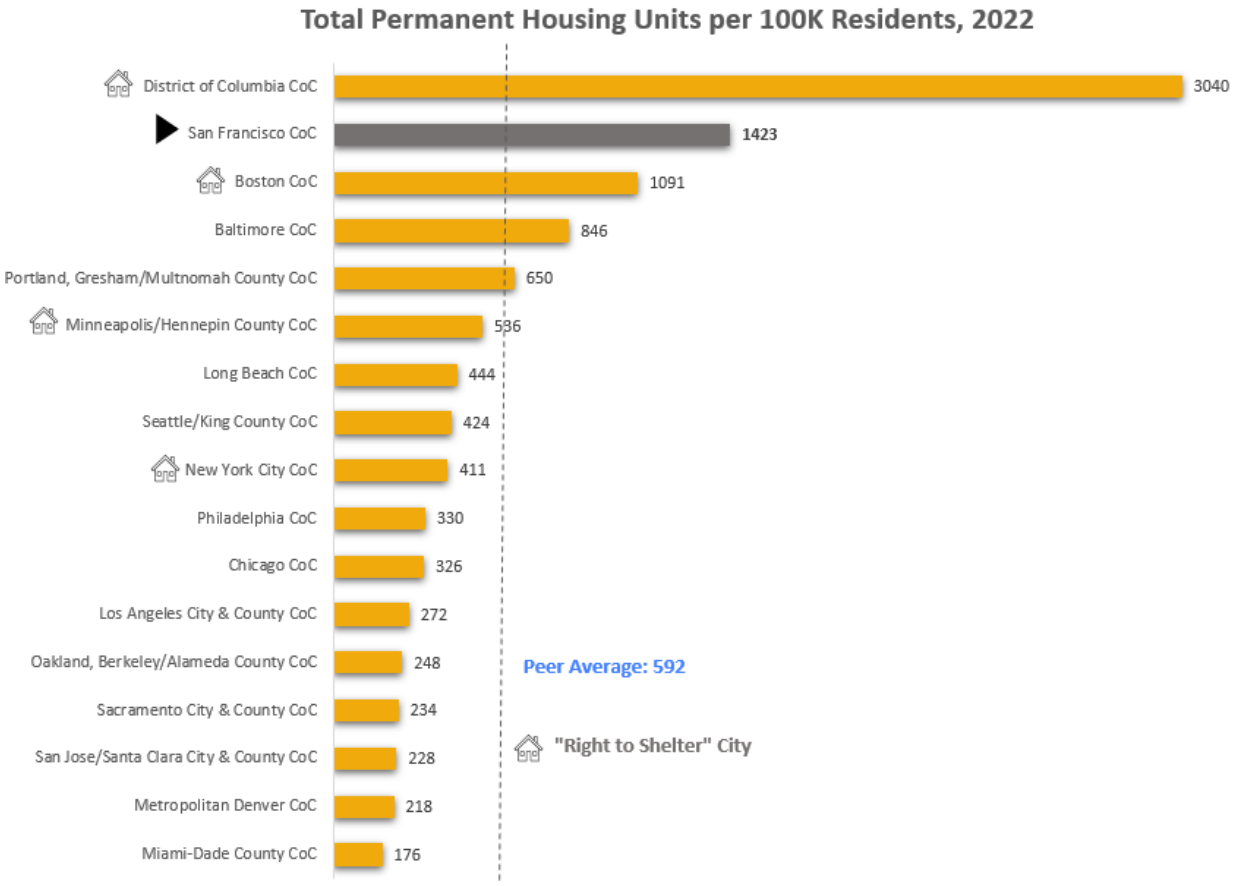
Housing Definitions

Permanent Supportive Housing (PSH): Long-term housing and supportive services for individuals or families experiencing homelessness, in which one member of the household has a disability.

Other Permanent Housing (OPH): Long-term housing for individuals or families experiencing homelessness with or without services and that does not require a member of the household to have a disability.

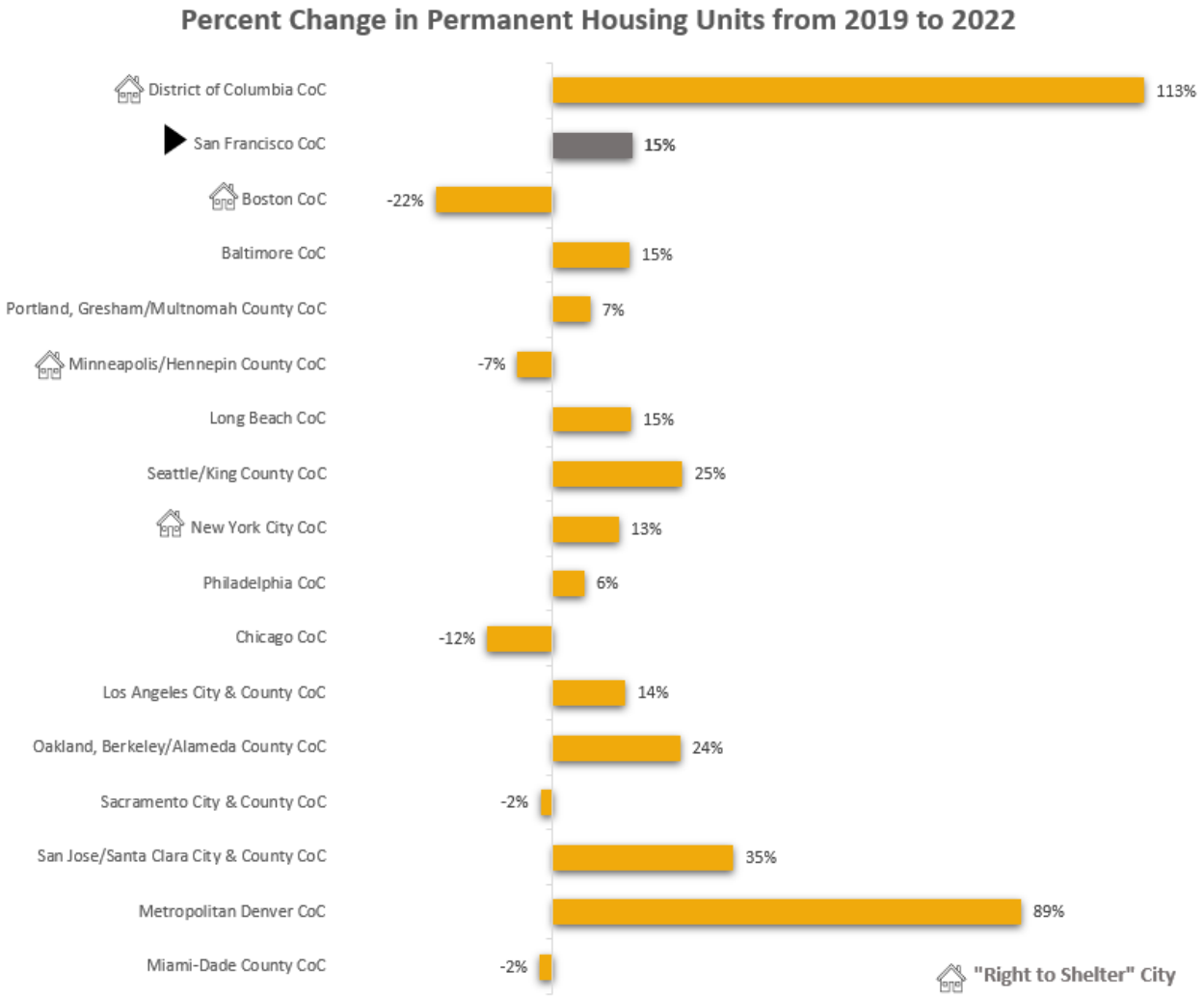
San Francisco offers a variety of both PSH and OPH in its permanent housing portfolio. Since 2019, the San Francisco CoC conducted a data cleaning effort to recode existing housing into the appropriate HUD category, making year-to-year comparisons of permanent housing at the category level difficult. As such, and because PSH and OPH operate similarly within the portfolio of permanent housing options, the charts and data in this section combine PSH and OPH into a single category, called Permanent Housing.

In 2022, the San Francisco CoC reported **1,423 units of Permanent Housing per 100,000 residents**, **more than twice the peer average of 592 units**. The only peer with a larger reported inventory of Permanent Housing was Washington D.C., which had 3,040 units per 100,000 residents.



While New York City CoC provides temporary shelter for many individuals experiencing homelessness as a "Right to Shelter" jurisdiction (84 Temporary and Overflow Beds per 100 persons experiencing homelessness), the jurisdiction's Permanent Housing (PSH and OPH) inventory is limited compared to peers. In 2022, the CoC reported 411 units of Permanent Housing per 100,000 residents (below the peer average of 592). Other "Right to Shelter" jurisdictions (Boston CoC and District of Columbia CoC) offer significantly more housing per 100,000 residents than New York City CoC.

The majority of peer jurisdictions reported an increase in Permanent Housing units per 100,000 residents since 2019. From 2019 to 2022, San Francisco CoC increased its Permanent Housing inventory for individuals formerly experiencing homelessness by 15%.



According to HUD's annual report to Congress in 2022, Other Permament Housing increased by 81% across all communities reporting to HUD, largely reflecting an increase in Emergency Housing Voucher (EHV) funding in many communities.[13] The federal American Rescue Plan Act (ARPA), passed in March 2021, provided $1.1 billion in funding to support EHVs, which can be used to provide permanent housing support to people experiencing homelessness or at risk of homelessness. Other federal grants like the Emergency Solutions Grants provided $4 billion in new, though temporary, funding to support responses to homelessness, including rental assistance, hotels, temporary shelters, and Rapid Rehousing.

[13] The U.S. Department of Housing and Urban Development. (2022). The 2022 Annual Homeless Assessment Report (AHAR) to Congress. https://www.huduser.gov/portal/sites/default/files/pdf/2022-AHAR-Part-1.pdf. P. 79-80

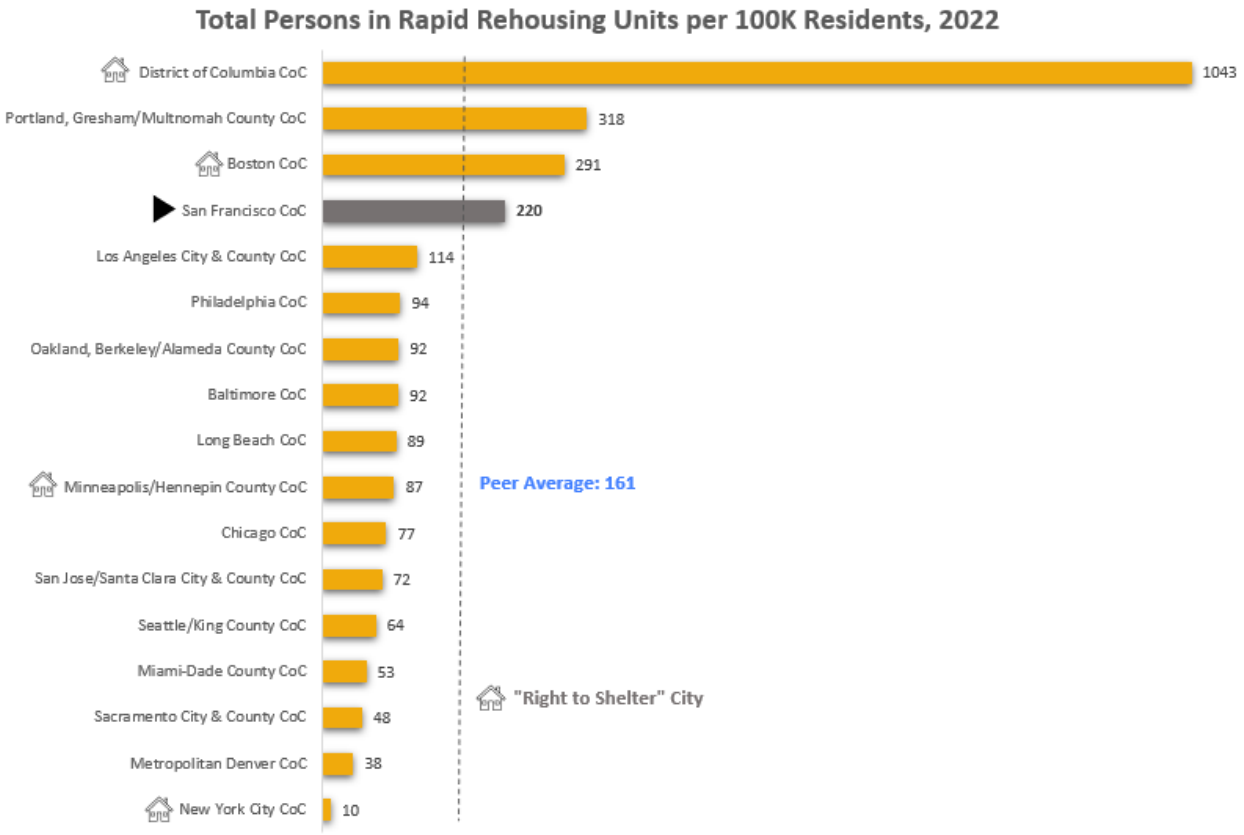
Rapid Rehousing

HUD also requires CoC's to report on other housing inventory, including time-limited housing programs like Rapid Rehousing (RRH).

Housing Definitions

Rapid Rehousing (RRH): Short to medium-term housing assistance, for homeless individuals or families experiencing homelessness with some targeted supportive services. This intervention is designed to support individuals and families who need fewer intensive supports than PSH participants to exit homelessness and return to permanent housing more quickly. RRH subsidies typically have a time limit up to three years.

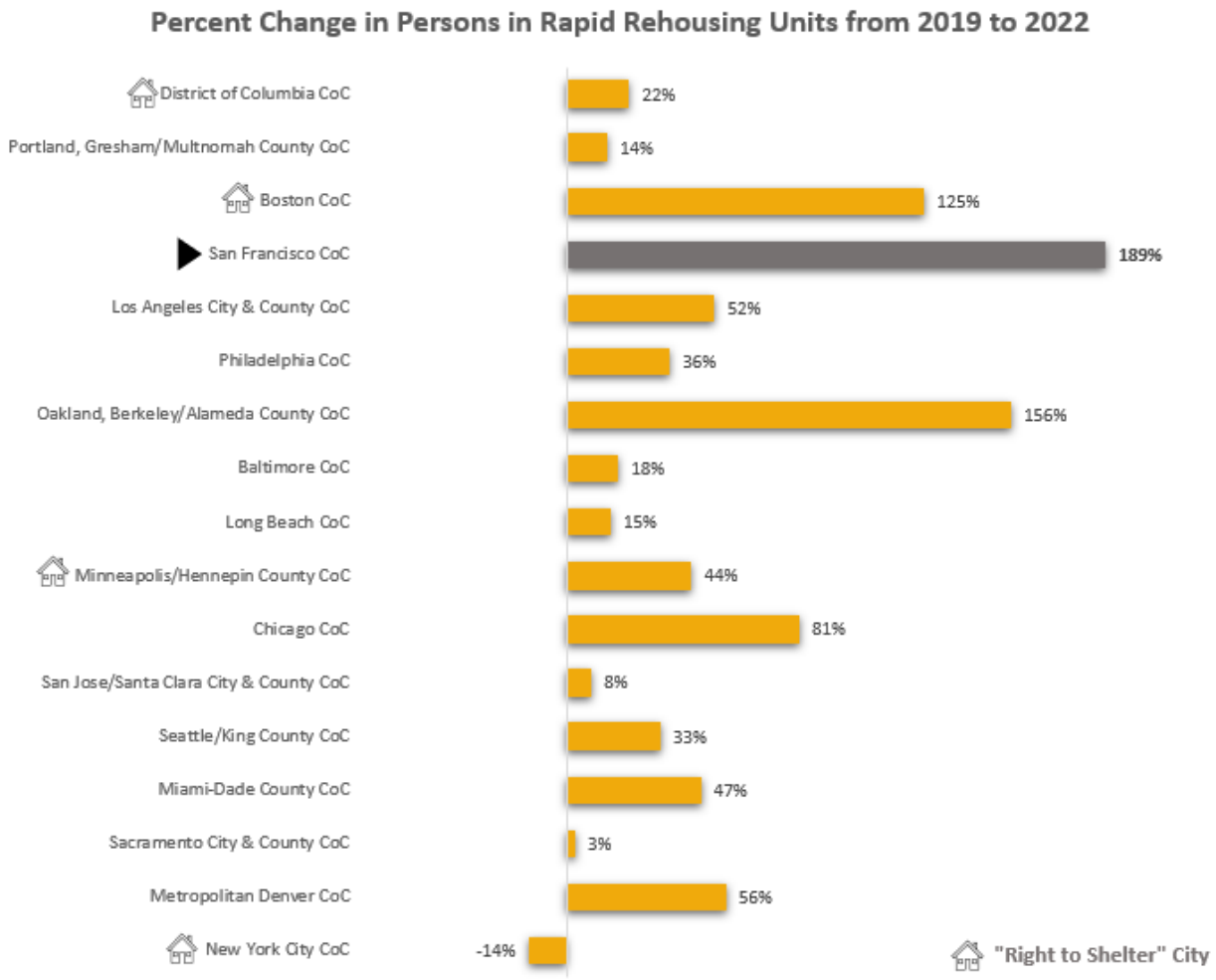
In 2022, San Francisco CoC reported **220 persons in Rapid Rehousing (RRH) Units per 100,000 residents**, higher than the **peer average of 161 RRH units** and fourth among its peers.



As with Permanent Housing, District of Columbia CoC had significantly more RRH units than other peers. Per publications by that jurisdiction, this reflects Washington D.C.'s key strategy of increasing and sustaining support for affordable housing called out in Washington D.C.'s strategic plan on homelessness. In Washington D.C., every family experiencing homelessness has immediate access to

Rapid Rehousing assistance and the strategic plan recommends significantly increasing the stock of Rapid Rehousing units for individuals experiencing homelessness.[14]

San Francisco also increased investment in RRH during the pandemic, which is illustrated in a 189% increase in RRH units between 2019 and 2022, **the highest increase among the peer jurisdictions**. San Francisco first piloted RRH for families in 2018 and subsequently expanded the RRH inventory for transitional-age-youth and adults.



[14] *Interagency Council on Homelessness Strategic Plan FY2021-FY2025.* (n.d.). https://ich.dc.gov/sites/default/files/dc/sites/ich/page_content/attachments/Homeward-DC-Report_FY2021-2025%5B1%5D.pdf

CONSIDERATIONS FOR ADDITIONAL RESEARCH

As prefaced in the Background section of this report, benchmark comparisons provide useful analysis to measure performance of different jurisdictions on complex societal challenges like homelessness. An important limitation of benchmarking analysis is that it may not convey the full context of all the factors impacting homelessness or root causes of the trends and themes highlighted by benchmarking.

New research posits that, controlling for other major variables like poverty, the key driver of homelessness is rent affordability.[15] This may be why cities that have relatively high poverty rates have low rates of homelessness while cities with high rents like San Francisco, New York, Washington D.C., and Seattle have higher rates of homelessness. This includes "Right to Shelter" jurisdictions. A 2018 Zillow report found that **communities where people spend 32% of their income on rent are likely to see exponential increases in homelessness.**[16] Future benchmarking research could incorporate housing cost indicators across peers to help explain variance among jurisdictions.

In addition to the high cost of housing, other major structural factors that impact homelessness include institutionalized racism and economic inequality. See the 2022 Our City, Our Home Oversight Committee Needs Assessment for more information about racism as a root cause of homelessness. An important lens for future research will be to understand race and other demographic characteristics across the homeless population of each jurisdiction. What are the demographic characteristics of each and how might institutional and structural challenges and initiatives within those jurisdictions be driving those local trends? Currently, demographic data is not comprehensively or consistently reported by peer jurisdictions in a way that allows for a benchmarking comparison, though the Controller's Office will explore strategies for highlighting this data in future benchmarking reports.

[15] Colburn, G., and Aldern, C. H. (2022) Homelessness Is a Housing Problem. 1st ed.

[16] Glynn, C., Byrne, T. H., & Culhane, D. P. (2021). Inflection points in community-level homeless rates. *The Annals of Applied Statistics*, 15(2). https://doi.org/10.1214/20-aoas1414

Appendix A: Additional Data by Household Type

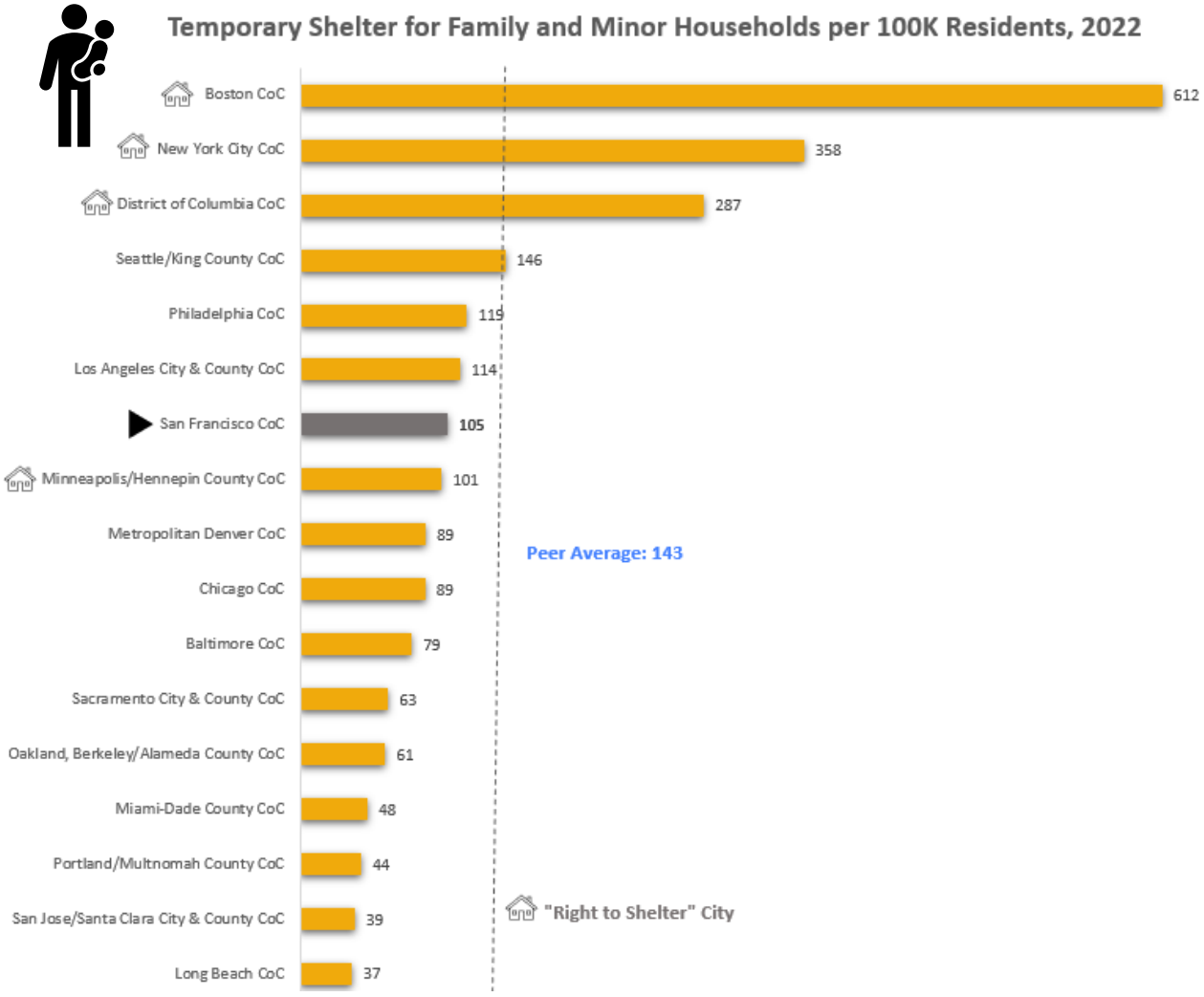
CoCs must report PIT Count and HIC data broken out by household type, including data on households without children, households with children, and unaccompanied youth under age 18. This stratification is integral to appropriately serving persons experiencing homelessness based on unique household composition needs. According to HUD, households with children have different needs, intervention strategies, and outcomes than those without children.

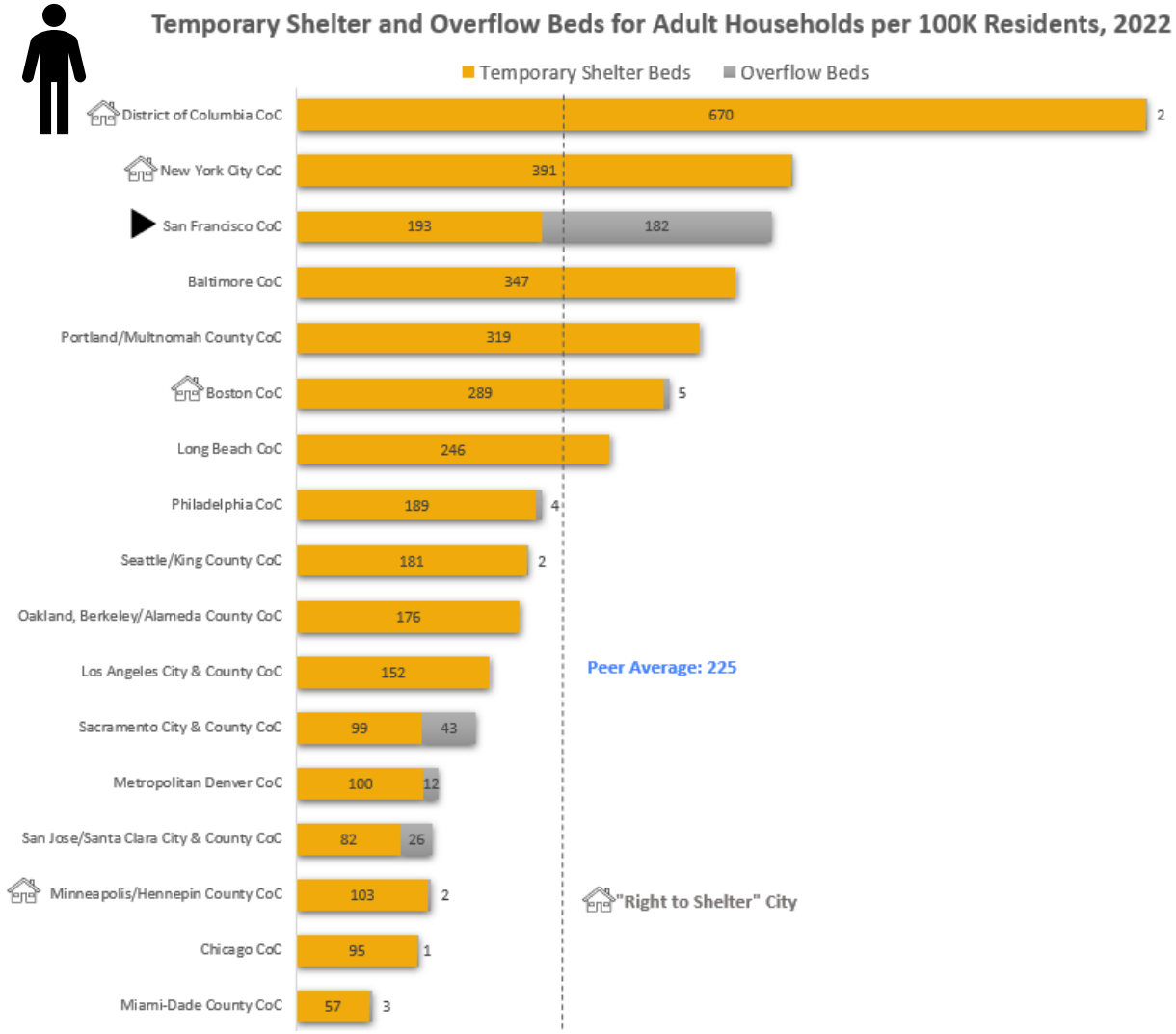
The main body of this report discusses data and shows charts inclusive of individuals from all household types. This Appendix provides shelter and housing inventory data based on household composition. Due to low numbers of households with only minors, the following charts combine households with children and households of only children, and these are labeled as "Family and Minor Households." Households with only adults are labeled "Adult Households." A summary table of the populations included in Adult and Family and Minor Households is provided below.

Adult Households include:	Family and Minor Households include:
Adults (age 25 or older) without minor children in the household	Adults (age 25 or older) with minor children in the household
Transitional Aged Youth (age 18 to 24) without minor children in the household	Transitional Aged Youth (age 18 to 24) with minor children in the household
	Unaccompanied Minors (under age 18)

A. Temporary Shelter and Overflow Beds by Household Composition

This section provides data about Temporary Shelter and Overflow Beds for Adult Households and Family and Minor Households in 2022. Overflow Beds are not disaggregated by household type in available HUD datasets; however, this was an important category to include for an accurate depiction of temporary shelter bed capacity in San Francisco, comprised largely of Shelter in Place (SIP) hotel beds. The San Francisco CoC, which had the largest share of Overflow Beds among peer jurisdictions, indicated that nearly all of the Overflow Beds reported in the 2022 HIC submission were dedicated to Adult Households. As such, all Overflow Beds across peer jurisdictions have been included within the Temporary Shelter and Overflow Beds for Adult Households chart on the next page. Other peer jurisdictions may have offered some of the Overflow Bed capacity to Family and Minor Households, but this cannot be represented with the available data.

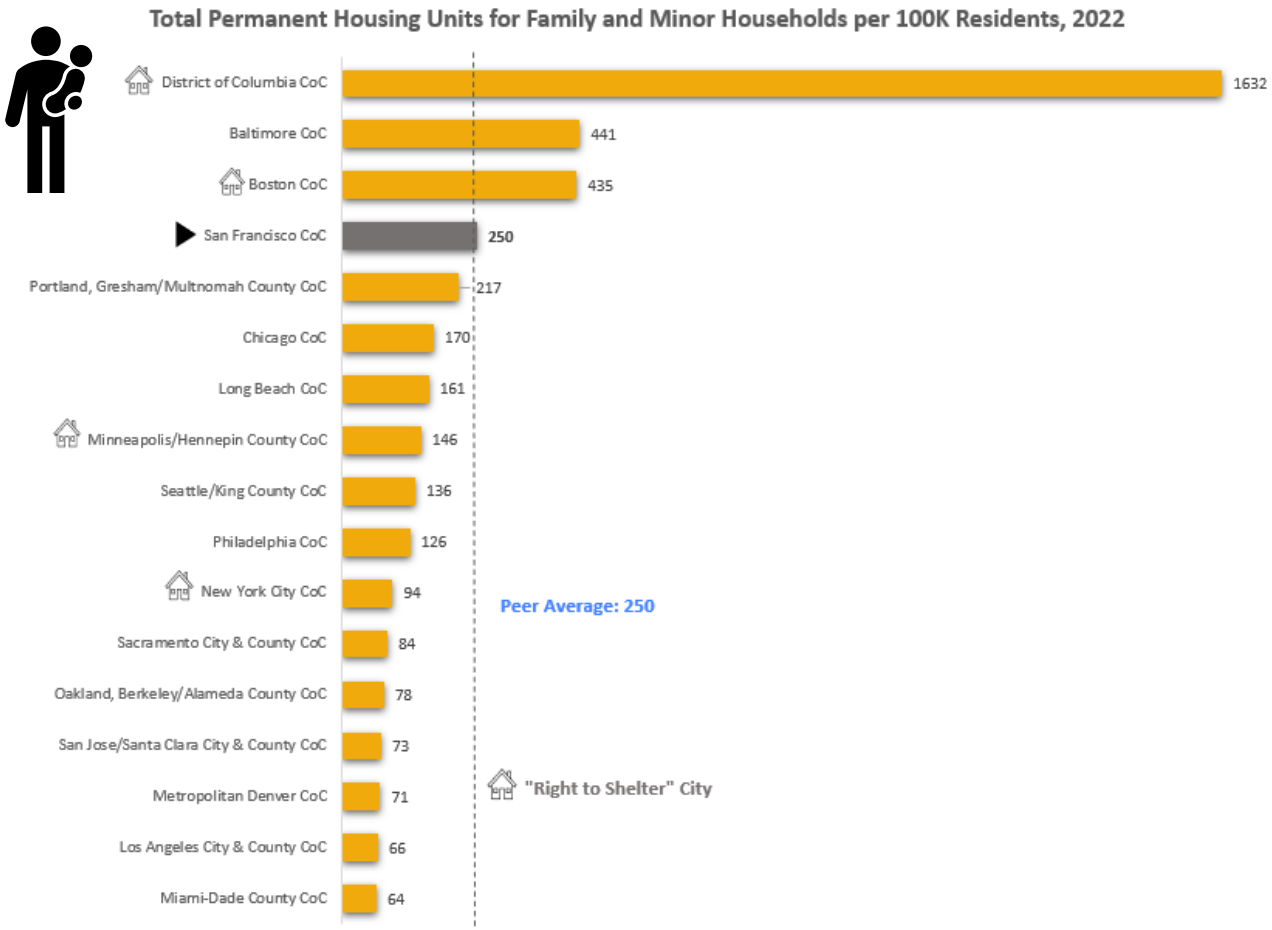


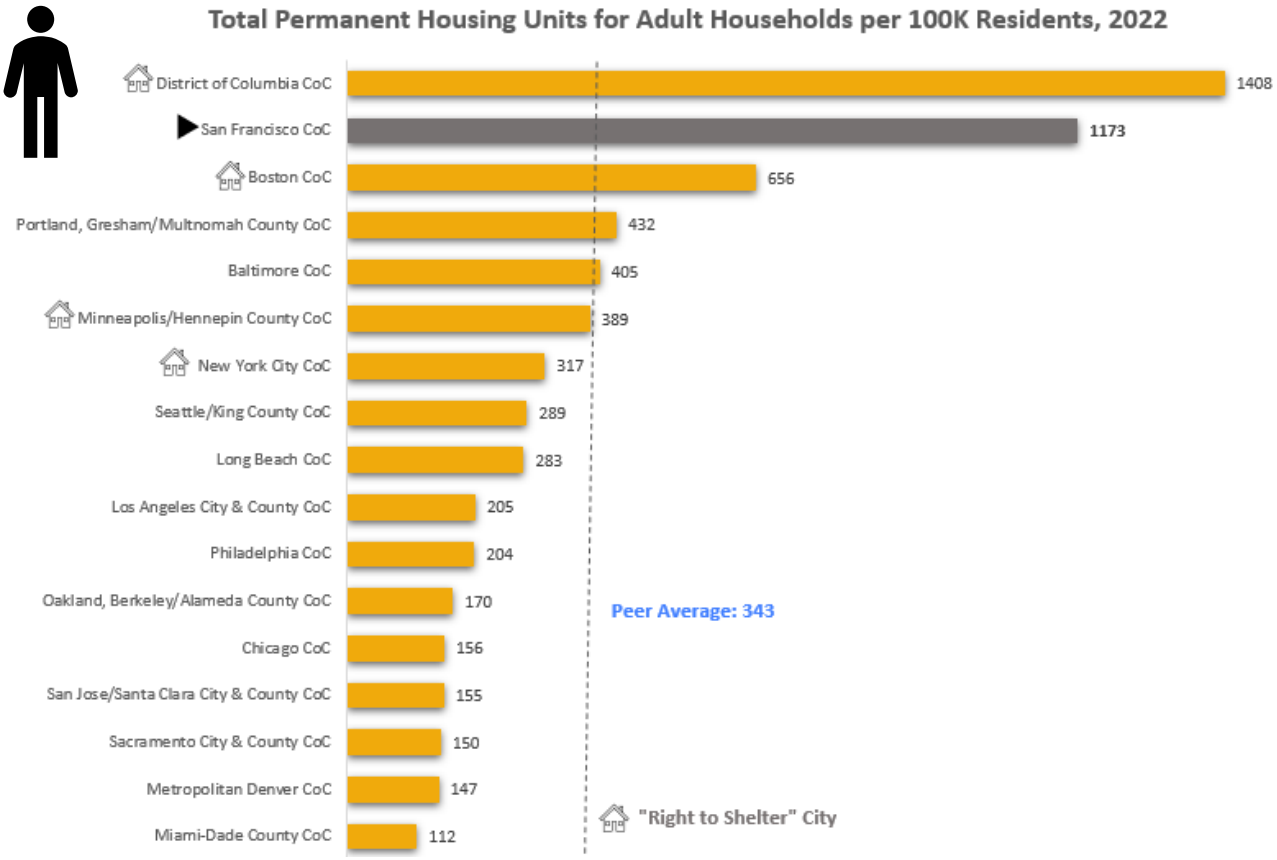

Temporary Shelter and Overflow Beds for Adult Households per 100K Residents, 2022
Temporary Shelter Beds
Overflow Beds
District of Columbia CoC
670
2
New York City CoC
391
San Francisco CoC
193
182
Baltimore CoC
347
Portland/Multnomah County CoC
319
Boston CoC
289
5
Long Beach CoC
246
Philadelphia CoC
189
4
Seattle/King County CoC
181
2
Oakland, Berkeley/Alameda County CoC
176
Los Angeles City & County CoC
152
Peer Average: 225
Sacramento City & County CoC
99
43
Metropolitan Denver CoC
100
12
San Jose/Santa Clara City & County CoC
82
26
Minneapolis/Hennepin County CoC
103
2
"Right to Shelter" City
Chicago CoC
95
1
Miami-Dade County CoC
57
3

Section 2: Housing for Formerly Homeless Individuals by Household Composition

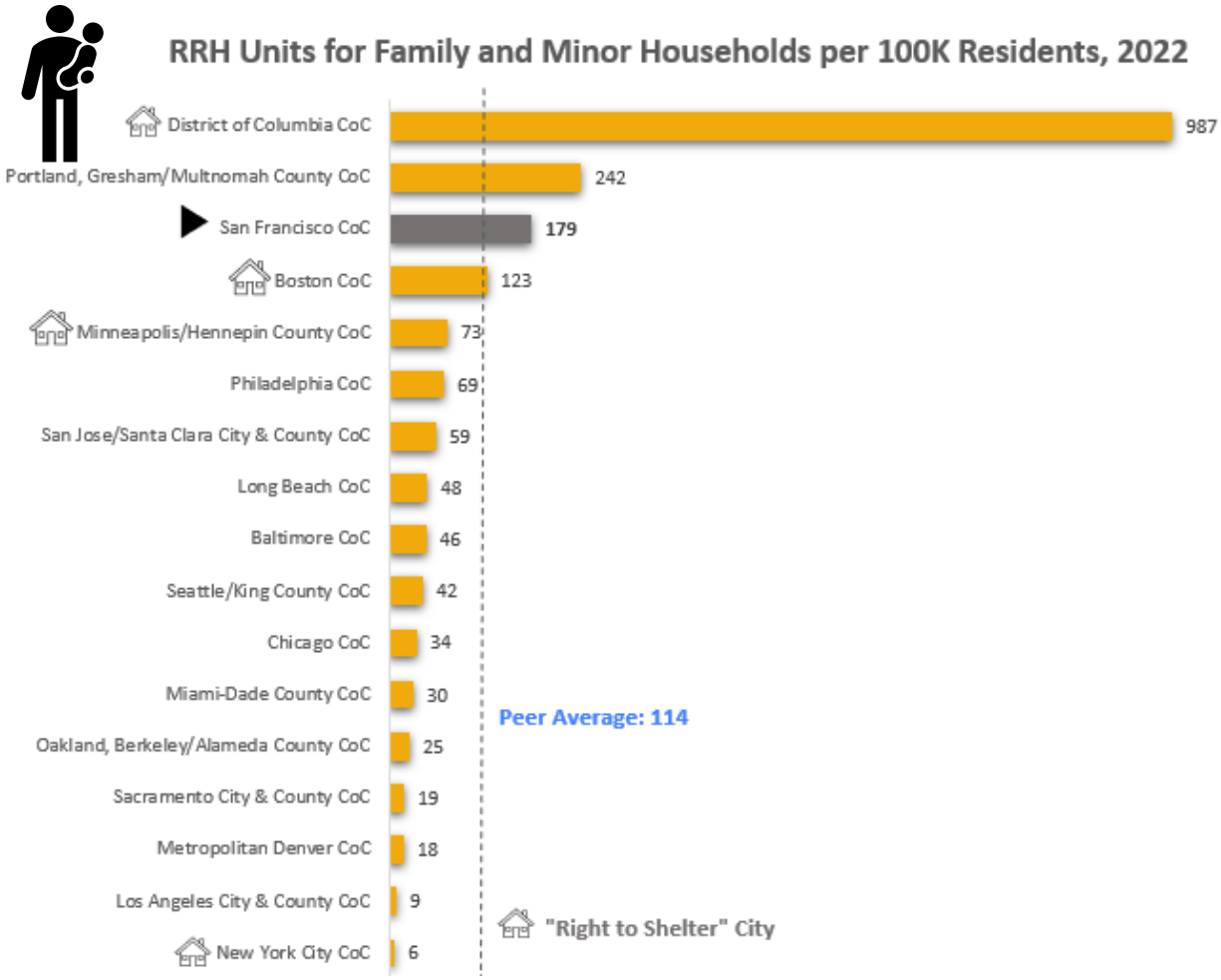
This section provides data about Permanent Housing (including both PSH and OPH categories) and Rapid Rehousing for Adult Households and Family and Minor Households in 2022.

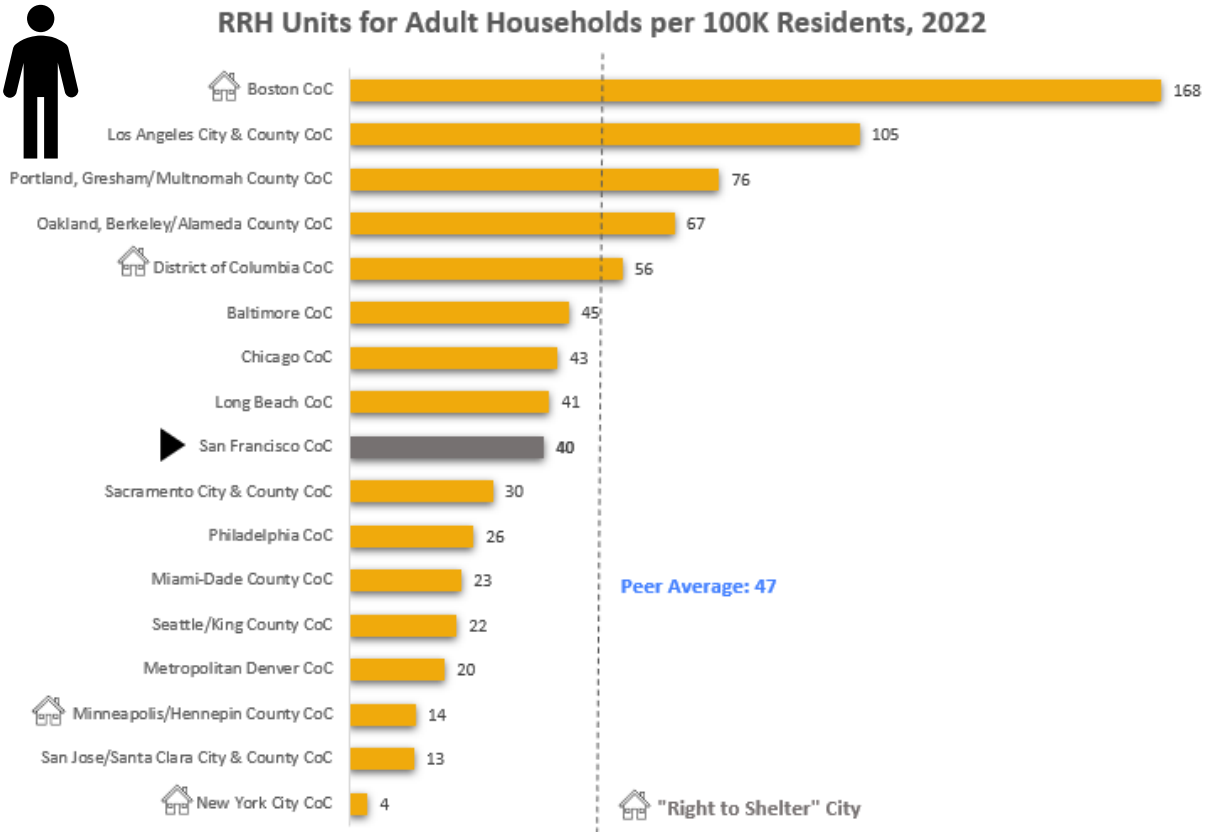
Permanent Housing




Total Permanent Housing Units for Adult Households per 100K Residents, 2022
District of Columbia CoC
1408
San Francisco CoC
1173
Boston CoC
656
Portland, Gresham/Multnomah County CoC
432
Baltimore CoC
405
Minneapolis/Hennepin County CoC
389
New York City CoC
317
Seattle/King County CoC
289
Long Beach CoC
283
Los Angeles City & County CoC
205
Philadelphia CoC
204
Oakland, Berkeley/Alameda County CoC
170
Chicago CoC
156
San Jose/Santa Clara City & County CoC
155
Sacramento City & County CoC
150
Metropolitan Denver CoC
147
Miami-Dade County CoC
112
Peer Average: 343
"Right to Shelter" City

Rapid Rehousing




RRH Units for Adult Households per 100K Residents, 2022
Boston CoC
168
Los Angeles City & County CoC
105
Portland, Gresham/Multnomah County CoC
76
Oakland, Berkeley/Alameda County CoC
67
District of Columbia CoC
56
Baltimore CoC
45
Chicago CoC
43
Long Beach CoC
41
San Francisco CoC
40
Sacramento City & County CoC
30
Philadelphia CoC
26
Miami-Dade County CoC
23
Seattle/King County CoC
22
Metropolitan Denver CoC
20
Minneapolis/Hennepin County CoC
14
San Jose/Santa Clara City & County CoC
13
New York City CoC
4
Peer Average: 47
"Right to Shelter" City

Appendix B: Methodology

Benchmark comparisons are not always apples-to-apples, and in this report, the Point in Time (PIT) Count analysis includes comparisons between cities and Continuums of Care (CoC). A CoC is a regional or local planning body that coordinates housing and services funding for homeless families and individuals. CoCs also represent a service area that may map to a city or county but may not have the same resident population by which to normalize data. The HIC and PIT Count analysis uses normalized data from 2019 and 2022 by comparing to resident populations from the 2020 Decennial Census. Notably, resident populations in some major urban cities experienced population decreases between 2020 and 2021, with the greatest percent losses in San Francisco and other peer cities including New York, Washington D.C., and Boston.[17]

Additionally, homelessness counts, specifically PIT Counts have known methodological challenges. They are implemented and managed within each city's unique constraints and may not count individuals doubled up with other households, sleeping in their cars, or otherwise not in plain view on the street or in shelter.

The data in this report is from a variety of open, public data sources, including PIT Counts published by each peer and U.S. Department of Housing and Urban Development (HUD) reports for CoCs.

The report calculates a peer average for each measure that excludes San Francisco. While a peer average provides a helpful gauge for comparing the peer jurisdictions, peer averages may be skewed by extreme, very low or very high, values. Where there were clearly present outliers, the report provides median figures or offers a peer average excluding the main outliers (e.g., excluding "Right to Shelter" cities from the peer average for total count of Temporary Shelter and Overflow Beds per 100,000 residents, 2022). Data Notes: PIT Count Analysis

The PIT Count analysis examines several priority populations, including persons experiencing chronic homeless or who identify as individuals in families, veterans, or transitional-age-youth (ages 18-24) experiencing homelessness. While HUD requires reporting on all of these subgroups, not all city-published PIT Counts include this information. The table below shows which peer jurisdictions did not report on these priority populations in their 2022 PIT Count reports and were thus excluded from respective charts.

[17] Frey, W. H. (2022, July 11). Big cities saw historic population losses while suburban growth declined during the pandemic. Brookings. https://www.brookings.edu/research/big-cities-saw-historic-population-losses-while-suburban-growth-declined-during-the-pandemic/#:~:text=The%20pandemic%20began%20to%20affect

Priority Population	Peer Jurisdiction(s) Not Reporting on Priority Populations in 2022 PIT Count Data
Persons Experiencing Chronic Homelessness	Boston, Denver, Miami-Dade CoC
Persons in Families Experiencing Homelessness	Long Beach, Miami-Dade CoC
Veterans Experiencing Homelessness	Denver, Minneapolis/Hennepin County CoC, Philadelphia
Youth Experiencing Homelessness	Long Beach

Other data notes for the PIT Count analysis include the following caveats:

- New York was excluded from the PIT Count analysis because it did not conduct a count of sheltered homelessness in its 2022 city PIT Count, nor did the peer city collect demographic data on priority populations. However, New York CoC data is included in the HIC analysis.
- The King County CoC, which includes Seattle, WA, did not conduct a 2022 PIT Count and thus is excluded from the PIT Count analysis. This jurisdiction received approval from HUD to conduct its 2022 unsheltered count through Respondent Driven Sampling (qualitative interviews), a separate methodology to the traditional "blitz" approach and sample survey methods used by most jurisdictions for their PIT Counts.
- Portland/Gresham/Multnomah County CoC included individuals in families experiencing homelessness and individuals in families registered with Coordinated Entry in its 2022 PIT Count, which that CoC had not done in 2019. The 2022 PIT Count report for that CoC states that this is likely to produce an undercount of persons experiencing homelessness in families in 2019 and an overcount in 2021, stating that homeless families registered with Coordinated Entry may not have been experiencing unsheltered homelessness on the same day as the count.

DATA NOTES: HIC ANALYSIS

The Housing Inventory Count (HIC) Analysis uses data provided by CoC's to HUD within structured spreadsheets. For this benchmarking analysis, we examined total year-round beds, which include beds of households with children, beds of households without children, and beds of households with only children. This count excludes Seasonal Beds, including beds only open during wet weather or winter months. The total beds provided in this report may differ from those reported to HUD, which include Seasonal Beds. This report includes a count of Overflow Beds alongside Temporary Shelter Beds to better capture how San Francisco and other peers may have categorized COVID-19 interventions like "Shelter-in-Place" Hotels. San Francisco began winding down its COVID-19 shelter interventions in June 2021, with this process continuing into 2022, and appearing in the 2022 HIC report.

As noted in the Overview Section of this report, HUD did not require that communities and CoCs standardize categorization of pandemic-related shelter and housing initiatives. For example, Los Angeles City and County CoC categorized its COVID-19 emergency shelter, like Project Roomkey

converted motel sites, as Seasonal Beds so there is likely a significant undercount of shelter inventory for Los Angeles CoC within this report.

The HIC analysis includes counts of beds in the current inventory and not those listed under as under development, meaning these beds were available for occupancy the day of the annual Point-in-Time Count. Beds and units that are under development have been fully funded but are not yet available for occupancy on the night of the CoC's PIT Count. CoCs listing beds that are under development must also identify whether the bed or unit is expected to be available for occupancy 12 months from the night of the CoC's PIT Count.[18]

Throughout the report and Appendix A, data on beds for households with children and households with only children are combined and labeled "Family and Minor Households." Households with only children represent unaccompanied minors and typically make up a small portion of total persons experiencing homelessness.

Rapid Rehousing data in the HIC represents a count of people currently using a Rapid Rehousing subsidy, while Permanent Housing data represent count of beds.

[18] U.S. Department of Housing and Urban Development Community Planning and Development (2022). 2023 HIC and PIT Data Collection Notice. https://www.hud.gov/sites/dfiles/CPD/documents/2022_HIC_and_PIT_Data_Collection_Notice.pdf. P. 14