As submitted by Dr. Shauntina Sorrells, Chief Program Officer, Samueli Foundation

Business Calendar
Agenda Item 6

Date: November 19, 2025

Subject: Orange County Coordinated Entry System (CES) Evaluation

Recommended Actions

a. Update on the Orange County CES Evaluation.
b. Authorize the Office of Care Coordination, as the CES Lead and CoC Administrative Entity, and Orange County United Way, as the HMIS Lead, to work with the selected consultant and provide all needed, relevant data to carry out the Orange County CES evaluation.
c. Approve the final report and summary of the Orange County CES Evaluation be presented to the CoC Board.

Background and Analysis

In alignment with **HUD's Coordinated Entry (CE) Notice, CPD-17-01**, the **Orange County Continuum of Care (CoC)** is required to conduct an **annual evaluation** of the CES to ensure that the system equitably, efficiently, and effectively connects people experiencing homelessness to housing and services.

In October 2025, the CoC released a **Request for Information (RFI)** seeking qualified consultants or agencies to conduct this evaluation. A total of **eight proposals** were received. The review committee, composed of system leaders, evaluation experts, and community partners, includes:

- **Dr. Shauntina Sorrells**, Chair, Orange County CoC Board; Chief Program Officer, Samueli Foundation
- **Nishtha Mohendra**, Vice Chair, Orange County CoC Board; Executive Director, Families Forward
- **Aubrey Sitler**, Strategic Plan Manager; Orange County CoC Consultant
- **Angela Reilly**, Program Manager, Samueli Foundation; former Director of Compliance for a CES-participating nonprofit organization
- **Two senior consultants from The Bridgespan Group**, serving as external reviewers

The **CoC Administrative Entity** and **CES Administrative Entity (County of Orange)** abstained from participation to maintain objectivity, as both will be evaluated under the scope of this process.

The review committee applied the **CES Evaluation Rubric**, which emphasizes stakeholder engagement, equity, and local systems understanding. Evaluators met to review all submissions, discuss qualitative and quantitative scores, and reach consensus on the top-rated firm.

After reviewing eight proposals, committee scoring, and follow-up clarifying questions, the CES Evaluation Review Committee has selected **Element Consulting Group** as the recommended consultant for the **Annual Evaluation of the Orange County Coordinated Entry System (CES)**. Additionally, **Orange County United Way (Sue Parks)** will be the **contract holder**, supported by a Samueli Foundation grant. The committee was able to identify the **recommended consultant by November 10, 2025**, with a **contract execution and project kickoff anticipated in early December**. The Element Consulting Group will hold a kickoff meeting within two

weeks of contract execution and submit an evaluation plan within 30 days. The CES Evaluation Review Committee highlighted key points about Element Consulting Group's approach that align with the approach to the CES Evaluation, including:

1. Strong **stakeholder engagement**, including lived experts, providers across the system, and cross-system partners
2. A clear **equity lens** and focus on how CES functions for different populations and SPAs
3. Coordination with the new **Homebase fiscal/resource mapping** work so we don't duplicate gap/fiscal analysis
4. Actionable recommendations for CES policies, governance, and operations that can return to the CoC Board

Evaluation Process

Each reviewer independently scored all proposals using the **2025 CES Evaluation Rubric**, which weighted **stakeholder engagement** and **local systems understanding** most heavily.

Scores and qualitative notes were then discussed in a facilitated review session to ensure alignment and consistency. The committee reached consensus on overall ratings, identified each firm's strengths and differentiators, and determined a top-rated consultant.

Next Steps and Timeline

A small, CoC-aligned group (including County/CoC representation, lived experience, providers, and the Samueli Foundation) will help guide the workplan and use of findings. Next steps are outlined below.

- **Board update:** November 19, 2025
- **Contract execution:** Early December 2025
- **Kick-off meeting:** Within 2 weeks of contract
- **Evaluation plan submitted:** January 2026

This transparent process ensures that the CoC's CES Evaluation reflects broad stakeholder input and aligns with the system's goals for equity, accountability, and continuous improvement.

Attachments

- Attachment A – CES Evaluation Rubric
- Attachment B – List of Proposals Received

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Orange County CoC CES Evaluation Proposal Review Rubric

To ensure fair and consistent review of proposals submitted in response to the 2025 Orange County Continuum of Care (CoC) CES Evaluation RFI, this rubric provides structured criteria and scoring guidance for the selection committee.

Scoring Scale

Score	Definition
5	Excellent – Fully meets and exceeds expectations; clear, detailed, and compelling
4	Strong – Meets all expectations with minor gaps
3	Adequate – Meets most expectations; some details unclear or limited
2	Weak – Significant gaps or unclear approach
1	Poor – Does not address the requirement

Evaluation Criteria and Scoring

1. Understanding of Purpose & Scope (15 points)

Demonstrates clear understanding of the Orange County CoC's CES, HUD evaluation requirements, and intended outcomes. Identifies key challenges and opportunities in CES evaluation and proposes a relevant, realistic approach. Shows awareness of Orange County's local context, demographics, and system complexity.

Reviewer Score (1–5)	Comments / Notes

2. Evaluation Design & Methodology (25 points)

Presents a well-structured evaluation plan consistent with HUD's CPD-17-01 and the Coordinated Entry Management and Data Guide. Integrates both qualitative and quantitative methods (surveys, focus groups, HMIS data, etc.). Specifies indicators, data sources, and analysis strategies aligned with the four core HUD evaluation questions. Includes a feasible timeline, milestones, and deliverables within the 12-month project window.

Reviewer Score (1–5)	Comments / Notes

3. Stakeholder Engagement Plan (25 points)

Clearly articulates how the consultant will engage and coordinate with the Office of Care Coordination, CES Lead and Committee, HMIS Lead, providers, and lived experts. Demonstrates inclusive and culturally responsive engagement strategies that reflect Orange County's demographic diversity. Details frequency, structure, and quality measures for stakeholder engagement (e.g., meeting cadence, feedback loops). Shows how stakeholder input will inform findings and recommendations.

Reviewer Score (1–5)	Comments / Notes

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4. Experience & Qualifications (20 points)

Demonstrates prior experience conducting CES or similar CoC evaluations. Shows strong understanding of HUD frameworks, performance measures, and CoC operations. Includes staff bios or narratives illustrating relevant technical and project management expertise. Highlights successful examples or samples of similar deliverables.

Reviewer Score (1–5)	Comments / Notes

5. Budget & Cost Reasonableness (15 points)

Budget aligns with proposed scope and deliverables. Cost drivers and billing rates are clearly explained. Budget reflects efficient use of resources (staff, travel, incentives, etc.) within the up-to-$250,000 range. Proposal demonstrates flexibility and transparency in pricing structure (fixed price or time & materials).

Reviewer Score (1–5)	Comments / Notes

Total Score Summary

Criterion	Weight	Weighted Score
1. Understanding of Purpose & Scope	15	
2. Evaluation Design & Methodology	25	
3. Stakeholder Engagement Plan	25	
4. Experience & Qualifications	20	
5. Budget & Cost Reasonableness	15	

Total Possible Points: 100

Name of Proposal/Organization:

Name of the Evaluator:

Attachment B – List of Proposals Received

The Samueli Foundation received **eight proposals** in response to the **2025 CES Evaluation Request for Information (RFI)** released in October 2025.

Each proposal was reviewed by the evaluation committee using the CES Evaluation Rubric.

Organization / Lead Firm	Overview / Notes
CSH – Corporation for Supportive Housing	National leader in housing systems evaluation; extensive Orange County and California presence; strong stakeholder engagement plan with lived-experience stipends.
Abt Global	National HUD TA provider; robust methodology and multilingual engagement capacity; strong focus on data analysis and equity outcomes.
Homebase	Experienced CES evaluation partner; emphasizes policy alignment and field-based data collection; trauma-informed methods.
Focus Strategies	Data-driven consultant team; mixed-method evaluation design; includes structured engagement with providers and CoC partners.
Element Consulting Group (ECG)	National firm with government systems experience; offers phased evaluation and qualitative engagement approach.
Informed by Data (IBD)	Regional analytics and evaluation firm; proposes structured data validation and advisory group model.
Julie McFarland Consulting LLC	Consultant with deep CES implementation experience; centers evaluation in lived expertise and qualitative storytelling.
Cleveland/Cuyahoga Model Proposal (Housing Innovations)	Comparative CES framework informed by peer community model; focuses on system learning and benchmarking.

Summary:

All eight proposals met the RFI's minimum eligibility requirements.

The evaluation committee applied consistent scoring criteria to identify the top-rated consultant best positioned to conduct the Orange County CES Evaluation in alignment with HUD and CoC priorities.

Orange County CES Evaluation

Dr. Shauntina Sorrells, Chief Program Officer,
Samueli Foundation

Business Calendar – Item #6

Orange County CES Evaluation – CoC Board Update

Purpose

- Annual HUD-required evaluation (Notice CPD-17-01)
- Assess system equity, efficiency, and effectiveness

Process

- Request for Information (RFI) released: October 2025; 8 proposals received
- Review Committee: CoC leadership, Strategic Plan staff, external reviewers
- County (CoC & CES Admin) abstained to maintain impartiality

Evaluation Focus

- Stakeholder engagement
- Local systems understanding
- Continuous improvement

Timeline

- Consultant identified: Element Consulting Group
- Contract execution: Early December 2025
- Kickoff meeting: Within 2 weeks of contract
- Evaluation plan submitted: January 2026

Thank you for your continued partnership as we move into this important phase of learning and system improvement.

Business Calendar – Item #6

Orange County CES Evaluation – CoC Board Update

- After reviewing eight proposals, committee scoring, and follow-up clarifying questions, the CES Evaluation Review Committee has selected Element Consulting Group as the recommended consultant for the Annual Evaluation of the Orange County Coordinated Entry System (CES).
- The CES Evaluation Review Committee will be moving forward with Orange County United Way (Sue Parks) as the contract holder, supported by a Samueli Foundation grant. A small, CoC-aligned group (including County/CoC representation, lived experience, providers, and Samueli) will help guide the workplan and use of findings.
- Key points about Element Consulting Group's approach that align with what the was discussed:
    1. Strong stakeholder engagement, including lived experts, providers across the system, and cross-system partners
    2. A clear equity lens and focus on how CES functions for different populations and SPAs
    3. Coordination with the new Homebase fiscal/resource mapping work so we don't duplicate gap/fiscal analysis
    4. Actionable recommendations for CES policies, governance, and operations that can return to the CoC Board

Business Calendar – Item #6

Recommended Actions

b. Authorize the Office of Care Coordination, as the CES Lead and CoC Administrative Entity, and Orange County United Way, as the HMIS Lead, to work with the selected consultant and provide all needed, relevant data to carry out the Orange County CES evaluation

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