Lived Experience Advisory Committee Meeting
April 2, 2025

Welcome and Meeting Overview

Agenda

CONSENT CALENDAR

1. Approve the Lived Experience Advisory Committee (LEAC) Meeting Minutes from March 5, 2025.

BUSINESS CALENDAR

1. **Continuum of Care (CoC) Updates –** Felicia Boehringer, CoC Administrator, Office of Care Coordination
   a. March 26, 2025, CoC Board Meeting Recap
2. **Homeless Management Information System (HMIS) Policies and Procedures Recommended Changes** – Erin DeRycke, Director, Data Analytics, 2-1-1 Orange County (211OC), Orange County United Way and Felicia Boehringer, CoC Administrator, Office of Care Coordination .
   a. Approve the recommended revisions to the HMIS Policies and Procedures, inclusive of the Client Record Requests, Data Use and Disclosure, Data Integration, and Data Release policies, as well as updates to the Client Consent Form, and Privacy Notice, as recommended by the Orange County HMIS Policies and Procedures Working Group, for review and approval by the Policies, Procedures and Standards Committee.

Public Comments

LEAC Member Comments

Consent Calendar

Consent Calendar

Recommended Action

1. Approve the Lived Experience Advisory Committee (LEAC) Meeting Minutes from March 5, 2025.

Business Calendar

CoC Updates

Felicia Boehringer, CoC Administrator,

Office of Care Coordination

Business Calendar – Item #1

CoC Board Updates (March 26, 2025, Meeting)

1. **CoC NOFO**
   a. Provided updates on the Fiscal Year (FY) 2024 CoC Program Notice of Funding Opportunity (NOFO)
   b. Appointed Andrew Crowe, Shakoya Green Long, Sanda Lozeau, Jason Mercado and Larry Smith to the FY 2025 CoC Program NOFO Ad Hoc.

2. **HMIS Data Requests**
   a. Approved UCI's HMIS data request for the purposes of research being conducted and shared publicly, in partnership with Orange County United Way.
   b. Approved Office of Care Coordination HMIS data request for ongoing monthly release of key data related to the engagement and changes within the Orange County CoC.
   c. Approved St. Joseph Orange County Justice Center's HMIS one-time, used for education and advocacy purposes in support affordable housing development in the City of Orange.

3. **Orange County Housing Process Presentation**

4. **Housing for Health Orange County (HHOC) HMIS Data Integration Request**
   a. Approved data integration request from HHOC's to import identified data elements into HMIS every 24 hours, beginning April 1, 2025.

OC Same Day Solutions Fair

- The Office of Care Coordination hosted the **OC Same Day Solutions Fair** last week, **Thursday, March 27, 2025,** from **9:00 a.m. – 2:00 p.m.** at the **Second Baptist Church.** It provided support and assistance in a convenient, accessible manner as a result of bringing multiple resources together in one location.

- This collaborative effort provided immediate on-site support to individuals experiencing homelessness by offering a range of services such as legal and document assistance, healthcare, housing resources, and workforce development. Furthermore, this event bridges connections to long-term solutions such as case management, rehabilitation services, and legal avenues for resolving outstanding issues.

- Thank you to members of the LEAC who joined to support and offer feedback!

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Business Calendar – Item #2

FY 2024 CoC Program Award Announcement

- On Friday, January 17, 2025, U.S. Department of Housing and Urban Development (HUD) announced nearly $3.6 billion in homeless assistance funding to communities nationwide. HUD noted that the awards were the first of two FY 2024 CoC Program funding award announcements.

- On March 28, 2025, HUD announced the second round of CoC Program funding awards for over $53.1 million. As a result of HUD extending application deadlines for disaster impacted areas, this is the second round of awards made under the FY2024 CoC Notice of Funding Opportunity (NOFO). The states included in the second round of awards are Florida, North Carolina, Tennessee, and Texas.

- The Orange County CoC projects awarded funding in FY 2024 include:
  - ❖ 21 renewal housing projects
    - ○ 2 joint transitional and rapid rehousing (Joint TH-RRH) projects
    - ○ 2 rapid rehousing (RRH) projects
    - ○ 17 permanent supportive housing (PSH) projects
  - ❖ 1 renewal Supportive Services Only – Coordinated Entry (SSO-CES) project
  - ❖ 1 Homeless Management Information System (HMIS) project

- The Office of Care Coordination, as the Collaborative Applicant, will conduct an analysis in order to understand the impact of the renewal projects in Tier 2 that were not funded.

Emergency Housing Voucher (EHV) Program

- On March 11, 2021, the American Rescue Plan (ARP) Act of 2021 was signed into law, creating the EHV program and funding for approximately 70,000 EHVs nationwide.

- These vouchers are used to assist families that are in one of the following categories:
  - Experiencing homelessness;
  - At risk of experiencing homelessness;
  - Fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking; or
  - Were recently homeless and for whom providing rental assistance will prevent the family's homelessness or having a high risk of housing instability.

- HUD announced EHV awards on May 10, 2021, and the Orange County Housing Authority (OCHA) was allocated 557 EHVs.
  - Referrals to the EHV Program ended for OCHA on 9/30/23.

Business Calendar – Item #1

Emergency Housing Voucher (EHV) Program

- On March 6, 2025, HUD sent a letter to Public Housing Agencies (PHAs) administering the EHV program which informed PHAs that the EHV program would receive final a funding allocation in April 2025. PHAs were also informed not to expect any additional funds to support the program.

- Without this funding, OCHA estimate that approximately 440 households will be at risk of losing their rental subsidy and becoming homeless in 2026.

- In addition to OCHA, the additional PHAs; Anaheim Housing Authority, Garden Grove Housing Authority, and Santa Ana Housing Authority also have EHV allocations.

- OCHA is currently working with the County's Legislative Affairs office and Townsend Public Affairs to identify the impact.

Business Calendar – Item #1

Training Opportunity: Mental Health Services Act (MHSA) Training

The Office of Care Coordination, and in partnership with the Health Care Agency is hosting a training on how CES participants can become Mental Health Service Act (MHSA) certified.

There is no registration required. Please refer to the Zoom details below:

- **Date**: Thursday, April 10, 2024
- **Time**: 1:00 p.m. - 2:00 p.m.
- **Meeting Link via Zoom**: https://zoom.us/j/6475714255?omn=94485784883
- **Meeting ID**: 647 571 4255
- **Join by phone**: +1 669 900 9128

If you have questions or difficulty accessing the training on Zoom, please email the Office of Care Coordination at CoordinatedEntry@ocgov.com.

FY 2024 Youth Homeless Demonstration Program Notice of Funding Opportunity

- On January 13, 2025, HUD announced the release of the FY 2024 Youth Homeless Demonstration Program (YHDP) NOFO with a submission deadline of April 17, 2025.

- On March 3, 2025, Joe Colletti, consultant with The Hub for Urban Initiatives, shared that a request for an update on the FY 2024 YHDP NOFO was sent through the YHDP Demo Ask A Question (AAQ) Line, and the following response was received:

  - "Pursuant to the recent Executive Orders, HUD has removed the FY24 YHDP NOFO. At this time, we do not have specific information to share regarding when the NOFO will be posted again. Future updates and announcements will be shared through the YHDP listserv. Thank you."

- As of now, the NOFO is no longer accessible on Grants.gov and there has been no public communication from HUD on the status of the grant opportunity.

HHAP Program Round 6 Changes and Updates

- On Monday, February 24, 2025, the California Department of Housing and Community Development (HCD) announced the release of the HHAP Round 6 Notice of Funding Availability (NOFA), making available $760 million to strengthen regional housing solutions.

- HHAP Round 6 Allocations for the Orange County Region are included below:
    - ❖ County of Orange – $8,355,062.07
    - ❖ Orange County CoC – $8,923,349.94
    - ❖ City of Anaheim – $5,947,854.53
    - ❖ City of Irvine – $5,947,854.53
    - ❖ City of Santa Ana – $5,947,854.53

- **Application Deadline**: August 29, 2025

Business Calendar – Item #1

HHAP Program Round 6 Changes and Updates

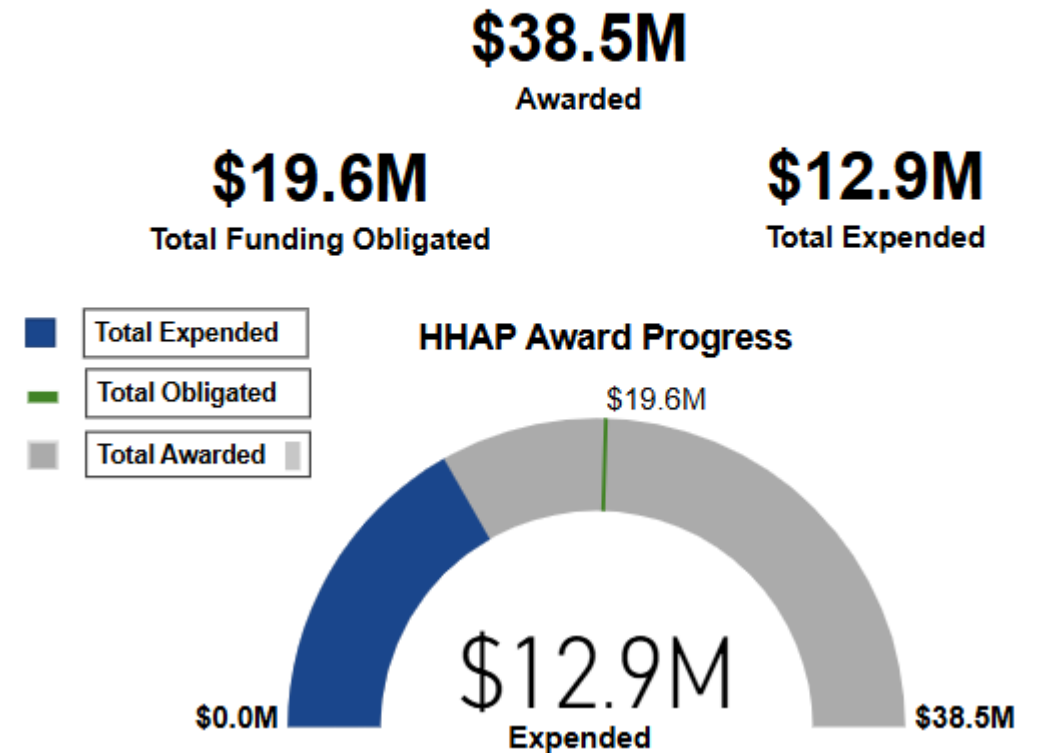Notable Changes in Round 6 NOFA include:

- Every proposed HHAP 6 funding activity must be included under **the System Performance Measures and Improvement Plan** as a key action

- **Purpose and Program Objectives**: Ensure all cities and counties in the region are addressing existing unsheltered homelessness, including encampments, and preventing future homelessness
  - Jurisdictions must adopt compliant housing elements and implement their respective housing element programs, resolve and avoid state housing law violations, and implement practices to utilize surplus land for the production of affordable housing.

- **Regional Partner's Roles and Responsibilities**: Identify the number of encampments identified within the region, with specific plans to address these encampments.

- **Housing Element**: Indicate that each city and county Eligible Applicant has implemented all programs in their adopted housing element on the timelines identified in the housing element, or if they have not, provide a timeline and plan to implement the past due programs.

- **Annual Progress Report**: Indicate that each Large City and county Eligible Applicant has submitted a timely and complete annual progress report for, at a minimum, the previous two years.

HHAP Program Funding Updates

- The HHAP Dashboard reflects the progress of grantees on their HHAP awards.

- Each jurisdiction must submit monthly reports that require them to self-report total obligations and expenditures against their HHAP awards. These reports are cumulative and represent all fiscal activity within each round of HHAP.

- The HHAP dashboard can be accessed at: https://www.hcd.ca.gov/planning-and-community-development/housing-open-data-tools/hhap-data-dashboard-and-downloads

Santa Ana, Anaheim/Orange County CoC

$38.5M Awarded

$19.6M Total Funding Obligated

$12.9M Total Expended

HHAP Award Progress

2025 Homeless Survey

- The results of the Orange County 2024 Point in Time highlighted the number of persons experiencing unsheltered homelessness for the first time in the past 12 months.

- To explore the complex issues facing people who are experiencing homelessness for the first time in the past 12 months, the Office of Care Coordination will be focusing the 2025 Homeless Survey on this subpopulation to help better understand the causations of homelessness and identify areas for improvement.

- The County of Orange (County) worked closely with City Net to formulate the survey questions and design the survey implementation methodology.

- In March 2025, City Net began conducting the 2025 Homeless Survey.

OC Coordinated Entry System (CES) Academy

- On March 11, 2025, the Office of Care Coordination as the Orange County CES Lead, announced the launch of the OC CES Academy, a training platform, and the launch of the CES 101 training module.

- The CES 101 training module is an introductory course that will provide an overview of CES.

- The OC CES Academy will continue to evolve over time to include training modules for Access Points and Housing Providers that will focus on specific CES processes and procedures, as the need arises for additional CES tools and resources, and when CES policies and practices change.

- To view OC CES Academy, visit https://egovoc.com/ces-training/, where you can register to create an account or continue as a guest.

PROMOTED COURSES

Resource Library and FAQs

CES 101

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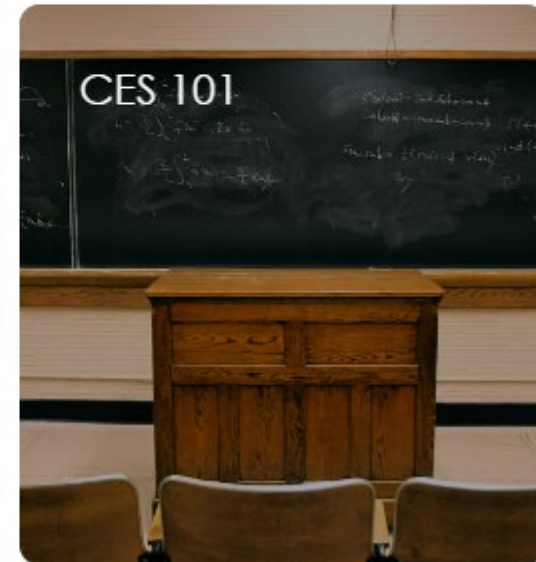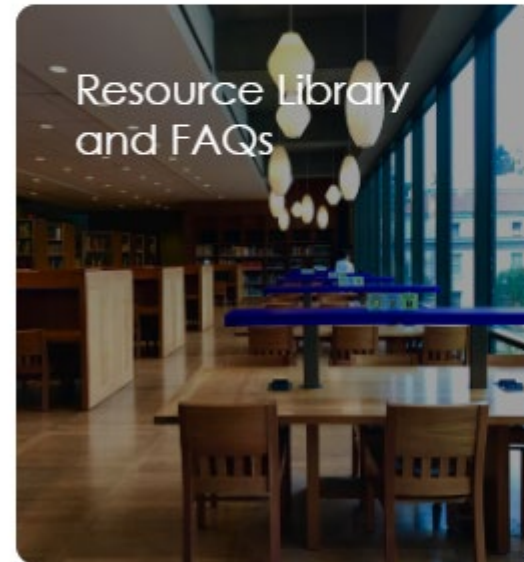
Business Calendar – Item #1

Upcoming Meetings

- **Policies, Procedures, and Standards Committee :** Tuesday, April 8, 2025, from 3:30 p.m. – 5:00 p.m.
  - ❖ <u>Location</u>: County Administration South (CAS) Multipurpose Room 103/105, 601 N. Ross St., 1st Floor, Santa Ana, CA 92701

- **Housing Opportunities Committee:** Wednesday, April 9, 2025, from 10:00 a.m. – 12:00 p.m.
  - ❖ <u>Location</u>: Orange County Housing Authority (OCHA) 1501 E. St. Andrew Pl., 1st Floor, Conference Room A., Santa Ana, CA 92705

- **Service Provider Forum:** Wednesday, April 16, 2025, from 9:00 a.m. – 11:00 a.m.
  - ❖ <u>Location</u>: To be determined.

- **Commission to Address Homelessness:** Wednesday, April 16, 2025, from 1:00 p.m. – 3:00 p.m.
  - ❖ <u>Location</u>: CAS County Conference Center, 425 West Santa Ana Blvd., Room 104/106, Santa Ana, CA 92701

- **CoC Board Meeting:** Wednesday, April 23, 2025, from 2:00 p.m. – 5:00 p.m.
  - ❖ <u>Location</u>: County Administration South (CAS) County Conference Center, 425 West Santa Ana Blvd., Room 104/106, Santa Ana, CA 92701

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Homeless Management Information System (HMIS) Policies and Procedures Recommended Changes

Erin DeRycke, Director, Data Analytics, 2-1-1 Orange County (211OC), Orange County United Way and Felicia Boehringer, CoC Administrator, Office of Care Coordination

Background

- The HMIS Policies and Procedures was approved by the CoC Board in August 2024, with the exception of the Client Record Request policy

- The CoC Board requested additional research be done to determine if the Client Record Request policy should be updated to allow clients to request their full record in HMIS

- Additional policies and forms are being updated to provide clarity, reflect new guidance, or reflect new internal processes

Process

- 211OC met with the HMIS Working Group in November to discuss revisions, and a user feedback period occurred from November 15th – December 1st

- Proposed changes to the Policies and Procedures were presented to the Lived Experience Advisory Committee on December 4th

- Progress on the revisions were presented to the Policies, Procedures, and Standards Committee on December 10th

- Client Record Request Survey feedback period: 1/14 – 1/31
  - 211OC released a survey to understand how agencies are currently handling record requests, if agencies have their own internal policies, and how many requests agencies are receiving

Working Group Feedback

- Concern around liability for agencies if case notes are released to clients

- More accessible data could improve client relationship

- Users would like more guidance around case notes data entry and how to talk to clients about their data; suggested limiting case notes in record requests to those entered after training was completed

- Sharing location data may be a safety concern if the client doesn't properly dispose of that information

- Full HMIS record may be too much information for clients
  - Allow clients to select what data they would like to see

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User Feedback

- Edit Client Consent Form to change "agencies contributing data to HMIS" to "agencies with access to HMIS"

- More guidance for agencies on how to process client record requests

LEAC Feedback

- Client Record Requests should include all data in the client's file

- The process to request records should be a single step, and streamlined to make the process easy for the client

- Case notes are a common request by clients; however, it is important to balance the potential impact to the system and service providers if case notes are provided.

- Clients need to be made aware that it's possible to request their HMIS record

- Service Providers need to be trained on how to help the client get the information they want

- Clients are interested in checking their Coordinated Entry System (CES) status.

See responses to LEAC feedback in Item 2. Attachment A

PPS Committee Feedback

- Train staff to assist clients with simple requests that don't require their full HMIS record

- Find out how agencies are currently handling record requests, and how many they are receiving

- Process should be client-focused

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Client Record Request Survey Feedback

- Most agencies are sending HMIS record requests to the HMIS team

- Some agencies provide clients with copies of their paper files if asked

- Agencies receive very few HMIS client record requests

- The client record request process should be as efficient as possible

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Client Record Request Considerations

- Pulling a client's full HMIS record is time-consuming for HMIS staff (2 hours or more per request)
  - If many requests are received at the same time, or records being requested are large, the team may need to limit hours that can be spent on these requests each month

- Since September 2020, all users have completed training on best practices for case notes data entry

- Agencies are not able to pull a client's complete HMIS record due to permission settings

- Legal Council suggested a review of each agency's liability insurance if case notes are being shared with clients

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Client Record Request Policy Changes since December Meeting

- Policy is no longer two steps for a client to request their complete record

- Requests can be submitted to an agency currently participating in HMIS, not just agencies the client has been served by

- Agencies can provide clients with information from their HMIS record without submitting a request to the HMIS Lead

- Case notes are released at the discretion of the agency that entered them

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Update: Client Record Requests

- Clients requesting specific information in their HMIS record may work directly with an agency participating in HMIS
  - Case notes may be shared by the agency that entered them at the agency's discretion
  - Agencies can only provide information that they have access to view in HMIS

- Clients that want to receive their full HMIS record may submit a record request by contacting a Service Provider currently participating in HMIS
  - Clients will be able to select the types of data they would like to review
  - Case notes are not included in the full record request submitted to the HMIS Lead

- Clients may request edits to data they contributed to HMIS
  - Clients that wish to edit data for a specific project must contact the agency directly to request the edit
  - If a project is closed or the agency administering the project is no longer participating in HMIS, no edits can be made.

- Data contributed by a participating agency (enrollment history, services, case notes, etc.) cannot be edited at a Client's request

Client Record Request Form

Client Record Requests DRAFT

This form must be submitted by an Agency Administrator at an agency currently participating in OC HMIS, and should only be used when a client wants to access data in their HMIS record the agency submitting the form doesn't have access to.

Prior to submitting this form, talk with the client to determine the specific data they want to receive. Review the Client Record Requests knowledge base article to determine whether the request can be fulfilled without submitting this form.

Clients do not need to provide a reason for wanting their HMIS record.

Agency Name

Agency Administrator Name

Agency Administrator Email Address

Agency Administrator Phone Number

Client's HMIS Unique ID

What data would the client like to see from their HMIS record? *

☐ Client Record Request Dashboard - Demographics, Release of Information, Enrollment History, and Uploaded Documents

☐ Client responses to assessments completed at entry, exit, or at anytime during their enrollment

☐ Data collected by a Service Provider regarding the client, including Services, Public Alerts, and Locations

☐ Coordinated Entry data, including status, history, and events

Only data entered in the HMIS record for the client ID above will be provided.

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Update: Data Use & Disclosure

- Clarify that data may be used or disclosed without client consent for system administration, technical support, program compliance, analytical use, and other purposes as outlined in the Privacy Notice or required by law

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Update: Data Release

- Clarify that client data will not be shared without consent except for uses and disclosures outlined in the Policies and Procedures or otherwise required by law

- The HMIS Lead, CoC Lead, and CES Administrators may release aggregate data about the CoC without organization or CoC Board permission

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Update: Data Integration

- Agencies must be approved for HMIS access before submitting any data integration requests

- Agencies requesting to integrate their own HMIS data with a case management software will be reviewed and approved by the HMIS Lead.

- Agencies requesting to integrate HMIS data from other agencies that they do not manage will be reviewed and approved by the CoC Board.

- Requests to integrate Coordinated Entry System data will be reviewed and approved by the HMIS Lead and the CES Lead

- Update language around new API process

- Data normalization tasks added

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Update: Client Consent

- Clarify that the client is consenting for their data to be shared with other service providers/organizations in HMIS

- Signing the consent form also means that the client's data may be included in data requests approved by the CoC Board

Update: Grievance Form

- Refer clients to OCC for grievances related to the Coordinated Entry System

- Provide examples of HMIS-related grievances

Update: Privacy Notice

- Clarifies that there are situations where client data may be disclosed without the client's consent

- Clients that submit a Client Record Request will have their full record sent to the agency that submitted the request on their behalf

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Next Steps

- Approval by PPS Committee *(pending LEAC approval)*

- Approval by CoC Board *(pending PPS approval)*

- Presentation of Policies and Procedures revisions at the HMIS User Meeting *(pending CoC Board approval)*

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Business Calendar – Item #2

Recommended Action

a. Approve the recommended revisions to the HMIS Policies and Procedures, inclusive of the Client Record Requests, Data Use and Disclosure, Data Integration, and Data Release policies, as well as updates to the Client Consent Form, Grievance Form, and Privacy Notice, as recommend by the Orange County HMIS Policies and Procedures Working Group, for review and approval by the Policies, Procedures and Standards Committee.

Thank you for joining!

Next Meeting: *Wednesday, May 7, 2025*
Location: *CAN Multipurpose Room 101,*
400 W. Civic Center Dr., Santa Ana, CA 92701