



## **HOMELESS SERVICES OVERSIGHT COUNCIL (HSOC) Data & Performance Committee Meeting Agenda**

March 16, 2026, 9:00 am

**Committee members must participate in person** (except for just cause reasons, or personal emergency reasons approved by the HSOC)

Room 356, County of San Luis Obispo Department of Social Services,  
3433 South Higuera St, San Luis Obispo, CA 93401

Members with approved just cause reasons and the public may participate by Zoom video call:

<https://us06web.zoom.us/j/87406489888?pwd=OhDCZC7RCjjSfBKHEKXrVtlu2Rypb7.1>

Or dial in:

+1 669 444 9171

Meeting ID: 874 0648 9888

Passcode: 045390

1. Call to Order and Introductions (2 minutes\*)
2. Public Comment (3 minutes\*)
3. Consent: Approval of Minutes (2 minutes\*)
4. Action/Information/Discussion
  - 4.1. Implementing Five-Year Plan Line of Effort 3 – Improve and Expand Data Management Efforts Through HMIS and Coordinated Entry System to Strengthen Data-Driven Operational Guidance and Strategic Oversight
    - 4.1.1. Homeless Management Information System (HMIS)
      - 4.1.1.1. Discussion Item: Unsheltered and Sheltered Point-in-Time Count Update (10 minutes\*)
      - 4.1.1.2. Discussion Item: Veteran Assessment in the Community (25 minutes\*)
      - 4.1.1.3. Discussion Item: Committee Planning for 2026 (\*45 minutes)
5. Future Discussion/Report Items (3 minutes\*)



6. Next Regular Meeting: April 20, 2026
7. Adjournment

The full agenda packet for this meeting is available on the SLO County HSOC web page:  
[https://www.slocounty.ca.gov/Departments/Social-Services/Homeless-Services/Homeless-Services-Oversight-Council-\(HSOC\).aspx](https://www.slocounty.ca.gov/Departments/Social-Services/Homeless-Services/Homeless-Services-Oversight-Council-(HSOC).aspx)

**HOMELESS SERVICES OVERSIGHT COUNCIL (HSOC)  
DATA & PERFORMANCE COMMITTEE MEETING MINUTES**

**Date**

February 17, 2026

**Time**

9:02 am-10:33 am

**Location**

Room 356, Department of Social Services, 3433 S. Higuera St., San Luis Obispo, CA 93401

**Members Present**

Devon McQuade  
Diana Howard  
Helene Finger  
Mark Frauenheim  
Mark Lamore  
Nathan Rubinoff  
Ranel Porter

**Members Absent**

Jessica Thomas

**Staff and Guests**

Derek Ferree  
Erica Jaramillo  
Jeff Al-Mashat  
Jonathan Quake  
Kari Howell  
Kate Bourne  
Laurel Weir  
Merlie Livermore

**1. Call to Order and Introductions**

Mark L. called the meeting to order at 9:02 am.

**2. Public Comment**

Ranel gave kudos to the PIT Count crew and shared that she learned a lot from the experience. Mark added that the PIT Count went very well, noting the maps were clear and very helpful.

**3. Consent: Approval of Minutes**

Helene moved to approve the minutes, and Ranel seconded the motion. The minutes were approved by voice vote.

**4. Action/Information/Discussion**

- 4.1. Implementing Five-Year Plan Line of Effort 3 – Improve and Expand Data Management Efforts Through HMIS and Coordinated Entry System to Strengthen Data-Driven Operational Guidance and Strategic Oversight**
  - 4.1.1. Homeless Management Information System (HMIS)**

#### **4.1.1.1. Information Item: 2026 Unsheltered Point-in-Time Count (Sheltered and Unsheltered) and Housing Inventory Count**

Kari provided a brief overview of the Housing Inventory Count (HIC) Sheltered Count and the Unsheltered Point-in-Time Count. She shared that on the morning of Tuesday, January 27, 2026, a total of 243 volunteers participated across 41 volunteer groups at seven logistics centers. Of these volunteers, 82 were homeless service providers, 11 were city representatives, and 13 were HSOC representatives. She added that the Data Team is now reviewing and cleaning the data, including de-duplicating observations, interviews, and sheltered data from the Homeless Management Information System (HMIS). The aggregate report to HUD is typically due in the spring, with the Community Report released afterward. Kari also shared participant feedback. Volunteers reported varying levels of comfort walking and surveying during night or early dusk hours. Experience levels among group leads varied, with some very experienced and others noting they could have used more guidance. Feedback also differed based on group size and composition, and some volunteers expressed disappointment about not finding more people experiencing homelessness (PEH). Despite this, 100% of respondents said they would participate again.

#### **4.1.1.2. Discussion Item: Federal System Performance Measures (SPM)**

Kate shared slides on the HUD submission of System Performance Measures (SPMs). She explained that the reporting period runs from October 1 to September 30, and that some measures require lookback dates. She also noted that SPM specifications and HUD Data Standards may change from year to year, and that only data from projects participating in the Continuum of Care (CoC) are included.

#### **4.1.1.3. Discussion Item: Committee Planning Process for 2026**

Laurel led the discussion, explaining that each HSOC Committee will help plan in alignment with the Five-Year Plan by focusing on the purpose and goals of each of the Committees.

From the discussion, the following goals were identified for the Data & Performance Committee:

- Reduce homelessness by increasing data driven by decision making through providing reliable key data through appropriate analysis that allows leaders to make decisions
- Provide key data through data analysis that allows leaders to make decisions
- Increasing service capacity by increasing and aligning data collecting and reporting processes
- Provide information that helps agencies understand and improve their services and create more service consistency and effectiveness
- Maintain and where possible, increase funding through system performance and stewarding compliance with HMIS requirements

During the discussion, Laurel also introduced a SWOT analysis exercise to help identify the committee's strengths, weaknesses, opportunities, and threats. The following points were identified by participants:

#### **Strengths:**

- Data is available
- Data quality is improving
- More agencies participating in HMIS—more complete data that gives a more accurate, valid understanding
- The presence of HMIS staff at the meeting
- Diversity of information and talent at the meeting to help ask questions and ensure we

understand the data

- Increased diversity of program types participating in HMIS
- HMIS has improved case manager understanding
- Group approaches things with curiosity—what else can we learn, not just here to meet the requirements
- Flexibility—can take actionable steps from this meeting, able to do a lot more
- Have Coordinated Entry staff present at meetings
- Data can influence funding decisions

**Weaknesses:**

- Certain key users are not present
- Do not control funding and communication about data
- Has not successfully used the vocabulary to effectively communicate data to the public
- Funding requirements make data and communication about data complicated
- Working under a complex system that cannot have control over

**Opportunities:**

- Has the potential to educate the community through data
- Opportunity to partner more with Cal Poly University through data analysis, supporting grant applications, supporting narratives
- AI (Artificial Intelligence)
- Lot of providers funded by CalAIM that have recently joined HMIS, increasing opportunities for integration
- Opportunities to leverage local investments, including private philanthropy, with effective data
- Additional partnerships could exist that could help disseminate data and increase education

**Threats:**

- Continuing reduction of federal funding, which impacts results
- State and local budget deficits, which could affect services and support
- Data standards can change under different leadership, making it difficult to compare data from year to year

**5. Future Discussion/Report Items**

No items were presented.

**6. Next Regular Meeting:** March 16, 2026

**7. Adjournment**

Mark L. adjourned the meeting at 10:33 am.

# SOFTWARE CHANGE REQUEST

## PURPOSE

A Veteran's List Status Assessment will be adding to the HMIS site for the following reasons:

1. **Service Triage**

A standardized Veteran List Status will assist with Built for Zero (BFZ) / By-Name List (BNL) service triage by clearly identifying where a Veteran is in the housing process. Knowing a client's current list status allows providers and case conferencing teams to more effectively prioritize outreach, coordinate services, and identify barriers to housing placement.

2. **Veteran Benchmark Reporting**

Capturing Veteran List Status directly through an assessment will streamline Veteran benchmark reporting by allowing for more direct, aggregate querying of key performance indicators (KPIs). Rather than inferring list status from enrollment patterns, housing move-in dates, and other indirect data points, this change will provide a single, reportable data element that improves accuracy, consistency, and timeliness of reporting.

3. **VA One Team BNL Initiative**

The VA One Team initiative to support a nationwide Veteran By-Name List requires Veteran List Status to be available as a reportable column per client. Implementing this assessment is therefore a functional requirement to support participation in the national BNL framework and ensure local data aligns with federal reporting expectations.

Person Making Request: Raymond Franco

Date of Request: 01/15/2026

Date Change Required: 02/15/2026

## PROJECT OUTLINE

This project will add a dedicated Veteran's List Status assessment to the site to explicitly collect and maintain Veteran List Status data.

Currently, Veteran list status is **derived indirectly** using a combination of HMIS enrollment data, project types, housing move-in dates, exits, and other related fields. While this approach allows list status to be calculated, it introduces several challenges:

- The logic is complex and difficult to consistently interpret across providers.
- Small data entry errors (e.g., missing or incorrect dates) can result in incorrect list status classifications.
- Reporting requires layered business rules that are difficult to validate and explain to stakeholders.
- Status changes that occur outside of formal program enrollments (e.g., disengagement, housing plan changes, VA coordination updates) are not easily captured.

The proposed change shifts Veteran List Status from a calculated outcome to a directly collected data element, allowing users to record known status changes as they occur. This will improve transparency, reduce reliance on inference, and better align HMIS data with real-world case management workflows.

## PROCEDURES

The following fields will need to be added to the site as part of the Veteran's List Status assessment:

- **List Status**
- **List Status Date** (the effective date of the current status)
- **List Status Change Date** (date the status was updated or became known)
- **Housing Plan Path**
- **Housing Plan Date**

Depending on the assessment design selected, multiple versions of the List Status field may be required to support tracking changes over time.

To determine the most effective and user-friendly approach, at least three assessment prototypes will be developed and evaluated:

### 1. **Simplified Assessment**

This version would include:

- Assessment creation date
- List Status
- Housing Plan
- End date

This approach results in a very simple and clean assessment structure. However, the primary limitation is that a new assessment needs to be completed – and an old assessment end-dated - each time a Veteran's list status changes once the user becomes aware of the update. While this supports historical tracking, it may increase data entry burden over time.

### 2. **Long Assessment**

This version would allow multiple list statuses and corresponding dates to be recorded within a single assessment.

The advantage of this approach is that it keeps all status history in one place. The drawback is that the assessment could become lengthy or confusing to maintain if a Veteran experiences numerous status changes, increasing the risk of user error or incomplete data.

### 3. **Client Profile Fields**

In this approach, List Status-related questions would be added directly to the client profile.

This is likely the simplest workflow for users, as they would only need to update the fields when they become aware of a status change. However, this method does not preserve historical changes, as each update would

overwrite the previous value. As a result, reporting on status changes over time would not be possible, limiting analytical and compliance use cases.

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## PRIVACY POLICY

All information collected through the Veteran's List Status assessment must comply with applicable as well as local Continuum of Care (CoC) HMIS privacy requirements.

At the local level, San Luis Obispo (SLO) County will need to review this VA data-sharing framework against its own HMIS Privacy Policy to ensure alignment with existing privacy notices, consent language, and allowable data uses. Based on this review, SLO County will determine whether a Memorandum of Understanding (MOU) or other formal data-sharing agreement with the VA is required prior to implementation.

## HISTORICAL CONTEXT

Historically, Veteran List Status has not been captured as a discrete data element within the system. Instead, it has been inferred through a combination of enrollment data, project types, housing move-in dates, and exit information. This approach emerged organically as communities began tracking Veteran progress toward housing outcomes using available HMIS data elements that were not originally designed to support By-Name List workflows.

As Veteran BNL processes matured - particularly through Built for Zero and VA-led initiatives- the limitations of calculated list status became increasingly apparent. Communities reported inconsistencies in list status counts, difficulty validating benchmark metrics, and challenges aligning local data with state and federal reporting expectations. Additionally, newer initiatives such as the VA One Team nationwide BNL require standardized, reportable Veteran list status data that cannot be reliably produced through indirect calculations alone.

This change request responds to those operational, reporting, and policy-driven needs by formalizing Veteran List Status as a first-class data element, improving data quality, usability, and alignment with national Veteran homelessness initiatives.





## RISKS

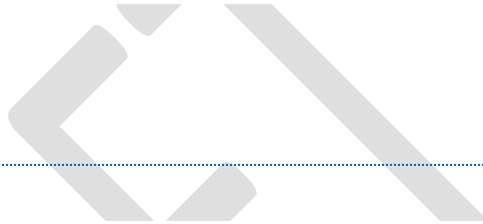
SLO County case conferences ~ 30 client records during BNL meetings. This new process would require the new list status to be updated on each client during or immediately after the meetings.

## ILLUSTRATION(S)

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### ILLUSTRATION OF SIMPLE ASSESSMENT

Assessment Date	__/__/____ 
Veteran List Status	Select 
Veteran List Status Date	__/__/____ 
Veteran Housing Plan	Select 
Veteran List Status End Date	__/__/____ 







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**ILLUSTRATION OF LONG ASSESSMENT**

Assessment Date	__/__/____ 
Veteran List Status	Select 
Veteran List Status Date	__/__/____ 
Veteran List Status 2	Select 
Veteran List Status Date 2	__/__/____ 
Veteran List Status 3	Select 
Veteran List Status Date 3	__/__/____ 
Veteran Housing Plan	Select 

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**ILLUSTRATION OF LIST STATUS QUESTIONS ON CLIENT PROFILE**

SSVF Eligible	Select	▼
VASH Eligible	Select	▼
Veteran Housing Plan Date Created	__/__/__	
Veteran PH Plan/ Track	Select	▼
Date of Death	__/__/__	
Veteran List Status	Select	▼
Veteran List Status Date	__/__/__	

## APPROVALS, IF REQUIRED

Kate Bourne

## COMPLETION OF REQUEST

Person Completing Request: Derek Ferree

Date of Request: 01/23/2026

# Veterans Consolidated Report Fields

San Luis Obispo HSOC Data and Performance 3.11.26

Veteran Homelessness Operational Outcomes & Standards Tool																version 0.65 (May 2025)								
By-Name List (BNL) Template																Column								
Facility			Most Recent Update			Sort		Veteran HMIS Client Identifier (if known)		BNL Management Point of Contact				Matches Reconciliation		Auto Calculated		Used in						
<input type="text"/>			11/4/2025			Reverse Sort		<input type="text"/>		Name: <input type="text"/> Email: <input type="text"/>														
Identifying Information									Status and Eligibility							Program Information								
Veteran Last Name	Veteran First Name	Full SSN	Veteran HMIS Client Identifier (if known)	Veterans HOMES Client Identifier (if known)	Continuum of Care (CoC)	Veteran Sex	Veteran DoB	Current Veteran Age	List Status	List Status Change Date	Date Veteran Identified as Homeless	Length of Time (LOT) Homeless Prior to Identification	Last Review/Update	Household Size	Veteran Status?	VHA HC Eligible? (includes general VA healthcare, HCHV, VJP)	Other VHA Homeless Program Eligibility? (includes SSVF, GPD, HUD-VASH)	Assigned Agency	Assigned Housing Navigation Staff	Assigned Case Manager	Date of Initial Program Entry	Date of Placement into ES/TH	Current Project Enrollment Type	Additional Service Referrals/Enrollments

Pathway to Permanent Housing (PH)																PH/Program Exit				Additional Veteran Information					Automatic Calculations					
Housing Pathway	Date Permanent Housing Plan Created	Permanent Housing Plan Notes	Expected Permanent Housing Date	Exit Destination - Permanent Housing	Date of Permanent Housing Placement	Exit Destination - Other (non-PH, non-literal homeless exits)	Date of Other Exit	Notes and Additional Information	County Location (if applicable for PHA)	Client Phone	Client Email	Last Known Client Location/Provider	Days Since Veteran Identified	Days from Unsheltered to Interim Housing	Days from Veteran Identification to Housing Plan Creation	Days Since Veteran Permanent Housing Plan Created	Days from Identification to Permanent Housing	Days Since Permanent Housing Placement												