



# NorCal Continuum of Care™

## Executive Board Meeting

September 18, 2025

1:00 pm to 3:00 pm

112 East 2<sup>nd</sup> Street, Housing Program Office  
Alturas, CA 96101

September 18, 2025

### Join Zoom Meeting

<https://us02web.zoom.us/j/81542943275?pwd=c6Xtik4m2fa0hQrcIdJraV8CNsobGS.1>

Meeting ID: 815 4294 3275

Passcode: 718875

### Teleconference Locations:

**Plumas County  
PCIRC  
591 Main Street  
Quincy, CA 95971**

**Siskiyou County Behavioral Health  
2060 Campus Dr.  
Yreka, CA 96097**

**Del Norte County Health and Human Services  
455 K Street  
Crescent City, CA 95531**

**Lassen County Health and Social Services  
1445 Paul Bunyan, Suite B  
Susanville, CA 96130**

**Shasta County  
The Salvation Army Redding Corps  
2691 Larkspur Lane  
Redding, CA 96002**

**Sierra County Behavioral Health  
706 Mill Street  
Loyalton, CA 9611**

### Executive Board Members

**Cathy Rahmeyer,**  
County of Plumas, Chair

**Maddelyn Bryan,**  
County of Siskiyou,  
Vice Chair

**Michael Coats,**  
County of Del Norte

**Grace Poor,**  
County of Lassen

**Tom Sandage,**  
County of Modoc

**Major Tammy Ray,**  
County of Shasta

**Sheryll Prinz-McMillan,**  
County of Sierra

**To Address the Board:** Members of the public may address the Board on any agenda item. Pursuant to the Brown Act (Govt. Code section 54950, et seq.) Board action or discussion cannot be taken on non-agenda matters but the board may briefly respond to statements or questions. You may submit your public comment via email to [cmadison@teachinc.org](mailto:cmadison@teachinc.org) that will be read into the record.



**1. Call to Order/Quorum Established/Introductions**

**2. Public Comments (limited to 3 mins. per comment)**

Members of the public will have the opportunity to address the Board on any issue within the jurisdiction of the Board. Speakers will be limited to three minutes.

**3. Action Items**

**I. Action Item – Approve August 21, 2025, Executive Board Meeting Minutes.**

Review and approve the draft August 21, 2025 Executive Board Meeting Minutes.

**Attachment A – Draft August 21, 2025 Executive Board Meeting Minutes.**

**II. Action Item – Selection of the HMIS System Administrator**

On August 13, 2025 the Executive Board approved the use of an RFP to procure a new HMIS SA and designate the HMIS SA resulting from the procurement process. On August 15, 2025, an RFP for HMIS System Administrator was released with a deadline of September 10, 2025. Two (2) proposals were submitted and received by the deadline. The Executive Board shall use the Rating & Ranking criteria, Exhibit B included in the RFP. Executive Board members have been provided Rating and Ranking Score sheets in Google Forms to complete in advance of the meeting. The forms will be tabulated for presentation at the meeting. The Executive Board shall review the proposals and designate an HMIS System Administrator on September 18, 2025 based on the proposal content and suitability for taking on the HMIS Administrator activities.

NorCal CoC HMIS Administration RFP Rating & Ranking Link: [NorCal CoC HMIS Administration RFP Scores Applications](#)

**Attachment B: Community Technology Alliance**

**Attachment C: Pathways MISI**

**III. Action Item - Executive Board Approval to authorize T.E.A.C.H., Inc. to enter into a contract for services with the HMIS System Administrator selected through the Rating and Ranking process on September 18, 2025. Work will be slated to begin on September 19, 2025 as identified in the HMIS Administrator RFP.**

T.E.A.C.H., Inc. will have available a template for the HMIS System Administrator services contract to enter into to expedite the transition.

**IV. Action Item – Interim Support for Coordinated Entry Operations**

On August 13, 2025 the Executive Board approved the use of an RFP to procure a Coordinated Entry Operator and designate the Coordinated Entry Operator resulting from the procurement process. On August 15, 2025, an RFP for Coordinated Entry Operator was released with a deadline of September 10, 2025. No proposals were submitted and received by the deadline. The Executive Board was scheduled to review the proposals and designate a Coordinated Entry Operator at the September 18 meeting based on the proposals and the RFP process.

As a part of the Administrative Entity Team, Teddie Pierce is positioned to begin evaluating the Coordinated Policy and Process and provide updates to the HMIS/CEP Committee effective September 22, 2025. She will operate the existing processes until a permanent Coordinated Entry Operator is identified.



**V. Action Item – Discuss and approve transferring the WellSky Service Agreement for HMIS Administration to T.E.A.C.H., Inc. effective September 19, 2025.**

T.E.A.C.H., Inc. has contacted WellSky to contract for services on behalf of the NorCal CoC in order to maintain continuity of HMIS service and access. Funding for HMIS WellSky Services funding is included in the NorCal CoC budget through September 18, 2026.

**VI. Action Item – Discuss and approve designating T.E.A.C.H., Inc. to become the Lead Agency with HUD for HMIS and Coordinated Entry effective September 19, 2025. Authorize T.E.A.C.H., Inc. to request HUD transfer the balance of HUD FY 2024 HMIS project funding and balance of HUD FY 2023 HMIS project funding and entire HUD FY 2024 Coordinated Entry project funding to T.E.A.C.H., Inc.**

It is a common practice for Administrative Entities to serve as the Lead Agency to acquire HUD project funding for HMIS and Coordinated Entry and subcontract with an HMIS System Administrator and Coordinated Entry Operator.

**VII. Action Item – Discuss and approve transferring the 2026 PIT/HIC Administration from PCIRC to T.E.A.C.H., Inc.**

In 2024 the Executive Board established a scope of work and budget to fund a NorCal CoC PIT/HIC Administrator in the amount of \$100,000 for two years. The Executive Board issued an RFP to procure a PIT/HIC Administrator. Plumas Crisis Intervention & Resource Center (PCIRC) was selected in July 2024 as the PIT/HIC Administrator for the 2025 PIT Count. The City of Redding entered into a one year contract in the amount of \$45,540. PCIRC has indicated that due to their agency's primary work requirements they are not able to commit the time needed to fulfill a second year. Due to the urgent need to continue the 2026 PIT/HIC planning processes currently underway they have requested that T.E.A.C.H., Inc. assume the responsibilities to serve as the 2026 PIT/HIC Administrator. A proposed budget would not exceed \$54,000. This recommendation was presented to the NorCal CoC PIT Committee on September 16, 2025 for their feedback and support. T.E.A.C.H., Inc. would work with the PIT Committee to confirm any revisions to the Scope of Work.

**VIII. Action Item – Review and approve proposed Street Outreach Policies & Procedures –**

Street Outreach Policies & Procedures were presented to the HMIS Committee on September 15, 2025 to finalize two points and will be transmitted the afternoon of September 15<sup>th</sup> with an accompanying update.

**Attachment D – NorCal CoC Street Outreach Policies & Procedures**

**4. Reports**

**I. PIT/HIC Administrator**

**II. T.E.A.C.H., Inc. – Information**

**a. Proposed Three-Month Plan October-December 2025, to include**

- 1) CoC Performance Measures,
- 2) Policy Development and
- 3) 2026-27 Budget Development.

Future reports will outline our goals and the methods we plan to use to measure progress.

**b. Status update on adding performance measures to the HHAP-5 contracts**



- III.** Governance Charter Work Group - Next Meeting September 25, 2025 12:00 to 1:00
- IV.** Data/Performance Work Group – Data review meeting to begin late October 2025
- V.** UWNC
- VI.** NorCal CoC Members – County Updates

**5. Items for next meeting.**

**6. Adjournment**

If requested, the agenda shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12132), and the federal rules and regulations adopted in implementation thereof. You may contact the T.E.A.C.H., Inc. at (530)233-3111 for disability-related modifications or accommodations, including auxiliary aids or services, in order to participate in the public meeting.

**Next Scheduled meeting - All Member Meeting October 16, 2025 1pm – 3pm**



**Attachment A**  
**DRAFT August 21, 2025**  
**Executive Board Meeting Minutes**  
**11:00 am to 1:00 pm**  
**112 East 2<sup>nd</sup> Street, Housing Program Office**  
**Alturas, CA 96101**

**August 21, 2025 – Housing Program Office**

**Join Zoom Meeting**

**<https://us02web.zoom.us/j/6130715635?pwd=5fvG29xXaX6JaKHf4QLzicapWDSxvT.1&omn=83427983657>**

**PASSCODE: 006592**

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1. **Call to Order/Quorum Established/Introductions** – Roll call, Quorum is established. All members present, Alternate Robert Szopa represents Sierra County
2. **Public Comments (limited to 3 mins. per comment)**  
Members of the public will have the opportunity to address the Board on any issue within the jurisdiction of the Board. Speakers will be limited to three minutes.

### 3. Action Items

#### I. **Action Item – August 13, Executive Board Special Meeting Minutes.**

Review and approve the draft August 13, Executive Board Special Meeting Minutes.

**Attachment A** – Draft August 13, Executive Board Special Meeting Minutes

**Attachment B** – Letter received and read into record from UWNC.

**Attachment C** – Letter from Shasta CoC Advisory identifying Tammy Ray as elected Executive Board Member and Cole Azare as the Alternate.

Motion to Approve by Maddelyn Bryan, Second by Michael Coats, All in favor, none opposed.

#### II. **Action Item –Approve HHAP 5 NOFA Applications for Del Norte County, Del Norte Mission Possible,** Executive Board to review and approve applications for funding HHAP 5 CoC NOFA applications listed below:

**Attachment D** – County of Del Norte

**Attachment E** – Del Norte Mission Possible

**Attachment F** – County of Lassen

**Attachment G** – The Salvation Army (Lassen County)

**Attachment H** – Plumas Crisis Intervention & Resource Center

**Attachment I** – FaithWorks Community Coalition Inc. (Shasta County)

**Attachment J** – Northern Valley Catholic Social Services (Siskiyou County)

**Attachment K** – Youth Empowerment Siskiyou (Siskiyou County) (approved revised budget)

A summary Excel spreadsheet identifying each project, dollar amount, and youth set-aside status is provided.

The total allocation for youth programs is \$981,350, with significant contributions from Faith Works and other county and COC portions. The state requires a cumulative 10% allocation for youth programs, which has been met. Motion to Approve by Maddelyn Bryan, Second by Tom Sandage, All in favor, none opposed.

### 4. Discussion

#### I. Provide update on HMIS and Coordinated Entry RFP process and timeline.

An update on the HMIS and coordinated entry RFP process and timeline is provided by Kristen Schreder. The timeline includes a September 18 contract end date for United Way. Concerns are raised about the timing and process of the RFP, with suggestions for extending the United Way contract and reissuing the RFP. Maddelyn Bryan expresses concerns about the process and timing of the RFP, suggesting a special meeting to discuss extending the United Way contract. Grace and Tammy support the idea of extending the contract and reissuing the RFP. Cathy Rahmeyer, Michael Coats and Tom Sandage share that the RFP process should continue to see what the outcome is before making any changes.

#### II. Discuss proposed HHAP 5 Contract Elements Reporting Framework.

Teddie Pierce introduces the idea of enhancing contracts to align with California system performance measures.



The proposed framework includes targets for enrollments, active enrollments, and outcome indicators. The importance of HMIS data quality as a contract outcome is emphasized. The reporting format could include quarterly updates on the number of people served and outcomes. The framework aims to help the COC meet system performance measures and improve data quality.

**III.** Provided update on preparation of Street Outreach Policies and Procedures.

**5. Reports**

**I. UWNC**

Kalie Brisbon from United Way responds to concerns about their responsiveness, explaining their focus on budget requests. The importance of continuity of service and the impact on end users is highlighted.

**II. PIT Administrator**

Kristen Quaid reports on the PIT administrator's efforts to compile a list of active programs and gather feedback on training and marketing needs.

**III. Governance Charter Work Group**

Governance charter work group is re-engaging with HUD technical assistance to update the governance charter. Discussion included need to clarify the roles and responsibilities of the various committees, such as HMIS and data performance, and include as part of the governance charter review.

**IV. Data/Performance Work Group –**

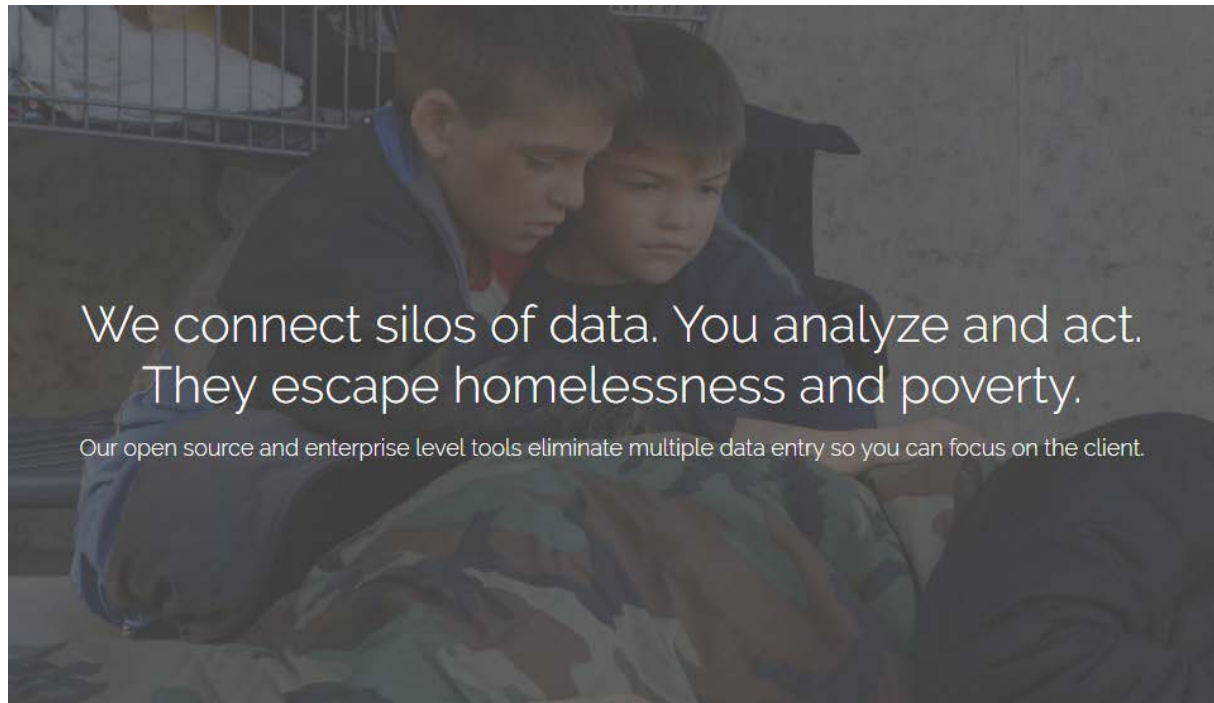
Reconvene the data performance work group, potentially starting in October, to review system performance measure trends.

**V. NorCal CoC Members – County Updates - None were provided**

**6. Adjournment**

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**Next Executive Board Meeting September 18, 2025 1pm – 3pm**



We connect silos of data. You analyze and act.  
They escape homelessness and poverty.

Our open source and enterprise level tools eliminate multiple data entry so you can focus on the client.

Community Technology Alliance

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# NorCal Continuum of Care HMIS System Administrator (SA) Request for Proposal

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## Overview

Project Title:	HMIS System Administration for NorCal CoC
Applicant:	Community Technology Alliance
Address:	333 W San Carlos Street, Suite 600 San Jose, CA 95110
Authorized person:	Bob Russell, CEO
Phone:	408.549.1708
Email:	<a href="mailto:bob@ctagroup.org">bob@ctagroup.org</a>
Business/Legal Entity EIN:	77-0286926

Community Technology Alliance's (CTA) is submitting a proposal to the NorCal Continuum of Care in order to provide Homeless Management Information System (HMIS) System Administration.

CTA is a California nonprofit located in San Jose, California. CTA's mission is to empower communities to develop data driven solutions to end homelessness and poverty. CTA was founded in 1991 to design and construct the infrastructure necessary to support the work to end homelessness in Santa Clara County. CTA has since evolved into a nonprofit focused on improving how data is integrated, exchanged, and used for measurement and reporting.

CTA's expertise focuses on three core competencies:

- **Homeless Management Information Systems** – CTA administers systems that meet your data collection and reporting needs while also ensuring regulatory compliance.
- **Coordinated Entry/Data Hub** – Communicate across agencies and exchange critical data. CTA builds tools to connect existing platforms to an interactive reporting portal so you can quickly view and analyze data.
- **Data Analytics, Performance Measurement, and Visualization** – CTA builds tools to create intuitive data visualizations. These visualizations help make sense of multiple sources of data, identify trends, and demonstrate the effectiveness of programs.

For more information on CTA, go to <https://ctagroup.org/>

CTA has extensive experience (over 34 years) with HMIS and data migration projects. Our experience with HMIS and other related projects is detailed on the next page.

## CTA Experience 2020-2025

The following tables details CTA experience in the past five years in the areas of HMIS, Data Integration/Analytics, and the Tableau Fellowship.

### Homeless Management Information Systems (HMIS)

Recipient	CTA Deliverables:
<b>Connecting Point</b>	CTA provides consulting and support services to Connecting Point (CP) in their role as HMIS system administrators for Nevada and Placer Counties. CTA also built and deployed CP's Community Data Exchange (CDE). The CDE shares referral and client information between health and human service organizations, and consists of web applications for use by residents and partner organizations of Nevada County, Placer County, and the Tahoe/Truckee area.
<b>Merced CoC</b>	CTA has been selected by the CoC to administer their HMIS. Deliverables include system administration, user support, trainings, and data analytics/reporting for HUD mandated and custom reports.
<b>Santa Barbara CoC</b>	CTA administers HMIS for the CoC. Deliverables include system administration, user support, trainings, and data analytics/reporting for HUD mandated and custom reports.

### Data Integration & Data Analytics

Recipient	CTA Deliverables
<b>Annie E Casey Foundation</b>	The Foundation's Atlanta poverty alleviation work builds partnerships to improve education and employment opportunities. Data from multiple systems is validated, integrated, and pointed to Tableau for analytics. Project concluded June 2021.
<b>Connecting Point</b>	CTA built and deployed Connecting Point's Community Data Exchange (CDE) ecosystem. The CDE connects residents in need to available services. The CDE also has a reporting feature to provide stakeholders to visualize and analyze data. Project ongoing.
<b>Goodwill Georgia</b>	Goodwill Georgia administers the SNAPWorks contract for the state. SNAPWorks helps food stamp recipients receive skills training and support services. CTA is building the infrastructure needed to determine program eligibility, validate and integrate data from multiple systems, then point that data to Tableau. Project concluded June 2020.

## CTA Experience 2020-2025

### Tableau Fellowship: Grant (2016-2024)

Recipients	CTA Deliverables
<ul style="list-style-type: none"> <li>-Alliance to End Homelessness in Suburban Cook County</li> <li>-City of Baltimore</li> <li>-Community Solutions</li> <li>-Connecticut Coalition to End Homelessness</li> <li>-Fresno/Madera CoC</li> <li>-Homeward, Richmond, VA</li> <li>-Institute for Community Alliances</li> <li>-Michigan Coalition Against Homelessness</li> <li>-Pathways MISI</li> <li>-Tehama County CoC</li> </ul>	<p>Graphic visualization of data to quickly see trends and measure the effectiveness of your programs. Tableau reporting helps make sense of multiple sources of data and answers the key questions needed for retaining existing funding sources and securing future funding.</p> <p>With the generous support of the Tableau Foundation, CTA worked with 10 communities nationwide to participate in a collaboration to create performance metrics dashboards in Tableau, regardless of the HMIS data source.</p> <p>CTA's 9 year grant (the maximum number of years the Foundation provides a grant) from the Tableau Foundation concluded December 2024.</p>

Based on the above (our experiences over the past 5 years), plus our overall 34 years of experience, CTA has extensive knowledge HMIS and in the following areas:

- Experience with a variety of HMIS vendors, including Bitfocus, ClientTrack, and WellSky.
- Extensive experience with the administration of an HMIS database.
- Implemented data quality control and security protocols for numerous CoCs
- Understand the complexities of HUD regulations and grant management processes.
- Interpreting and reporting for regulatory compliance needs.
- Configuring HMIS with the correct workflow for agencies and projects, and experience with HMIS training for end users.
- Creating custom assessments, and surveys within an HMIS platform.
- Creating custom reports in SAP Business Objects, Looker, and Tableau.
- Coordinated entry design and implementation.

## | Organizational Capacity

A structured and collaborative process is essential for a smooth transition to a new HMIS System Administrator (SA). With our 34 years of experience with HMIS, CTA has the capacity and readiness to support the NorCal CoC as your HMIS SA. As part of the transition, CTA will meet with the current HMIS SA and other stakeholders to:

- Compile key documents, including vendor contact information, procedures, software licenses, along with all workflows, integrations, customizations, etc.
- Review HMIS policies, procedures, and data standards, and elicit feedback from the current SA and stakeholders in what, if anything, needs to be updated.
- Schedule meetings to discuss reporting requirements, vendor relationships, key contacts, data quality and integrity processes, user trainings and materials, security protocols, and important dates (such as upcoming reporting requirements).

As part of the transition process, CTA will also collaborate with the NorCal CoC in order to:

- Understand the CoC and its structure, policies, priorities, and requirements.
- Obtain system access to all necessary systems, including HMIS,
- Review current documentation in order to familiarize ourselves with the current setup.
- Meet with key stakeholders in order to understand current workflow and pain points.
- Begin user support by configuring the NorCal HMIS web portal (see next page for details).
- Develop a work plan detailing priorities for the first few months. The work plan will focus on the needs of the CoC, and could include assessing data quality, reviewing training materials, policies and procedures, and identifying areas for system improvement.
- CTA will also strive to build relationships with the CoC, HMIS users, community partners, agency administrators, and the HMIS vendor to ensure a collaborative approach to data management.

In working with other CoCs in becoming their HMIS System Administrator, HUD provides invaluable information in how to effectively make that transition as smooth and seamless and possible. One such resource is the “HMIS System Administrator Checklist” (<https://files.hudexchange.info/resources/documents/HMIS-System-Administrator-Checklist.pdf>) included in HUD’s “HMIS Lead Product Series.” CTA will utilize this resource and other HUD resources in order to assume our SA responsibilities in a timely manner.

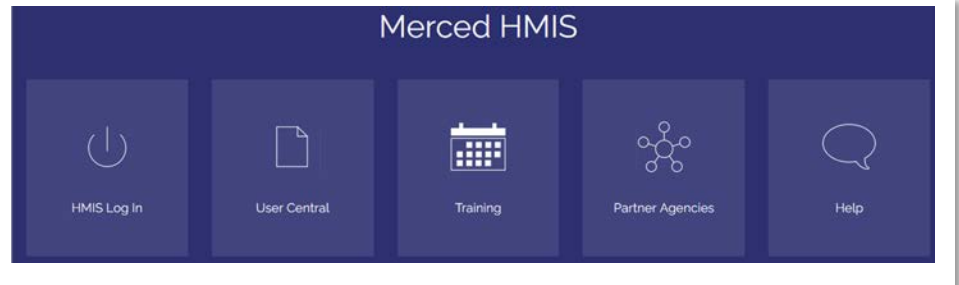
## Organizational Capacity

### HMIS Web Portal

Included in transitioning from the current HMIS SA, CTA will configure its HMIS web portal to provide NorCal HMIS users with online and ongoing HMIS support.

Screenshot of the Merced HMIS web portal.

This will be used as a template to create the NorCal HMIS portal.



The following features could be configured for the NorCal HMIS web portal:

- **HMIS Log in:** Click to access your HMIS site
- **User Central:** A repository of HMIS documents, Intake forms, workflow manuals, and other HMIS-related documents. HMIS users can access, print, or download documents.
- **Training:** Details upcoming trainings. Includes an on-line reservation system for users to sign up for upcoming trainings, and reporting capabilities detailing attendance data.
- **Partner Agencies:** Lists details on HMIS participating agencies, including a link to each partner's web site
- **Help:** CTA's Help Desk. HMIS users can quickly file a ticket detailing their needs. The system then notifies the HMIS Administrator via email of a new ticket. CTA will then provide assistance. If requested, CTA will provide access to a designated NorCal stakeholder in order for that person to access the system and to provide assistance if the request is best handled by a NorCal representative.

### How the HelpDesk works:

- Information on current programs and users will be uploaded to CTA's Help Desk software system in order to create the NorCal CoC Help Desk;
- The HMIS web portal will be configured so users seeking assistance can file a request for help. Once the user submits a request, that request will be uploaded to the NorCal CoC Help Desk and a notification sent to CTA;
- CTA will handle all cases submitted to the Help Desk, unless the request is policy related. If policy related, CTA will forward the request to the applicable NorCal CoC representative.
- CTA will respond to requests within 2 business hours within normal business hours. Most requests will be resolved well within that timeframe. For some requests (example: investigating data quality issues), CTA will provide an estimated timeline for resolution as soon as possible.

Feel free to check out the "Santa Barbara HMIS" portal (<https://ctagroup.org/santa-barbara-hmis/>) or the Merced HMIS" portal (<https://ctagroup.org/merced-hmis/>) to review examples of ability to create HMIS documents, workflow manuals, and other HMIS related materials. These documents and manuals can be found by clicking the "User Central" icon.

## Program Design

### HMIS System Assessment Checklist Template

This template details CTA's standardized HMIS review process. This template can be configured to meet NorCal's unique HMIS policies and procedures, data collection and reporting needs. CTA will use this template and other resources to ensure your community's HMIS SA needs are met.

Technical Expertise	Notes
Maintain HMIS data standards/requirements records	
Attend HUD/HMIS conferences/training opportunities	
Collaborate in increasing HMIS collaborations	
System Administration	Notes
Develop and implement HMIS operations plan and records	
Maintain calendar (reports due, trainings)	
Ensure HMIS infrastructure up and running	
Ensure hosting, storage, backup procedures are in place	
Maintain accurate HMIS user records	
Ensure compliance with HUD requirements re: HMIS set-up	
Configure HMIS workflows within software capacity	
Work with software vendor re: customization	
Remove or archive HMIS client data per CoC guidelines	
Familiarize with vendor's disaster protection & recovery plan	
Develop and manage disaster recovery plan for local hosting of HMIS-related materials	
Update HIC	
Technical Support	Notes
Develop and implement HMIS policies and procedures, helpdesk, and other support structures	
Conduct HMIS helpdesk and support services	
Alert vendor of any HMIS issues/bugs	
Manage HMIS public website	
Maintain accurate HMIS user records	
HMIS Security	Notes
Review/update policies/procedures & security monitoring	
Review/update security plan	
Ensure HMIS configured correctly to ensure compliance with CoC established security protocols	
Ensure data security during any transfer of data	
HMIS Privacy	Notes
Review/update policies/procedures for ROI and any documents containing personal identifying information	
Oversee monitoring compliance	
Data Quality (DQ)	Notes
Establish DQ policies/procedures	
Develop DQ improvement/maintenance plan	
Monitor DQ per established CoC guidelines	
Work with end user to identify and resolve DQ issues	
Conduct record deduplication/mergers	

## | Program Design

Continued from previous page

Training*	Notes
Develop & implement training plan for admins and end users	
Provide trainings or information of system security, privacy, and HMIS policies and procedures	
Provide trainings on report generation	

\* Trainings can be in-person, online, or a combination of the two. Written workflow manuals are also created for each training, detailing the data entry process. These written materials are uploaded to User Central on the HMIS Web Portal, so that users can access at any time. The goal is to provide all users with the training and resource materials they need in order to leverage technology to help their clients.

Reporting*	Notes
Manage data imports and exports	
Create/maintain record of custom reports	
Extract, compile, and analyze data in accordance with CoC in creation and submission of HUD mandate reports	
Contribute and/or prepare and submit the APR, LSA and other reports	

\* CTA will provide HMIS reporting support per NorCal's specifications. Deliverables may include any combination of the following:

- Support for HUD mandated deliverables such as APR, ESG and CAPER;
- Provide support to SSVF programs for their monthly uploads;
- Analyze data issues and provide with recommendations for data resolutions;
- Reconcile HMIS agency data with the HIC;
- Upload or facilitate the upload to HDX;
- Provide scope of work for any customized reporting.

This next section details CTA's policies in regards to program management and design.

CTA has provided HMIS consulting services since its founding in 1991. CTA has extensive experience and expertise in HMIS, data collection, reporting, coordinated entry, and in leveraging data to ensure people in need are connected to the right resources at the right time.

CTA uses the Agile approach for project management. The Agile approach focuses on incremental, iterative workflows and empirical feedback. All deliverables detailed in this proposal will be provided by CTA. CTA will collaborate with the NorCal in communicating and engaging with stakeholders.

CTA believes projects should have a clear management approach. The primary focus of CTA's approach is to work collaboratively with stakeholders to ensure the project meets the defined requirements, and consistently produces quality deliverables and overall service. Project schedules will be created starting with the deliverables identified in the scope of work. The schedule will identify deliverable dates, tasks to be performed, and roles and responsibilities to complete each deliverable. Activity sequencing will be used to determine the order of deliverables and to assign relationships between activities.

## **| Program Design/Management**

CTA recognizes that NorCal CoC has unique HMIS data collection and data compliance needs. If deliverables in this proposal needs to be adjusted in order to better reflect NorCal CoC's needs and resources, CTA would welcome the opportunity to submit a revised proposal.

### **Project management plan**

The plan will include roles and responsibilities, budget, scope of work and schedules, staffing, communication, and management plan. All project plans will be approved by NorCal CoC. CTA's Project Director will have the authority and responsibility for managing and executing this project according to the agreed upon project plan.

### **Cost management plan**

CTA's Project Director will be responsible for managing and reporting on the project's cost throughout the project. All budgetary authority and decisions, including budget changes, reside with NorCal CoC.

### **Schedule management plan**

The schedule will identify deliverable dates, tasks, roles and responsibilities for each deliverable. CTA will calculate a length of time estimate to complete each work package. Once a preliminary schedule has been developed, it will be reviewed by the project team. The project team must approve the proposed work package assignments, durations, and schedules. Once this is achieved, NorCal CoC will review and approve the schedule.

### **Communication management plan**

The Project Director will take the lead role in ensuring effective communication on this project. Communication requirements will be documented in the project plan. CTA and NorCal CoC will determine who will communicate, when, and to what audience.

### **Project scope management plan**

NorCal and CTA's Project Director will establish and approve documentation describing scope, which includes deliverable quality checklists and performance measurements.

### **Change Management Policy**

It may be necessary to amend the scope of work as NorCal's HMIS data collection and reporting needs evolve. The purpose of this policy is to manage change requests so that approved changes will be controlled, ensuring the project remains on schedule, within budget and provides the agree deliverables. The primary objectives of change management are to:

- Manage each change request from initiation through closure;
- Process a change request based upon direction from the appropriate authority;
- Communicate the impact of changes to the appropriate stakeholders;
- Allow small changes to be managed with a minimum of overhead.

## | Impact & Effectiveness

Homelessness is a complex social issue that affects individuals, families, and communities. Providing effective services and programs to those experiencing homelessness (or at risk of becoming homeless) is crucial for addressing this issue. This is where the Homeless Management Information System (HMIS) comes in. HMIS is an important tool that helps a community provide housing and other essential services to their neighbors in needs.

Data quality is critical in a CoC's ability to accurately communicate its efforts in addressing and solving homelessness to its stakeholders at the federal, state, and local level. A lack of data quality negatively impacts a community's ability to communicate its efforts in addressing and solving homelessness because its HMIS data does not accurately reflect reality.

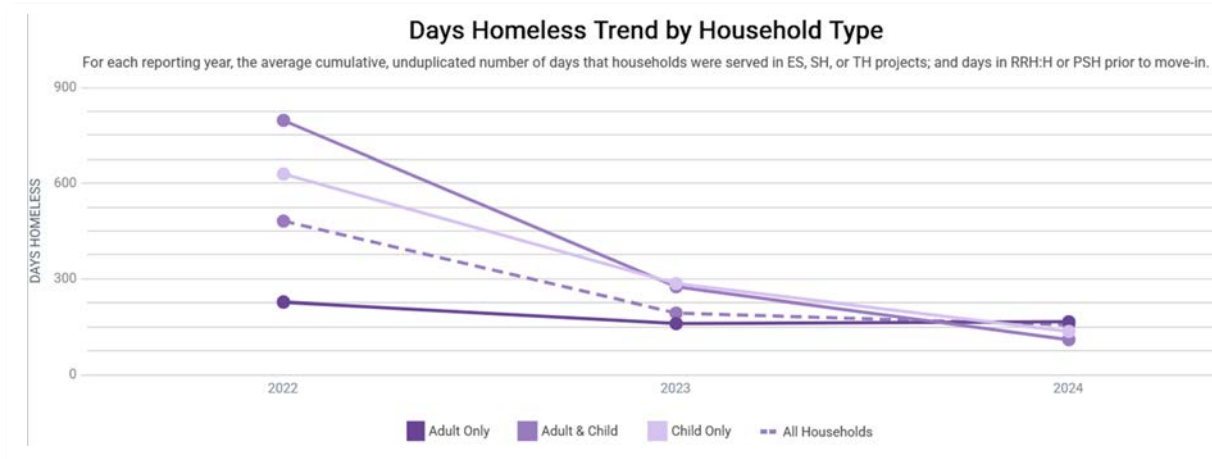
Based on the recommendations contained in the Institute of Community Alliances recommendations, CTA would begin its efforts in supporting the HMIS Systems and Reporting for the NorCal CoC by implementing the Data Quality recommendations as detailed in Table 19-Data Quality Recommendations. Deliverables include, but not limited to:

- Working with the NorCal CoC and stakeholders in creating and maintaining a CoC-level Data Quality Management Plan for review and approval by the CoC Executive Board. The Data Quality Management Plan will provide specific guidance of data collection, management, and monitoring protocols.
- Review how agencies and projects are configured in HMIS and make any necessary changes to those configurations. For example, implements the recommendations in Table 9-Provider Tree Configuration Tasks.
- Work with NorCal CoC and stakeholders in addressing and correcting all known data quality issues in HMIS. For example, identifying and merging duplicate client files into a single file.
- Update current workflow manuals (or create new workflow manuals) and pair those manuals with end user trainings.
- Work with agencies to address any workflow and data entry errors and to create an improvement plan with target benchmarks and dates in order to improve the quality and accuracy of their data.

CTA has worked with numerous CoCs in addressing issues that impact their impact and effectiveness in accurately reporting their efforts to address and eliminate homelessness. The next page details the impact in one community where CTA worked with stakeholders to address data quality issues.

## | Data Quality Experience Example

Below is a screenshot from HDX detailing the dramatic decrease in “Day Homeless Trend by Household Type” for one of the communities CTA provides HMIS support.



In this example, the community recognized their ongoing data quality issues were negatively impacting their ability to accurately report on their efforts to address homelessness. One such issue was the length of time an individual or family was homeless after their initial contact with a service provider.

CTA was retained by this community to help them identify and address data quality issues. After reviewing their HMIS configuration and data entry practices, CTA was able to identify several data management issues that were not accurately reporting their community's efforts to end homelessness. After identifying these issues, CTA met with various agencies/programs to address current data collection/data quality issues, and to institute a series of best practices in updating client files in a timely manner. As a result of these efforts, the community's 2023 LSA submission showed a dramatic decrease in the length of time homeless. This dramatic decrease was a result of aligning their HMIS data with the actual work accomplished by service providers in connecting homeless individuals and families to available housing.

## Budget

The budget estimate is based on our work with CoCs of similar size to the NorCal CoC.

Task	Description	Pricing
<b>HMIS Vendor, licensing, &amp; administrative costs</b>	Contract & fees associated with CoC approved HMIS vendor	To be determined
<b>System Administration Deliverables</b>		
<b>NorCal CoC</b>	Up to 8 hours per month in CoC support, includes meetings, HMIS Committee support, reviewing/addressing data quality, data sharing agreements, HIC maintenance	\$21,600
<b>NorCal HMIS Portal</b>	Deploy, host and maintain the NorCal HMIS portal	\$2,400
<b>End User Support</b>	Up to 5 hours per month in end user support	\$9,000
<b>HUD Reports</b>	Up to 100 hours for HUD mandated reports (APR, LSA, SSVF, and Performance Measures)	\$18,500
<b>Governance</b>	Review/revise/establish HMIS Policies & Procedures, HMIS Privacy & Security, Data Quality Management plans	\$9,000
<b>Trainings</b>	Up to 18 trainings in any combination of New User, Advanced User, Reporting, or Other (e.g. SSVF, RHY, etc) with accompanying workflow manuals	\$12,600
<b>CES</b>	Up to 75 hours to support CES and to consult with ESG recipients on implementing a centralized or coordinated assessment in alignment with selected HMIS vendor	\$11,250
<b>Contingency</b>	4% contingency fee to cover additional trainings, support, reporting, or other deliverables associated with HMIS system administration	\$3,375
	<b>System Administration total</b>	<b>\$87,725*</b>

\*The System Administration total does not include the fees associated with the contracted HMIS vendor.

### Additional optional services:

- Consulting: \$150 per hour
- Reporting: \$185 per hour
- Trainings: \$700 per training



September 10, 2025

NorCal CoC Executive Board  
c/o T.E.A.C.H. Inc.  
Email: [kristen@kristenschreder.com](mailto:kristen@kristenschreder.com)

Dear Members of the NorCal CoC Executive Board,

On behalf of Pathways MISI, I am pleased to submit our proposal in response to the Request for Proposals for the Homeless Management Information System (HMIS) System Administrator for the NorCal Continuum of Care.

Pathways MISI brings four decades of leadership in System administration, HMIS administration, data governance, and community collaboration. We successfully support small to medium size Continuums of Care across the country with HUD-compliant HMIS implementations, robust data quality management plans, and responsive technical support systems. Our team is experienced in managing vendor relationships and federal contracts, developing privacy and security policies, and supporting Coordinated Entry systems tailored to local priorities.

We are committed to full compliance with HUD regulations and to working in close partnership with the NorCal CoC Executive Board to ensure transparency, accountability, and continuous improvement. We welcome the opportunity to contribute our expertise to support the region's efforts to end homelessness.

Thank you for considering our proposal. We look forward to the opportunity to collaborate with you.

Sincerely,

A handwritten signature in black ink, appearing to be "W. Matson", with a horizontal line extending to the right.

William Matson  
Executive Director  
Pathways Community Network Institute

## 1. Experience

### A. Interpreting and Reporting for Regulatory Compliance Needs

Pathways MISI has decades of experience managing HMIS implementations and ensuring compliance with federal and state requirements. Our organization conducts annual, on-site compliance audits, reviews data quality, security measures, and privacy standards, and audits major software releases for HUD data standards compliance.

Regular training and technical assistance are provided to HMIS users to ensure understanding of compliance requirements, including updates on HMIS standards and protocols. Incident response plans are maintained for investigating and resolving data breaches or security incidents.

### B. Interpreting and Training End Users on Project-Specific Workflows

Pathways MISI offers comprehensive training for new users and continuing education, including courses on Data Quality, Privacy and Security, Ethics and Confidentiality, Reporting, and Privacy and Security. All generic new user courses and specialized user courses (SSVF, YHDP, RHY, PATH) include a strong emphasis on project-specific workflows.

Training is delivered in multiple modalities (live, on-demand, in-person), designed by instructional professionals in partnership with HMIS subject matter experts. Monthly HMIS Office Hours and self-paced training are available to accommodate varying skill levels and schedules. We also provide technical support through phone, email, and an online portal, including screen sharing for hands-on assistance.

### C. Familiarity with Federal and State Homeless Funding Streams and related Project Setup Requirements and Other Requirements

Pathways MISI has secured and administered funding from federal agencies (HUD, HHS), United Way, state/local governments, private foundations, and corporate entities. Many of these funders have required specialized project setups, which we have successfully implemented.

Our team is experienced in applying for and administering public and private funds, with grant writers and administration staff who are well versed in federal grant requirements and OMB Uniform Guidance.

Our organization has operated HUD-funded programs for over 25 years, including CoC, TA, CDBG, and ESG programs, and has a history of compliance with HUD regulations and successful program audits.

### D. Creating Custom Assessments and Surveys within HMIS, Custom Reporting in SAP Business Objects, Providing Custom Data Sets

Pathways MISI has developed custom assessments, such as the MAP (Matching for Appropriate Placement) assessment, in partnership with academic experts and

stakeholders. The MAP is now a standard feature of the WellSky Community Services HMIS platform and is also available on other HMIS systems.

Our organization is highly familiar with custom reporting technologies, including SAP Business Objects, Microsoft Power BI and Google Looker, will develop custom reports, dashboards, and dataset exports for the CoC as needed.

Custom reporting and dashboard development are iterative, with stakeholder feedback incorporated to ensure requirements are met. Data sets are provided upon request for analysis and reporting.

#### **E. Designing Custom Coordinated Entry Vulnerability Assessment Tools**

As noted above, Pathways MISI led the development of the MAP assessment tool for Coordinated Entry and collaborated with WellSky engineers to include it as a standard feature of the Community Services HMIS platform.

Our HMIS Administration team is highly experienced at creating custom assessments on the WellSky platform and will do so for the CoC on request.

#### **F. Additional Relevant Experience**

**System Administration:** Pathways MISI has administered IT systems since 1974 and HMIS since 2004, supporting over 1,000 users across eight states. The team ensures accurate data collection, reporting, compliance, data quality audits, and technical support.

**Policy Development:** Our organization develops and maintains comprehensive policies and procedures for internal operations and collaborates with CoCs to align with local values and HUD requirements.

**Data Analysis & Dashboards:** The team includes specialists with decades of experience in data analysis and dashboard design, using platforms like Google Looker and Microsoft PowerBI for public-facing dashboards.

## **2. Organizational Capacity**

Pathways MISI maintains a robust infrastructure to support HMIS administration: Our organization brings decades of experience, robust infrastructure, and a proven track record in HMIS administration, positioning Our organization as a highly capable and ready partner for the NorCal CoC.

#### **Organizational Experience and Expertise**

Pathways MISI has administered IT systems since 1974 and HMIS implementations since the HUD mandate in 2004, and currently supports over 700 users across eight states. Our organization has served most communities for 5 to 25 years, demonstrating stability and long-term commitment. Pathways MISI's expertise spans all facets of HMIS administration, including data collection, reporting, compliance, and technical support. The team has

managed diverse projects, from data quality remediation to large-scale software enhancements, and has provided technical assistance to CoCs on behalf of HUD and HHS.

### **Staffing and Specialized Roles**

The staffing plan includes a Project Manager/HMIS Coordinator, Technical Assistance Specialist, HMIS Support Analyst, Data Analyst/Dashboard Developer, Instructional Developer/Trainer, and CoC Liaison. Each role will be filled by professionals with significant experience in HMIS, data analysis, instructional design, and government contracting. This expanded team ensures that all deliverables and responsibilities outlined in the RFP are met with expertise and efficiency.

### **Stakeholder Engagement and Collaboration**

Pathways MISI is deeply committed to stakeholder engagement, working collaboratively with HMIS Lead staff, the CoC's HMIS Committee, Coordinated Entry leadership, and other key partners. Our organization regularly conducts face-to-face visits at each agency, builds relationships, and observes operations to tailor support and training. Annual surveys and interviews are used to gather feedback and drive process improvements.

### **Compliance, Quality Control, and Security**

Our organization conducts annual on-site compliance audits, regular data quality checks, and privacy/security audits at each participating agency. Pathways MISI maintains strong access controls, role-based permissions, and up-to-date security protocols.

### **Training and Technical Support**

Pathways MISI offers comprehensive training programs, including New User, Data Quality, Privacy and Security, Annual Retraining, and Ethics and Confidentiality. Training is available in multiple modalities—live, on-demand, and in-person—to accommodate all user needs. The help desk provides multi-channel support, including phone, email, online portal, and screen sharing for real-time assistance. Monthly HMIS Office Hours and self-paced learning resources further support users at all experience levels.

### **Reporting and Data Analysis**

The Pathways MISI team is highly experienced in compiling, validating, and submitting all required federal and state reports, including LSA, HUD System Performance Measures, California System Performance Measures, Point in Time counts, and Housing Inventory updates. Pathways MISI develops custom dashboards and reports using platforms like Google Looker and Microsoft Power BI, ensuring stakeholders have access to actionable data for oversight and evaluation.

### **Financial Stability and Administrative Capacity**

Pathways MISI is a mature, financially stable nonprofit, generating approximately \$1.2 million in annual revenues from diverse funding sources. Our organization maintains reserves of two to three months of cash flow and adheres to federal Uniform Guidance regulations, including annual audits and financial reviews. The budget plan includes

dedicated resources for staffing, software, professional services, travel, and conferences, ensuring the capacity to support expansion and meet all contract requirements.

#### **Continuous Improvement and Readiness**

Pathways MISI uses data-driven self-evaluation tools, including help portal analytics, time and attendance tracking, and data quality audit trends, to identify opportunities for improvement and ensure system capacity meets stakeholder needs. Our organization's workflow centers on regular meetings with CoC Leadership and the CoC Liaison, enabling agile response to evolving priorities and challenges.

### **3. Program Design**

Our proposed activities directly reflect the Scope of Work outlined in the RFP:

#### **Overall Approach**

Pathways MISI's support for HMIS implementations in small to medium-sized Continuums of Care (CoCs) is grounded in deep experience, regulatory expertise, and a commitment to community collaboration. With over four decades of experience, Pathways MISI offers a full suite of HMIS services tailored to the needs of smaller CoCs, including HMIS administration, data integration, quality auditing, and reporting. Our team has successfully managed HMIS transitions for multiple CoCs, developed custom assessments and dashboards, and provided technical assistance on behalf of HUD and HHS.

Our approach emphasizes strategic planning, compliance, and capacity building. We assist CoCs with HUD-mandated reports, ensuring timely and accurate submissions through structured workflows and vendor coordination. Pathways MISI also supports Coordinated Entry implementations and engages with HMIS committees to incorporate user feedback into system improvements.

Our help desk services, training programs, and policy development efforts are designed to empower CoCs to meet federal standards while advancing local goals. This comprehensive model enables small and medium-sized CoCs to leverage technology and data for more effective service delivery and community impact.

#### **Contract Management**

*Oversight of vendor performance and timely payments, with escalation protocols for non-compliance.*

Our contract management approach includes proactive monitoring of HMIS license utilization and WellSky-provided support services. We maintain a regularly updated inventory of active users and cross-reference these figures with project enrollments, ensuring that the Continuum of Care (CoC) is billed strictly for the number of licenses and support hours required at any given time.

Through periodic reviews and open lines of communication with WellSky, we will adjust contract terms at each renewal to reflect changes in program size or staffing, preventing unnecessary expenditure. Escalation protocols are in place to involve the CoC Executive Board as needed to address any discrepancies or overages, guaranteeing that vendor performance aligns with the needs and budgetary constraints of the CoC.

### Policy Oversight

*Annual review and updates of Privacy and Security policies, End User Agreements, and Data Sharing Agreements.*

Pathways MISI will conduct a comprehensive and systematic annual review of HMIS Policies and Procedures, Privacy and Security Policies, Data Quality Plans, End User Agreements, and Data Sharing Agreements. This review process is designed to ensure that these important documents align with all regulatory changes, new HUD guidance, and evolving local needs.

As part of this review, Pathways MISI examines current documents in detail, benchmarking them against the latest HUD requirements, state and local data privacy laws, and best practices within the field. Particular attention is paid to ensuring that policies remain both compliant and practical for end users, maintaining clarity around data access rights, storage protocols, and user responsibilities.

Privacy and Security Policies are evaluated with input from legal advisors, ensuring that all reasonable technical, administrative, and physical safeguards are addressed. End User Agreements are reviewed for plain-language clarity and updated to reflect any changes in user responsibilities, system functionality, or legal frameworks. Data Sharing Agreements are analyzed to guarantee that all inter-agency data exchanges are transparent and aligned with consent standards.

Draft revisions will be circulated to stakeholders for feedback, following the CoC's preferred approval processes. Pathways MISI will maintain version control and documentation of all changes for audit and compliance purposes, ensuring that the CoC remains well-informed and protected by the most current and effective policies available.

### Data Quality

*Implementation and monitoring of CoC-level Data Quality Management Plans (DQMPs), including regular audits.*

As noted above, Pathways MISI will develop (if needed), implement and annually update a DQMP for the CoC, and will audit HMIS participating organizations for compliance with the Plan's requirements.

Pathways MISI's Data Quality Audit process is designed to ensure the accuracy, completeness, and usability of HMIS data across all participating agencies. Projects are monitored either monthly or quarterly depending on their performance against CoC data

quality goals. The audits focus on key data elements such as Personally Identifying Information (PII), Universal Data Elements, and project lifecycle records (entry, update, exit). We use a proprietary auditing process to make error identification and correction easier for end users.

Agencies will receive detailed audit reports in both spreadsheet and PDF formats, highlighting specific issues in each client record and offering guidance for resolution. When needed, technical assistance visits will be scheduled, and the Continuum of Care will be kept informed of all audit outcomes. The audit findings also support broader research efforts and performance evaluations, feeding into dashboards and CoC Key Performance Indicators. To further support data quality, Pathways offers on-demand HMIS data quality training sessions.

### **Coordinated Entry Support**

*Alignment with CoC-approved subpopulation priorities and ESG-funded centralized assessment systems*

Pathways MISI has extensive experience supporting Coordinated Entry (CE) implementations across multiple CoCs, with a focus on aligning these systems with HUD requirements, and with local priorities and resources. We have played a central role in designing, implementing, and evaluating CE systems, including the development of custom assessments like the Matching for Appropriate Placement (MAP) tool. Pathways MISI has also led evaluations of CE systems, where we assessed local policies, conducted stakeholder interviews and lived experience focus groups, and identified areas for improvement.

Pathways MISI will configure the HMIS to support local, state, and federal data collection requirements and workflows. We will also provide specialized support to the Coordinated Entry Lead to ensure that any custom reporting needs such as By Name Lists are met, and we will work closely with the ESG Recipient to facilitate the implementation of Coordinated Entry data collection and reporting processes that they require.

### **Compliance and Reporting**

*Timely submission of HUD-mandated reports (LSA, SPM, PIT, HIC, HMIS APR) with Executive Board review.*

Pathways MISI has a comprehensive and structured process in place for submitting HUD-required reports, ensuring compliance with HUD and CoC requirements. We are responsible for generating and submitting reports such as the Longitudinal System Analysis (LSA), System Performance Measures (SPMs), Annual Performance Reports (APRs), Sheltered Point in Time (PiT) counts and Housing Inventories, and CAPERs for ESG and HOPWA programs. These submissions will be closely coordinated with the CoC ensure accuracy, oversight and timeliness.

To support this process, Pathways MISI will conduct periodic reviews of HMIS data quality and system configurations, working directly with vendors to resolve discrepancies and maintain compliance with evolving HUD standards. The team will also provide technical assistance, training, and documentation to HMIS users, including help desk support and web-based sessions on data quality and reporting. When HUD updates its data standards or reporting specifications, Pathways MISI will organize special training courses and communicate changes through CoC meetings and user groups.

### **Governance Engagement**

#### *Active support of HMIS Committee and incorporation of user feedback*

Pathways MISI will provide active support to the CoC's HMIS Committee, working collaboratively with CoC leadership to ensure alignment with CoC plans and priorities. Our efforts will be aimed at fostering the creation of key performance indicators and encouraging their use to enhance understanding of CoC goals and improve the likelihood of success.

HMIS Committees also serve as valuable sources of feedback on an HMIS implementation, and we intentionally include opportunities for action and feedback in each HMIS Committee agenda that we help to develop. Other feedback sources that Pathways MISI depends on include blind surveys that are automatically sent to HMIS users when we resolve their help desk tickets, the annual survey of all Pathways MISI clients, and the feedback request at the bottom of each Pathways MISI team member's email signature.

### **Training and Technical Support**

#### **Annual HMIS Training Plan**

Pathways MISI is committed to fostering a culture of continuous learning and technical excellence across all HMIS users within the Continuum of Care (CoC). Each year, we will begin by engaging stakeholders through surveys and interviews to identify emerging training needs and areas for improvement. Drawing on user feedback and help desk analytics, our instructional professionals will collaborate with HMIS subject matter experts to design a comprehensive training plan that addresses both foundational and advanced topics. This plan will include regularly scheduled courses such as New User Orientation, Data Quality, Privacy and Security, Annual Retraining, Reporting, and Ethics and Confidentiality, as well as specialized offerings the CoC requires.

Training will be delivered in multiple formats—including live instructor-led classes, on-demand self-paced modules, and in-person workshops—to accommodate diverse learning styles and schedules. The training calendar and materials are published on our dedicated learning portal, ensuring easy access for all users. Throughout the year, we will monitor participation and collect feedback to refine our approach, ensuring the training plan remains responsive to the evolving needs of the CoC.

*Note: all the courses mentioned above currently exist and will be immediately available to HMIS users.*

### **Onboarding Support and Ongoing Technical Assistance**

When a new agency or project joins the HMIS, Pathways MISI will provide hands-on onboarding support to ensure a smooth and compliant transition. Our team will guide agencies through initial system configuration, data migration, and user account setup, aligning every step with contract requirements and best practices. As noted above, new users receive tailored training that covers HMIS policies and procedures, user guides, privacy and security protocols, and Coordinated Entry workflows. This will ensure that all participants are equipped with the knowledge and skills needed to use the system effectively and securely from day one.

Beyond onboarding, our multi-channel help desk offers ongoing technical assistance via phone, email, and an online portal, resolving issues promptly and providing personalized support—including screen sharing for real-time troubleshooting and training. Monthly HMIS Office Hours offer additional opportunities for users to receive guidance, ask questions, and stay informed about system updates. As policies and procedures evolve, we will proactively update documentation and communicate changes to all users, offering refresher training as needed to maintain compliance and operational excellence.

### **Reporting**

To ensure the NorCal CoC and its partners receive timely, accurate, and actionable data, Pathways MISI will implement a comprehensive reporting strategy that is both responsive to stakeholder needs and compliant with all federal, state, and local requirements.

#### **CoC-Level and Custom Reporting**

Pathways MISI will collaborate closely with the CoC Executive Board and Administrative Entity to identify reporting needs as they arise, referencing the approved Data & Reporting Plan. Standard and custom reports, as well as data sets, will be developed and delivered to support oversight, evaluation, and compliance efforts. The team will also work with identified evaluation and oversight processes to provide requested data sets, ensuring that all stakeholders have the information necessary for effective decision-making and program monitoring.

#### **Federal and State Compliance Reporting**

A core Pathways MISI responsibility will be the compilation, review, and submission of all required federal and state reports, including Longitudinal Systems Analysis (LSA), HUD System Performance Measures, California System Performance Measures, and other funder-mandated submissions. Each report will undergo rigorous data quality checks, leveraging quarterly and monthly audits to ensure accuracy and completeness. The team will maintain a calendar of submission deadlines and coordinate with agency leads to gather, validate, and finalize all required data.

### Point in Time and Housing Inventory Data

Pathways MISI will coordinate the collection of Point in Time (PIT) data from all participating counties, verifying unsheltered counts and HMIS bed utilization levels. This data will be compiled and submitted to the HUD-mandated repository by the annual deadline. Housing Inventory data will be maintained on a semi-annual basis, tracking new units and compiling inventory reports for submission to HUD. These efforts will ensure that the CoC's inventory and utilization data remain current and accurate.

### Performance Measures and Agency Support

Federal and state performance measure reports will be compiled with thorough data quality reviews, meeting all stated submission dates. Pathways MISI will also support individual agency reporting needs for programs such as CoC, ESG, PATH, RHYP, VA, and others, providing tailored data sets and guidance to meet funder compliance requirements. The team will develop and maintain standard queries and reports for HMIS, CoC, Advisory Boards, and agencies, responding promptly to requests for information.

### Status Updates and Stakeholder Communication

Regular status updates, data summaries, and program performance reports will be provided to the Administrative Entity, CoC Executive Board, NorCal Advisory Boards, and user agencies. These communications will foster transparency, support evaluative and oversight efforts, and ensure that all stakeholders are informed about HMIS status, data trends, and program outcomes.

### Continuous Improvement

Throughout the year, Pathways MISI will integrate ongoing data quality reviews, stakeholder feedback, and compliance monitoring into its reporting processes. This commitment to continuous improvement will empower the CoC and its partners to evaluate progress, identify challenges, and drive enhancements in homeless services delivery.

### Transition Plan

Pathways MISI is prepared to assume HMIS administration, end-user support, and training services immediately upon execution of a services agreement, ensuring continuity with no disruption to end users. Because most of the information needed to launch services is already available within the HMIS, we anticipate a rapid and seamless transition. Should the current HMIS Administrator be available, we will request a list of unresolved support issues and training completion records to accelerate continuity of service; if not, we will reconstruct this information directly from the system and user engagement.

Within the first week, we will implement our **Transition Kickoff Plan**, which includes:

- Direct outreach to all HMIS users with instructions for accessing our support and training portals ([help.pathwaysmisi.org](https://help.pathwaysmisi.org) and [learn.pathwaysmisi.org](https://learn.pathwaysmisi.org)) and direct help desk contact information.

- Establishing a baseline status report on outstanding support issues and data quality priorities.
- Coordinating with CoC leadership to ensure consistent messaging to stakeholders and to schedule opportunities for Pathways MISI to present at upcoming CoC meetings.

This structured approach provides end users with immediate clarity on how to access support, allows CoC leadership full visibility into transition progress, and positions the community for long-term stability and improvement under our administration.

#### HMIS Assessment

Work on the issues identified in the HMIS Assessment should begin and/or proceed without delay. We have reviewed the assessment and its Draft Work Plan and are prepared to implement it in the following stages:

- ✓ Priority 1 Draft Work Plan Tasks: complete by LSA draft submission date (early November)
- ✓ Priority 2 Draft Work Plan Tasks that contribute to LSA errors and warnings: complete by LSA submission date (early January)
- ✓ Remainder of tasks to be prioritized, with deadlines spread throughout the contract year

We would welcome collaboration with the HMIS Assessment's authors during this process, if they are available.

#### 4. Impact and Effectiveness

Pathways MISI is deeply committed to a culture of continuous improvement, systematically evaluating success through multiple feedback and quality assurance mechanisms that result in measurable improvements in system usability and performance. We actively solicit user input through periodic surveys (with response rates averaging 70%+), HMIS Committee meetings, and targeted focus groups, ensuring stakeholder perspectives directly shape enhancements to both workflows and reporting. Our dynamic data quality and Coordinated Entry dashboards allow communities to track real-time progress, which has led to documented reductions in data entry errors and faster client connections to housing.

To foster accountability and transparency, we provide CoC leadership with monthly summaries of support and training activities, consistently resolving more than 90% of tickets within 4 hours. Annual audits, guided by HUD's HMIS Lead Toolkit and the HMIS Lead or Administrator Agreement, not only ensure compliance but also generate actionable recommendations that strengthen long-term system effectiveness. By combining rigorous compliance with user-driven innovation, Pathways MISI helps communities maintain high federal performance standards while continually improving the local client experience.

## 5. Budget

### Software

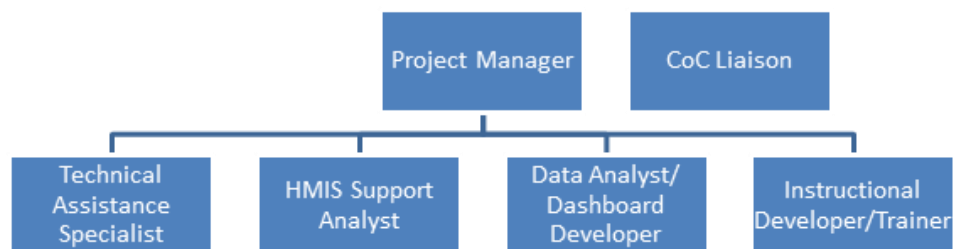
This line item encompasses the costs associated with software used to provide services to NorCal CoC HMIS users. WellSky HMIS Licensing comprises 120 HMIS User Licenses and an equal number of licenses for the Business Objects reporting system. Portal Licensing represents the costs for the help.pathwaysmisi.org HMIS support portal (two help desk users), the learn.pathwaysmisi.org training portal (120 HMIS users), and the secure Citrix file service used for sending/receiving protected personal information and processing HMIS agency and user license requests (one user).

The CoC currently uses about 100 of the 120 HMIS licenses that have been purchased. We will negotiate to reduce the number of licenses in the next WellSky contract to match the CoC's actual need, reducing annual costs by about \$10,000.

### Staffing

This line item represents the cost of Pathways MISI staff assigned to the NorCal CoC HMIS. It includes the Project Manager (estimated at 192 hours per year), the CoC Liaison (approximately 36 hours per year), the Technical Assistance Specialist (full time, at least 1,640 hours per year), and the HMIS Support Analyst (about 410 hours per year). The organizational chart below illustrates the relationships between these positions.

Our experience providing HMIS Lead/HMIS Administration services to CoCs of similar size to the NorCal CoC shows that this staffing model is the proper size and design to meet your needs.



Note that estimated costs for Travel (agency site visits) and Training Conferences are also included in this budget category.

### Services

This line item covers professional services provided by WellSky, and by Pathways MISI consultants. WellSky services included in this budget category were procured by the current HMIS Administrator and will no longer be needed. We will sunset these services as contract obligations end.

Pathways MISI contractors include the Dashboard/Reports Developer (up to 40 hours per year) and the Instructional Developer/Trainer (scheduled HMIS User live trainings, one new live and user-directed course per year, and maintenance/updates to existing reports).

### **Indirect and Administrative Costs**

The budget totals below include administrative costs assessed at the ten percent de minimis rate allowed by the federal government. Because we have included all costs associated with proposed activities in the budget, we have not employed an indirect cost rate in this proposal.

## Budget

Activity	Cost
Software	
WellSky HMIS Licensing	51,210.00
Portal Licensing	<u>2,189.55</u>
Total Software	53,399.55
Staffing	
Dedicated Staff (1 FTE)	82,346.55
Other Staff (0.4 FTE)	32,938.62
Travel Costs	6,000.00
Conference Costs	<u>5,000.00</u>
Total Staffing	126,285.17
Services	
WellSky Services	16,104.50
Dashboard/Advanced Reports Development	5,400.00
HMIS User Training	2,400.00
Training Development	<u>7,000.00</u>
Total Services	30,904.50
<b>Total Costs</b>	<b>210,589.22</b>

Though not required to fulfill the Scope of Work detailed in the RFP, the following add-ons are also available:

- Additional Dashboard/Data Analysis help: \$1,350.00 per 10-hour pack
- Custom Data Integration assistance: \$950.00 per 10-hour pack
- Custom Instructional Development: \$950.00 per 10-hour pack
- Live, in person training: \$500.00 per session (minimum of two per day), plus travel costs

Thank you for the opportunity to respond to your HMIS Administrator Request for Proposals.

Attachment D

September 18, 2025

NorCal CoC Executive Board Meeting Agenda

**Cover page and attached Street Outreach Policies and Procedures.**

**As presented to the HMIS Committee -**

Please review the current draft of the CoC-wide Street Outreach Policy. There are two areas to finish up prior to EB final approval scheduled for Sept 18, 2025.

Please be sure to review the entire policy and look for two areas highlighted in red which need a final discussion. First, on page 5 there are two areas needing input. One is that it would be helpful on a CoC basis if there were at least quarterly meetings to discuss Street Outreach best practices and discuss clients who may have moved into another area.

Maddelyn and I were mulling around the best place to hold an outreach update may be the existing Coordinated Entry Committee since clients and placements were already being discussed. It would also make good use of meeting participants and save on creating any more meetings to attend.

Second, at the top of page seven we need to come up with a number of days clients could be co-enrolled with other interim housing projects and still receive outreach services at the same (co-enrollment). You'll see reference to co-enrollments for the ESG funding stream, but this policy would rely on that language with clarity that it applies to any State of CA funding stream. We do need to discuss the number of days clients who are co-enrolled are anticipated to be in shelter, transitional and/or rapid rehousing.

The HMIS data entry guide for Street Outreach has a couple areas that need to be corrected, so if I can obtain that copy prior to this meeting I'll make those edits and point out where they were corrected so that document can be attached to the primary policy.

Come with any other clarifications you think might be good to put finishing touches on the document so the Committee can approve and prep for the EB meeting September 18th.

ATTACHMENT “D” 9/18/25 NORCAL COC EXECUTIVE BOARD MEETING

NORCAL CONTINUUM OF CARE CA-516

Homeless Street Outreach Policy and Operating Procedures

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## INTRODUCTION

Homelessness is a multifaceted challenge that demands compassion, coordination, and community engagement. Street Outreach can provide a crucial lifeline to individuals experiencing homelessness by building trusting relationships, connecting people to resources, and advocating for both immediate needs and a household's long-term stability. Outreach efforts deploy a Housing-Focused approach that not only provides lifesaving, culturally responsive resources but also supports transitions from unsheltered homelessness directly into crisis housing or permanent housing if available.

## PURPOSE OF THE NORCAL STREET OUTREACH POLICY

The Norcal Street Outreach Policy is designed to support outreach staff with training, resources and to clearly define operational processes across the Continuum of Care counties. The policy establishes consistent, trauma-informed, and evidence-based approaches to outreach programs as well as identifying regulatory data collection practices that respect one's personal privacy and consent. County-level Street Outreach policies may go into further depth from the CoC-approved policy, however the best practices contained within this policy should be observed across the NorCal region, especially as they relate to data disclosure within the local HMIS Security and Privacy Policy.

## GUIDING PRINCIPLES FOR STREET OUTREACH

- **Housing First Principles:** Street Outreach is not just about engagement or service referrals — it's about connecting people directly and assuring service referrals are met with no preconditions like sobriety or treatment participation required to begin the housing process
- **Trauma-Informed Care:** Recognizes the prevalence of trauma among unhoused populations and ensure interactions are sensitive, supportive, and empowering
- **Person-Centered Approach:** Outreach should be guided by the needs, strengths, and goals identified by the individuals themselves
- **Safety:** Ensures the physical and emotional safety of outreach staff and the people they serve
- **Harm Reduction:** Reduces barriers to engagement by offering support without preconditions, acknowledging that one's progress may be non-linear
- **Cultural Competence:** Services must honor the diverse nature of cultural backgrounds, identities, and lived experiences of all individuals
- **Collaborations:** Partner with complementary service providers such as health systems, law enforcement, and community organizations, essential for comprehensive client support
- **Human Dignity:** Recognition that every person deserves to be treated with respect, regardless of their housing status, background, or circumstances

## SCOPE OF OUTREACH ACTIVITIES

Street Outreach for the NorCal Continuum of Care encompasses a variety of housing-focused service activities (italicized service requirements are indicated in the [State of CA Emergency Solutions Grant Program](#)):

- *Evidence-based street engagement services*
- Build trusting relationships by providing ongoing case management and client advocacy
- Engage individuals living unsheltered, in encampments, or in places not meant for human habitation

- Conduct wellness checks to provide basic human necessities such as food, water, clothing, and hygiene kits or supplies, and local access to showers or restrooms
- Provide necessary clothing and blankets, first aid supplies, trash bags for places to dump trash
- *Hygiene services for unsheltered individuals and people living in encampments*
- Connect homeless households with local medical supports, and establish primary care provider relationships
- *Assertive Community Treatment*
- *Intensive Case Management Services*
- Prepare individuals to become housed or enter interim housing solutions for further assistance as desired
- Develop housing plans dependent on the individual's current circumstances and desire for housing
- Assist households to update/obtain identification documents essential for obtaining and complying with leases or obtaining public benefits
- Assess or update information for the NorCal Coordinated Entry system
- *Housing Navigation Services*
- Connecting outreach clients with Miracle Messages for family reunification opportunities, as requested
- *Harm reduction services and coordination with street-based health care services*
- Facilitated connections to mental health care, substance use treatment, and employment services

## Operational Procedures

### Initial Engagement

**Safety First:** Outreach staff should work in pairs or teams and assess situational safety before each contact.

**Introduce Yourself:** Initial introductions should be done clearly and respectfully. Language like “Hi, my name is \_\_\_\_\_. I’m with [agency]. We’re out checking in on folks and offering help for folks living out with housing or service needs.”

**Avoid Uniforms:** However, outreach teams who wear clearly marked clothing helps clients quickly identify who they are and why they may be approaching them. Outreach workers are distinguished from law enforcement, security, or other unknown people, especially for persons who are distrustful of institutions. Logo shirts can establish a sense of legitimacy.

**Nonjudgmental Language:** Focus on individuals, not their circumstances. Avoid language that implies blame, failure, or dysfunction. Reflect empathy, dignity, and choice in tone and words. Work to foster dignity, autonomy, and engagement.

**Client Consent:** Always obtain consent before gathering any personal information, ensuring client consent during Street Outreach is both an ethical obligation and a practical necessity: Consent meets legal and ethical standards, respects a person’s autonomy, avoids re-traumatization and builds trust between outreach staff and homeless households.

## Building Trust

**Consistent Engagement** — Be reliable and predictable, build low-pressure contact routines. People often need to engage with workers multiple times before building trust to engage

**Maintain Confidentiality**— When obtaining consent or answering questions, explain how their information will be used to support them with service and medical referrals, interim housing, and overall case planning. Mention that outreach workers received privacy and security training annually and that information is not disclosed to law enforcement or deportation ICE. Be clear there are limits to confidentiality indicated in the CoC Privacy Policy regarding issues of personal safety and

**Respect Refusal:** “It’s okay if you don’t want to speak today. We’ll be back, or “we come to this area every two weeks etc.”

**Small choices:** Let clients guide engagements and interactions. Even letting people pick the time, location or level of engagement can be empowering.

**Don’t press for details** in early conversations — focus on personal rapport.

## DATA COLLECTION AND REPORTING

Once trust between households and outreach workers is established, explain the purpose of data collection processes and assessment tools like HMIS Enrollments, Current Living Situations, and Coordinated Entry Assessments.

**Gain Informed Consent** from the Client according to the NorCal CoC approved Security/Privacy Policy and Release of Information form for HMIS data collection, compliance and CoC aggregate reporting. Notify clients that they may request and obtain their complete HMIS record(s).

### Note:

*Required HMIS data elements are referenced in the table below and a detailed description of how to record each element may be found in the [HMIS Data Standards Manual 2024](#) (revised June 2025). Changes to future data standards typically occur on a two-year cycle, with the next update projected to be Oct 1, 2025.*

Data Element	Instructions	HMIS Data Standards Reference
Release of Information	Signed Consent allowing service providers working with homeless persons to share personal and related service information with the CoC’s Homeless Management Information System	NorCal CoC approved Release of Information
Project Start Date	Start of client’s period of participation with the Street Outreach Project	HMIS Element 3.10 (p. 60)
Date of Engagement	Date client became ‘engaged’ in project services	HMIS Element 4.13 (p.107)
Current Living Situation	Number of contacts required to engage client and to document current living each time client is contacted	HMIS Element 4.12 (p. 103)
Project Exit	End of client’s participation with a project; must be the last day a contact was made or a service provided	HMIS Element 3.11 (p. 61)

Data Element	Instructions	HMIS Data Standards Reference
Housing Problem Solving	Once relationships are established, provide HPS or Diversion guidance	Custom HMIS
Coordinated Entry Assessment	CoC adopted assessment to determine the housing and service needs of households experiencing homelessness	NorCal CoC approved CES Assessment Tool
Denial of Service	When an outreach worker determines a credible threat to outreach staff, other homeless persons of members of the public	HMIS Case Note

Street outreach workers should also make case notes in the NorCal HMIS of significant interactions with clients that describe their housing/shelter status in an agency's internal program.

Ideally, outreach case notes should incorporate the following information:

- 1) Description of client's geographic location at last service provided
- 2) Description of services provided
- 3) Referrals made to other services (if applicable) Street Outreach data contained in the NorCal HMIS shall serve to inform the following reporting needs:

Review Type	Instructions	Use Case
Individual	Case Notes for ongoing progress, closing process to improve program services	Help Case Managers develop personalized plans that address the unique needs, challenges, and goals of clients
Program Level	CoC and local agency evaluation	Project-level improvement
System Level	Federal and State System Performance Measures; Federal Longitudinal Systems Analysis	System effectiveness and System of Care improvement

## SERVICE COORDINATION

- Refer and connect to services (mental health, substance use, health care, benefits assistance), but always with client consent.
- Use warm handoffs (accompanying or directly introducing the client to the other provider).
- Work with Coordinated Entry staff, shelters, and permanent housing providers to streamline referrals.
- Multidisciplinary outreach
- Warm handoffs across counties

## SYSTEM COORDINATION

NorCal CoC will host quarterly Street Outreach meetings to discuss best practices and client coordination. The goal will be to share updates on outreach policy issues, community resources and program requirements, ensure consistent practices across Counties for client engagement, documentation referrals and safety issues, clarify overlapping services between various teams and review outreach reporting for program improvement.

First Responder connections work together and de-escalate situations where force might otherwise be used, prevent unnecessary incarceration events or emergency medical visits by working on alternatives.

**Commented [tPierce1]:** Periodic Street Outreach worker meetings should be discussed in regard to having a stand-alone workgroup or incorporating into the Coordinated Entry workgroup

## RESOURCE SHARING

Street Outreach Teams will share the following with all other teams:

- Apartment Listings
- Community Connections
- Landlord Listings
- Skill-Building Programs, Job Services
- Real-time Case Conferencing
- Referrals to targeted services like housing application assistance and public benefits
- Transportation Assistance

## CASELOAD RATIOS AND NOTES

State or Federally funded outreach providers will maintain caseloads of 10-14 unsheltered individuals per outreach worker. Caseload sizes will vary depending on the complexity of the individuals they are serving, but outreach teams will strive to serve as many individuals as possible in an authentic and meaningful way. Approximately 60% of a team's caseload will be persons actively working on activities or goals that directly assist the person in progressing toward housing (Housing-Focused). Individuals who are on Coordinated Entry's priority list will be prioritized for housing preparedness and document readiness services. Approximately 40% of a team's caseload will be individuals whose cases are complex and require significant staff time to overcome barriers to permanent or interim housing.

## COORDINATED ENTRY PARTICIPATION

CoC-funded outreach providers must act as a Coordinated Entry External Access Point (CEEAP), offering full access and assessment to the Coordinated Entry System (CES). Street Outreach teams shall to the greatest extent possible, enroll all individuals requesting or needing access to the CES into the Coordinated Entry System by completing the required assessments. If due to staffing shortages or full caseloads the SO team does not have the capacity to enroll an individual presenting for service, the SO team will screen the participant for CE enrollment and refer them to an external access point.

The definition of an External Access point is an Emergency Shelter or Street Outreach project offering Coordinated Entry assessments to ALL participants who present seeking or requiring CES assistance. Assessment interviews and data entry into the CES shall occur regardless of where the individual spends most of their time, enrollment status in any project, provider-client relationship, or population type. An access point will screen each program participant for enrollment in CE when engaging with a client, if the client is not enrolled, the access point will offer assessment and enrollment. The outreach provider will make a case note to ensure the program participant remains active in Coordinated Entry. The access point will also upload a release of information (ROI) to the client's HMIS dashboard.

## CONTINUING CASE MANAGEMENT AND OTHER SERVICES

### (HCD ESG Street Outreach Policy v 5.27.23)

ESG Street Outreach Policies provide language for continued support through Street Outreach and that language is incorporated below, however the following practices may also be used across various funding streams.

X may temporarily continue services for clients who have entered emergency shelter or housing and may retain Street Outreach eligibility if the following criteria are met:

- Client is already enrolled in an ESG-SO project
- Client reasonably expects they will not remain in emergency shelter, housing, or an institution for an extended period dependent on current living situation. NorCal outreach teams can rely on the following guidance for co-enrollment in Street Outreach projects and 'housed' services AND the outreach project reasonably expects the client will end up sleeping outdoors, or in a place not suitable for human habitation upon exit from shelter or an institution within the number of days framework
  - Emergency Shelters –
  - Institutional Situations –
  - Permanent Housing Situations–
- The outreach relationship is needed to maintain the participant in emergency shelters or interim housing
- Services provided by ESG-SO are neither unnecessary nor duplicative

**Commented [tPierce2]:** Committee members comments to finish this area

## DENIAL OF SERVICES

If an unsheltered individual has engaged in behaviors that present credible threats to outreach staff, their property, other clients, or general members of the public, outreach workers may deny services. Service denials must be documented at the agency level and communicated to the individual as soon as it is safe to do so. Service denials may be communicated verbally and may not be permanent.

## CRITICAL NEEDS AND CRISIS RESPONSE

Respond immediately if a client has **urgent health, safety, or behavioral health needs**.

Follow agency protocols for contacting emergency services or mobile crisis teams — and always **debrief with the client afterward** (if possible). Carry basic supplies (water, food, hygiene kits, blankets) and offer to people as a means of engagement, not as a trade for participation.

## DISENGAGEMENT OR TRANSFER PROTOCOL

After multiple attempts with no contact, **document efforts** and update the client's enrollment status in HMIS. Reassign clients to other team members if another worker might be more successful.

Warmly close relationships when a client is permanently housed, unless continued support is part of the model. When possible, if outreach staff know that clients have departed an area and have knowledge of where the person may be living, case notes should be added to the HMIS for other case workers to understand and provide service continuity.

## SAFETY GUIDELINES

- Staff should receive regular training on cultural humility, trauma-informed care, de-escalation, and anti-racism.
- Outreach workers do not carry weapons, and maintain clear boundaries such as no transporting clients without agency policy and no giving out personal contact information – agency or CoC info only.

Always document in the HMIS Case Notes any incident involving aggression, suspected abuse, or other safety concerns.

- Outreach must be conducted in teams of two or more whenever possible.
- Withdraw immediately from any situation that feels unsafe; safety overrides all other priorities.
- Maintain regular check-ins with supervisors or designated contacts.
- Carry communication devices and maintain situational awareness at all times.
- Respect “no-go” zones as determined by safety assessments or community alerts.
- Do not enter encampments, vehicles, or private spaces without explicit permission from the people living there.

## INTERACTIONS WITH LAW ENFORCEMENT

In some circumstances, street outreach staff may witness behavior or actions on the part of an unsheltered person that triggers a legal mandate to report the incident to law enforcement (e.g. human trafficking). Street outreach staff will do so promptly and thoroughly in these instances, in accordance with NorCal HMIS Privacy and Security policies on mandated reporting.

Except when required to do so through mandated reporting, street outreach staff shall never be the entity responsible for communicating or leading enforcement activities. Whenever possible, street outreach staff shall be available to assist unsheltered homeless individuals in the event law enforcement engages in activities that dislodge the individual(s) from where they are staying, when notified by law enforcement in advance of enforcement activities.

Efforts shall be made by street outreach staff, while balancing existing caseloads, to make referrals and help the individual connect to resources in the event of enforcement activities.

Street outreach staff are present to assist the homeless individual only, and are not engaged in any enforcement activities themselves. When there is a planned closure of an encampment, or outreach becomes aware of high frequency of law enforcement activity with particular individual(s), street outreach shall provide advanced targeted outreach efforts, and provide information on their efforts when consents are in place to do so, without providing personal identifying information to law enforcement. In some cases, local law enforcement has embedded teams that are focused on trauma-informed response to homelessness or related special populations.

### Note:

As of August 23, 2025, best practices stress that outreach clients should be made aware of current privacy practices. ICE may be gaining access to some Medicaid enrollment data, but this does not override the standard HMIS client confidentiality protections. State and local laws offer additional protections for client data so county-level street outreach teams should stay up to date on local laws as well.

## STAFF TRAINING AND SUPPORT

All outreach team members shall receive ongoing training on the following topics:

- Ethical boundaries and confidentiality standards
- Resource navigation and local service directories
- Trauma-informed care and crisis intervention

- Housing Problem Solving and Diversion
- De-escalation and conflict resolution
- First aid, naloxone use, and personal safety protocols
- Cultural humility and anti-racism

Supervision at the agency level should be provided to support staff well-being and prevent burnout.

### **PROGRESS TRACKING – PROGRAM IMPROVEMENT**

Street Outreach programs will utilize the following HMIS data points to strengthen program design and delivery:

- Project Entries – enrolling as many people as possible who are currently unsheltered or in literal homelessness
- Dates of Engagement – measures how long it takes to establish rapport and engage clients in housing-focused services
- Timely Exits – based on the last service provided at the 30-day mark
- Exits Housed Situations – Positive exits from outreach reflect that the programming approach honored the person’s individual goals and needs, rather than leaving them where they started; positive exits for the State of CA are to any living situation better than living on the streets, for the federal definition are to Permanent Housing projects (see CA SPM’s guides)

### **ETHICAL CONSIDERATIONS**

- Respect each individual’s right to privacy and confidentiality.
- Ensure that participation in outreach services is always voluntary and never contingent on specific behaviors.
- Be aware of and responsive to the power dynamics inherent in outreach work.
- Challenge stereotypes and advocate against the discrimination or criminalization of unhoused people.

### **EVALUATION AND CONTINUOUS IMPROVEMENT**

- Establish metrics for tracking engagement, service connections, housing placements, and client satisfaction.
- Solicit regular feedback from clients, partners, and staff to identify strengths and areas for growth.
- Review and update outreach protocols annually to reflect evolving best practices and local needs.

### **CONCLUSION**

A thoughtful Homeless Street Outreach Policy is essential for creating pathways out of homelessness and building healthier, more inclusive communities. By centering dignity, partnership, and innovation, outreach teams play a vital role in addressing both the immediate and systemic needs of society’s most vulnerable members. The ongoing commitment to learning, adaptation, and collaboration ensures that street outreach remains a source of hope, empowerment, and tangible change.

## Appendix

### Street Outreach Types (from [Housing Focused Street Outreach Framework – National Alliance to End Homelessness](#))

Term
General Street Outreach
Clinical Street Outreach
Subpopulation-Focused Outreach
Local Community-Based Outreach
Direct Encampment to Housing Outreach
Placed-Based Outreach
Crisis Response Outreach
Non-Crisis Law Enforcement Homeless Outreach (HOT)

### Key Terms Used

Term	Definition
Caseload Ratios	Caseload ratios are important for understanding the demands placed on staff and for ensuring adequate resources are available to meet client needs
Continuum of Care HUD	A community entity, organized and managed by the U.S. Department of Housing and Urban Development (HUD), to address homelessness through a coordinated system of housing and services
Coordinated Entry Assessment	The use of a consistent set of questions and tools to gather information about a person's housing history, service needs, and level of vulnerability to further prioritize households most in need of housing resources
Grassroots Outreach	Grassroots outreach prioritizes the involvement of ordinary citizens and community members in a movement or campaign.
Housing-Focused Problem Solving	Techniques used to assist clients creatively think about all options of safe housing that may be available to them, including tapping into social and/or family networks or gaining additional system resources such as financial assistance, mediation, transportation etc.
Housing-Focused Street Outreach	Housing-focused street outreach is a method of engaging with people experiencing homelessness by prioritizing their connection to stable, permanent housing. It differs from traditional outreach, focused on providing basic needs and connecting individuals with emergency shelters, by directly linking individuals with housing solutions.
Homeless Management Information System	HMIS, required data entry system by grantees being funded by CoC, ESG or selected State of CA grants

Term	Definition
Miracle Messages	San Francisco based nonprofit organization focused on rebuilding social support systems for people experiencing homelessness. They achieve this primarily through family reunification services, a phone-based buddy system, and direct cash transfer programs.
Non-Traditional Partners	In the context of addressing homelessness, non-traditional service partners refer to organizations, agencies, or individuals not primarily focused on providing direct homeless services, but who still play a valuable role in supporting people experiencing homelessness. Examples include law enforcement, libraries, health-care providers, insurance companies, communities businesses who contribute food, clothing or entrepreneurship training
Population-Specific Outreach	Health and social service providers actively connect with and provide support to specific groups within a community, aiming to improve their health and well-being, often targets populations experiencing health disparities or facing barriers to accessing care

## Documentation Types

Street Outreach workers play a critical role in **helping people experiencing homelessness obtain personal identification**, which is often a **major barrier to accessing housing, benefits, healthcare, and employment**. Many individuals lose their documents while living unsheltered, or they were never issued some of them in the first place. Outreach workers will assist willing clients to acquire documents for housing opportunities and eligible public benefits.

Document Name	Where to obtain
Birth Certificate	Required to obtain State ID, Driver's License or Social Security Card, required for some healthcare applications
CalFresh Card	
DD-214	Veteran Discharge needed to access VA Services, VASH vouchers and veterans-only programs
Photo Identification (State Issued ID or Driver's License)	Required for housing applications, public benefits, employment banking, voter registration and medical care
School/foster Care Records	For youth supports eligibility for some youth-specific housing or services
Service Animal Support Documentation	Letter from a licensed mental health professional
Social Security Card	Required for HUD funded housing programs, applications for job and public benefits (SSI, SSDI/Medicaid, SNAP etc
Tribal ID	May be used in place of state issued ID for some services; completion of tribal enrollment in federally recognized tribe
Verification of Disability (medical or mental health)	Required for verify disability for Perm Supportive Housing Programs

## Communication Approaches

Resistance often drops when people see how the idea supports what they care about. Help them connect your proposal to their goals, identity, or mission. These helpful phrases may be used to increase service engagement:

“How can I support you today?”  
 “What’s important to you right now?”  
 “Would it be okay if I asked you a few questions about your needs?”  
 “You deserve safe and stable housing.”  
 “There are no conditions to this support — we’ll work with you wherever you are.”  
 “I’ll keep showing up if that’s okay — we’re here when you’re ready.”  
 “You have the right to choose what works for you.”

Judgmental Language	Non-Judgmental Language
“That’s not how the system works.”	“Let’s walk through the process together — I know it can be confusing.”
“What’s wrong with you?”	“Is there anything you’d like support with today?”
“Why are you still out here?”	“Is there anything that’s made it hard to connect to housing or shelter?”
“You don’t seem serious about getting help.”	“I understand that things take time — I’ll keep checking in if that’s okay.”
“You have to follow the rules to get services.”	“Here’s what we can offer right now, and you’re welcome to accept what works best for you.”
“You missed your appointment again.”	“We didn’t see you at your appointment — would you like help rescheduling?”
“You need to get sober first.”	“We can help you find housing that works for where you’re at right now.”
“You’re homeless.”	“You’re currently experiencing homelessness.”
“You’re non-compliant.”	“It looks like this option didn’t work out — let’s see what we could do that might be a better fit.”
“You’re refusing services.”	“Sounds like today isn’t a good time — would it be okay if I check back in later?”

## Sources:

1. [Housing Focused Street Outreach Framework](#) (National Alliance to End Homelessness)
2. [Emergency Solutions Grant Street Outreach Policy](#) (Housing and Community Development - State of California) v. 5.27.23