

Scoring Form Completion Guide

Purpose: This guide provides a concise process for completing the scoring form accurately, consistently, and in a manner suitable for internal review and submission readiness.

Enter data only in the input tab, allow the workbook to calculate results automatically, and review the summary tab before submission.

Complete the Form

1. Open the **Renewal Cover Sheet** tab. Enter application data on this tab.
2. Open the **Dual PSH-RRH (2yr)** tab. Enter data only on this tab.
3. In cell **C4**, verify the correct program type: **PSH** or **RRH**. If incorrect, update the **Renewal Cover Sheet**.
4. **Enter Year 1 and Year 2 values** only pulling the data directly from Sage.
5. Complete all required metrics: **Utilization, Positive Housing, Income Increase – Stayers, Income Increase – Leavers, and Funds Drawn for both years**.
6. Verify that both years' values are accurate before finalizing.
7. Review the **Submission Summary** tab to confirm the total score, performance tier, and trend indicators before submission.

Before You Begin

- Confirm whether the project is **PSH** or **RRH**.
- Gather Year 1 and Year 2 performance values from Sage. Instructions are provided.
- Confirm that both years cover the same reporting period.
- Be prepared to review low scores before submission.

Final Review

- Program type in cell C4 on the **Dual PSH-RRH (2yr)** tab is correct.
- All required Year 1 and Year 2 values are entered.
- No formula cells were overwritten. Should be locked.
- The Submission Summary tab was reviewed before submission.

The detailed guidance below provides additional instructions for completing and using the workbook, including the Dual PSH/RRH worksheet, two-year weighted scoring approach,

and Submission Summary tab. It is intended to support accurate data entry, score interpretation, and submission preparation.

Note: The performance score is calculated on a 100-point scale. For the full renewal application, 70% of that score is applied, allowing for a maximum of 70 performance points.

Overview

This workbook is designed to support consistent performance scoring, apply the appropriate PSH or RRH thresholds, combine two years of data with greater weight on the most recent year, and present a summary suitable for review and submission.

- This workbook calculates performance scores using HUD-aligned metrics.
- It combines two years of data with greater weight assigned to the most recent year.
- It applies the correct PSH or RRH thresholds automatically based on the program type selected.
- It generates a summary suitable for internal review and NOFO submission preparation.

Step 1: Enter all Data on the Renewal Cover Sheet.

In the Renewal Cover Sheet tab, enter all application information requested. Ensure that the HUD audit threshold questions are answered. If required, you may be flagged to provide an explanation addressing any HUD concerns.

Ensure both the Agency Director and Agency CoC Project Manager signs the Renewal Cover Sheet.

Set the Program Type – Important Step for accurate scoring.

In the Renewal Cover Sheet tab, go to cell **C11** and enter the applicable program type.

Why this matters: The program type determines which HUD-aligned thresholds the workbook applies during scoring.

Once the program type is entered, the workbook automatically applies the appropriate HUD targets for the income-related measures shown below.

Metric	PSH Target	RRH Target
Income Increase	20%	53%
Non-cash income	54%	54%

- PSH: 20% earned income threshold.
- RRH: 53% earned income threshold.

Step 2: Enter Data in the Dual PSH-RRH (2yr) Tab

Enter Yearly Performance Data

For each required metric, enter values for both Year 1 and Year 2 using the appropriate Sage or HMIS performance reports. All other values are locked for scoring.

Column	What to enter
Year 1	Prior year (e.g., 2024)
Year 2	Most recent year (e.g., 2025)

Metrics you must fill in:

- Utilization.
- Positive Housing.
- Income Increase – Stayers.
- Income Increase – Leavers.
- Funds Drawn.

Use Approved Data Sources

Use Sage performance reports to obtain the required values before entering them into the workbook. These measures align with standard HMIS and APR performance measures defined by HUD.

Step 3: Review Results in the Submission Summary Tab

This tab is **fully automated**.

Key Outputs

- Program type.
- Total score.
- Performance tier. *Note, this is not used for determining projects for CoC prioritization Tiers to HUD. This is to assist evaluators when reviewing overall scores.*

Performance Tiers

Score	Meaning
90–100	High Performing
70–89	Moderate
<70	At Risk

Key Metrics Table

This table displays each metric, its final score, and the corresponding trend indicator.

- Each metric.
- Final score.
- Trend indicator.

Risk Interpretation

You should review:

- Any score **<70**.
- Any metric with one of the following indicators:
 - Declining.
 - Stable but low.

These conditions should be treated as potential NOFO risk factors and reviewed before submission.

Key Calculation Notes

Two-Year Weighted Average

The **Combined Actual** column calculates a two-year weighted average using the following formula:

Formula: $= (\text{Year1} \times 0.4) + (\text{Year2} \times 0.6)$

Rationale: This approach places greater emphasis on recent performance while still accounting for prior-year results.

- Emphasizes recent performance.
- Still accounts for past performance.
- Matches how reviewers interpret trends.

Automatic Target Selection

The **Target** column applies the correct threshold automatically based on the program type selected in cell C11.

Formula example: $=\text{IF}(\$C\$11=\text{"PSH"}, 0.20, 0.53)$

This calculation helps ensure the correct HUD thresholds are applied and reduces the risk of PSH/RRH scoring errors.

- Correct HUD thresholds are applied.
- Prevents PSH/RRH scoring mistakes.

Score Calculation

The **Score (%)** column compares the combined actual result to the target using the formula below.

Formula: $=\text{MIN}(\text{Combined Actual} / \text{Target}, 1) * 100$

Scoring rule: Scores are capped at 100. Performance above the target does not increase the score beyond the maximum value.

- Scores are capped at 100.
- Performance above target does not inflate the score.

Weighted Score

Formula: = Score × Weight

Standard weights used:

Metric	Weight
Positive Housing	30%
Utilization	20%
Income (Stayers)	15%
Income (Leavers)	15%
Funds Drawn	20%

Total Score

Formula: = SUM(all weighted scores)

The final result is a performance score on a 0 to 100 scale.

Trend Indicator

Column: Trend

Formula: =IF(Year2 > Year1, "Improving", "Declining/Stable")

Purpose: The trend indicator shows whether performance improved between Year 1 and Year 2 and supports interpretation of overall results.

- Shows performance trajectory.
- Supports justification of improvements in the NOFO narrative.

Note: The performance score is calculated on a 100-point scale. For the full renewal application, 70% of that score is applied, allowing for a maximum of 70 performance points.