

## Pursuing HMIS 2.0

**January 15<sup>th</sup> 2015 Update**

Greetings. This is our fifth HMIS 2.0 update for stakeholders across Minnesota. The last update was provided in August 2014—much has happened since then, our apologies for the gap in communication. The purpose of this update is twofold: (1) to provide information about actions taking place to transform the Homeless Management Information System—HMIS and (2) to seek your feedback and suggestions to guide efforts moving forward. Thank you for taking the time to review our update. All comments, suggestions, questions can be directed to Mike Manhard at [mike@mesh-mn.org](mailto:mike@mesh-mn.org). Thank you.

*The HMIS Interim Planning Team*

The Interim Planning Team (IPT) is the group formed by the HMIS Technical Assistance Team and is charged with:

- Receiving and reviewing findings and recommendations from the HUD TA Team
- Sharing and processing recommendations with the broader group of Minnesota stakeholders
- Obtaining input from Minnesota’s stakeholders
- Providing feedback on suggested changes to the HMIS TA team and making decisions as needed to move recommendations forward

The IPT formed two workgroups in March 2014 (Governance & Lead Agency—GALA, Data Structure & Sharing—DSS). The IPT has since convened a third workgroup in November 2014 (Finance Plan). These workgroups have met at least monthly to move HMIS 2.0 efforts forward. Below is a summary of their progress.

### **Governance and Lead Agency (GALA) Workgroup<sup>1</sup> Update**

The Governance and Lead Agency (GALA) subgroup is charged with recommending to the IPT a new HMIS governance structure.

The GALA workgroup reached a significant milestone in its work on December 19, 2014, when it submitted a draft **Charter** and **By-Laws** to stakeholders. The Charter and By-Laws would recognize Minnesota Housing, acting on behalf of Minnesota’s Interagency Council on Homelessness, as Minnesota’s HMIS Lead Agency, advised by a 15-member Task Force. The Task Force would include representatives of CoCs (4), State agencies (3) and tribes (1), along with 7 at-large community representatives. In addition to these governance documents, each CoC would enter into an MOU designating Minnesota Housing as its Lead Agency.

With minor changes, these documents were approved by a vote of the CoCs and state agencies on January 9<sup>th</sup>, 2015. The next step is approval of Minnesota Housing’s Board of Directors, which we anticipate at its meeting on January 22<sup>nd</sup>. Once the structure is approved, members of the Task Force will be appointed and the transition process will begin.

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<sup>1</sup> GALA Workgroup membership and meeting schedule are listed at the end of this document.

Over the next 2-3 months, the Governing Group will continue to conduct the business of advising Minnesota's HMIS. The Task Force, Lead Agency, HUD and Wilder will work with the IPT to further define their respective roles and responsibilities (a draft of which is attached to this report). We expect the Governing Group to conclude its work and the Task Force to assume its responsibilities in April.

### **Data Structure & Sharing (DSS) Workgroup<sup>2</sup> Update.**

The DSS Workgroup is charged with advancing system changes within HMIS in order to improve the system's ability to meet Minnesota's new needs. There are three primary focus areas that the DSS Workgroup is currently pursuing. A summary of each of these focus areas is provided below.

#### **Data Structure**

The DSS is pursuing data structure changes similar to those recommended in the HMIS technical assistance recommendations. For more information about the benefits we are seeking in data structure changes, please refer to the attached document (Local HMIS Lead Agency System Admin Memo FINAL at [www.hmismn.org/planning](http://www.hmismn.org/planning)). A detailed workplan was developed in early August that initially targeted mid-November 2014 as the completion date for restructuring the MN HMIS database. As with any major project, steps to do not all proceed as planned. Our workplan has been amended a number of times to accommodate local planning delays, system issues we had not initially identified, and Bowman System actions that were more complex than we had anticipated.

*System Actions:* Thanks to the financial support of the Heading Home Minnesota Funders Collaborative, Bowman Systems entered into a statement of work with Wilder Research and is currently performing a 14-week workplan to successfully restructure our HMIS database. Bowman Systems has indicated that this project is the most complex statement of work they have ever conducted. Wilder Research is working closely with Bowman Systems as they continue to perform the restructure. It is anticipated that the final structure changes will no later than March 23<sup>rd</sup>, 2015. In addition:

- The DSS is soliciting 1-2 agencies per CoC region to test the structure changes on a demo site. Interested agencies should contact their CoC coordinator or [mike@mesh-mn.org](mailto:mike@mesh-mn.org). Training and support will be provided.
- It is anticipated that there will be some glitches in the initial structure changes, thus we are planning on a 2<sup>nd</sup> (smaller) statement of work with Bowman Systems to take place within 3-4 weeks of the initial changes.

*Trainings:* Again, thanks to the support of the Heading Home Minnesota Funders Collaborative, trainings are being developed with the support of experts from Michigan to help all users of HMIS (endusers, system admin, etc) become familiar with the new changes in HMIS. Endusers and agencies should be prepared for significant changes to data entry. While there are many benefits that the system changes will bring, the initial adjustments to the new system are likely going to require time and patience. Teresa Howard ([teresa.howard@wilder.org](mailto:teresa.howard@wilder.org)) will be scheduling trainings prior to the structure changes. Please be on the lookout for these trainings.

#### *Other System Restructure Actions:*

- With the help of the experts noted earlier from Michigan, the DSS Workgroup developed Policies and Protocol for the Local System Administrator in late 2014. This document clearly defines the obligations and responsibilities of the Local System Administrator (LSA) role. Please visit [www.hmismn.org/planning](http://www.hmismn.org/planning) to review this document.

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<sup>2</sup> DSS Workgroup membership and meeting schedule are listed at the end of this document.

- All users of HMIS are expected to sign (at least) two agency agreements **no later than January 30<sup>th</sup>** to accommodate the system structure changes. **It should be noted that both documents are non-negotiable (they cannot be edited by participating agencies) and are required for use in HMIS.**
  - **Local System Administrator Agency Agreement (LSA-AA):** This document is needed to allow Local System Administrators (LSAs) access to the HMIS system. In this role, LSAs will provide administrative support for end users and will produce reports for their CoC region. This document provides the legal agreement needed to protect both agencies and LSAs in fulfilling their data privacy responsibilities in HMIS related to the LSA function.
    - Agencies whose primary mission is to serve victims of domestic violence, sexual violence, and trafficking are exempt from this requirement.
    - Agencies that have programs in multiple CoC regions are required to sign agency agreements for each CoC.
    - LSAs/CoCs will collect all LSA-AAs. If you have not been contacted by your CoC, please connect with [mike@mesh-mn.org](mailto:mike@mesh-mn.org).
    - The CoC coordinator, LSA, SSA (Wilder Research), and agency will all keep a copy of the signed agreement.
  - **Wilder HMIS Agency Agreement and Forms (SSA-AA):** All agencies using HMIS currently have an agreement in place with the SSA (Wilder Research). The SSA-AA has been amended to include language indicating that data sharing will be part of the system.
    - All agencies using HMIS are required to sign this document with Wilder Research.
    - There are no exemptions to the requirement to sign this agreement.
    - LSAs/CoCs will collect all SSA-AAs no later than **January 30<sup>th</sup>**, except those from complex agencies (with programs in multiple CoC regions). If you have not been contacted by your CoC, please connect with [mike@mesh-mn.org](mailto:mike@mesh-mn.org).
    - Complex agencies (with programs in multiple CoCs) are required to sign this document only once. Please return it to [mike@mesh-mn.org](mailto:mike@mesh-mn.org).
    - The SSA (Wilder Research) and agency will all keep a copy of the signed agreement.

### **HMIS Data Sharing Pilot**

Building off the HMIS Data Pilot that met in 2013 (See Data Sharing Workgroup Summary at [www.hmismn.org/planning](http://www.hmismn.org/planning)) the DSS has convened a group of agencies from across the state to participate in a Data Sharing Pilot. In total, there are 9 teams, 47 agencies, and over 60 end users representing 7 of the 10 CoC regions that will participate in the Pilot. The Pilot Group initially convened in August 2014. We quickly determined that the Pilot could not actually begin (in HMIS) until the data structure changes had occurred. This has tested the patience of Pilot participants. In the meantime, the Pilot has met monthly to:

- Meet with legal experts to understand the release of information (ROI) and its role in allowing for data sharing.
- Develop a script for introducing data sharing to clients.
- Identify the data elements that will be included in the data sharing pilot.
- Develop a Pilot evaluation plan.
- Draft data sharing protocol.

The Pilot will begin conducting a baseline study to compare time cost/savings pre- and post-data sharing. The baseline study will be conducted for two weeks in late January-February. The Pilot will also begin using the data sharing script and release of information in early February. Clients in the Pilot will be invited to sign the ROI at this time. While data sharing will still not begin within HMIS until after the data structure changes, begin to use

the script and ROI in February will allow Pilot teams to identify and address any concerns with these documents prior to including the changes in HMIS.

The Pilot will go “live” following the data structure changes (in April). We are planning for a 3 month pilot period once in HMIS. Pilot members will then share lessons learned and other results with all HMIS stakeholders at the end of the Pilot. State-wide implementation of data sharing is likely to start shortly thereafter.

### **VI-SPDAT and Other New Functions/Modules**

The DSS Workgroup has prioritized the purchase and introduction of new functions and modules (many of which will greatly enhance coordinated assessment efforts) as quickly as possible once the data structure changes have occurred. As an initial step in this direction, the DSS and Wilder Research have researched and identified steps that can make VI-SPDAT available for appropriate agencies in all CoC regions in Minnesota. Please see (*VI-SPDAT initial roll out planning for CoC Coordinator meeting.doc*) attached to this message or at [www.hmismn.org/planning](http://www.hmismn.org/planning). Other functions and modules have been identified to be purchased and integrated within HMIS as quickly as possible after the system restructure. Implementation of new modules/functions may occur on a state-wide basis or may be introduced by CoCs using their new LSA role.

### **Finance Plan Workgroup<sup>3</sup> Update.**

This workgroup is still in its formative stage. A charter document has been created to guide the tasks of the workgroup. The workgroup has set the goal of creating a summary document with budget/finance recommendations for our new HMIS within 6 months. This complete budget for HMIS 2.0 operation will include projections and recommended funding solutions for user license fees and staff time for data entry & transaction processing. We expect to hear exciting things from this workgroup in the coming months.

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<sup>3</sup> DSS Workgroup membership and meeting schedule are listed at the end of this document.

## Planning Groups Rosters and Meeting Schedules

### Interim Planning Team (IPT)

**Membership:**

Member Category	Designee	Affiliation
CoC (Urban)	Jim Anderson	Ramsey CoC
CoC (Rural/Greater MN)	Carla Solem	West Central & NW CoC
CoC (Rural/Greater MN)	AG Lynch	Central CoC
CoC (Suburban)	Rebecca Bowers	SMAC CoC
MHFA	Ji-Young Choi	MHFA
MICH Representative	Cathy ten Broeke <sup>4</sup>	State of MN
HHM/Funders	Laura Kadwell	Heading Home MN
HMIS Governing Group	Kathy Vitalis	MAC-V
State DHS	Mary Orr	DHS
HMIS Data Sharing Group	Mike Manhard <sup>5</sup>	MESH
End-user/Tech	Ben Van Hunnik <sup>6</sup>	Hearth Connection

**Primary Contact:**

Mike Manhard  
612-750-1474  
[Mike@mesh-mn.org](mailto:Mike@mesh-mn.org)

**Meeting Schedule:**

1<sup>st</sup> Monday of the month 3:00-5:00pm

### HMIS Governance and Lead Agency (GALA) Workgroup

**Membership:**

Member Category	Designee	Affiliation
CoC	Jim Anderson	Ramsey CoC
CoC	Kristen Brown	Hennepin County
CoC	Laura DeRosier	St Louis CoC
CoC	Justin Vorbach	SW MN CoC
Stakeholder	David May	Red Lake Nation
Stakeholder	Becky Melang	Corporation for Supportive Housing
Stakeholder	Laura Kadwell	Heading Home MN
Stakeholder	Colleen Schmitt	Day One
Stakeholder	Kathy Vitalis	MAC-V
Stakeholder	Patrick Troska	Jay & Rose Phillips Foundation
Stakeholder	Liz Kuoppala	Minnesota Coalition for the Homeless
State	Cathy ten Broeke	State of MN
State	Mary Orr	State of MN—DHS
State	Kim Bailey	State of MN—MN Housing

**Primary Contact:**

Laura Kadwell  
612-721-3700 ext. 112  
[laura.kadwell@headinghomeminnesota.org](mailto:laura.kadwell@headinghomeminnesota.org)

**Meeting Schedule**

1<sup>st</sup> Monday of the month 1:00-3:00pm  
3<sup>rd</sup> Wednesday of the month 3:00-5:00pm

<sup>4</sup> IPT Chair

<sup>5</sup> IPT Lead Contact

<sup>6</sup> Ben exited the IPT in July due to a job transition.

**Finance Plan Workgroup**

**Membership:**

Member Category	Designee	Affiliation
Stakeholder	Steve Horsfield <sup>7</sup>	Simpson Housing Services
Stakeholder	Hank Fagley	Catholic Charities
Stakeholder	Kathy Vitalis	MAC-V
Stakeholder	Kathy Berg-Hansen	Salvation Army
State	John Patterson	State of MN—MN Housing
State	Lee Buckley	State of MN--DOC
State	Jane Lawrenz	State of MN—DHS
State	Isaac Wengerd	State of MN—DHS
State	Jennifer Trombley	State of MN—DHS
HUD TA Consultant	Chuck Kieffer	Cloudburst

**Primary Contact:**

Steve Horsfield  
 612-455-0841  
[shorsfield@simpsonhousing.org](mailto:shorsfield@simpsonhousing.org)

**Meeting Schedule:**

3<sup>rd</sup> Thursday 11:30am-1pm

**HMIS Data Structure and Sharing (DSS) Workgroup**

**Membership:**

Member Category	Designee	Affiliation
Business Analyst	Shweta Singhal	State of MN—MN Housing
CoC	Carla Solem	NW & West Central CoC
CoC	Lisa Thornquist	Hennepin County
CoC	Mary Ulland-Evans	SE MN CoC
CoC	Rebecca Bowers	SMAC CoC
HMIS Administrator	Teresa Howard	Wilder Research
HMIS Administrator	Laura McLain	Wilder Research
HMIS Administrator	Colleen O’Brien	Wilder Research
Stakeholder—Project Manager	Mike Manhard <sup>8</sup>	MESH
Stakeholder	Sue Speakman-Gomez	HousingLink
Stakeholder	Brian Rogers	Salvation Army
State	Ji-Young Choi	State of MN—MN Housing
State	Diane Elias	State of MN—MN Housing
State	Tony Peleska	State of MN—MN Housing
State	Pat Leary	State of MN—DHS
State	Tom Balsley	State of MN—DHS
HMIS TA	Barb Ritter	State of Michigan HMIS
HMIS Vendor	Tim Hockaday	Bowman Systems
HMIS Vendor	Candice Hacker	Bowman Systems

**Primary Contact:**

Mike Manhard  
 612-750-1474  
[mike@mesh-mn.org](mailto:mike@mesh-mn.org)

**Meeting Schedule:**

1<sup>st</sup> Monday of the month 10:00am-12:00pm  
 3<sup>rd</sup> Wednesday of the month 3:00-5:00pm

<sup>7</sup> Workgroup chair

<sup>8</sup> Workgroup chair