

HMIS Recruitment Sample Scripts and Useful Information

Scheduling Email Template

Good morning/afternoon!

I hope this email finds you well.

I am reaching out as part of our Regional Committee's Homeless Management Information System (HMIS) recruitment workgroup. Using HMIS is a key way that we as providers serving people experiencing homelessness can collect information about who we serve and evaluate our effectiveness at ending homelessness. Our workgroup members are reaching out to agencies like yours, that does not yet participate in the HMIS, to have some conversation about the system and how it could help your agency and our region end homelessness for the people we serve.

If you're willing, I would like to schedule a call with you in the next couple of weeks to talk about HMIS, how it could benefit participants in your program, your agency's efforts to collect data to evaluate your programs, and report to people who support your operations. Here are a couple of times that work for me for a call:

XXX Date and Time

XXX Date and Time

Let me know which of these times will work for your schedule. I appreciate your willingness to have an initial conversation and look forward to our discussion together.

Sincerely,

XXX

Initial Recruitment Call or Meeting

Thank you for scheduling this time to talk with me about the Homeless Management Information System or HMIS.

First, let me start by asking you if you have heard of HMIS and how we use this in the NC Balance of State Continuum of Care?

[If yes] Tell me what you know about the system and is it something that your agency has ever considered using to collect and report data?

[If no] Let me tell you a little about HMIS and how we use it. The Homeless Management Information System or HMIS for short is an online system that homeless and housing service providers use to collect information about the people they serve. HMIS collects information about individual households such as identifying and demographic information (name, date of birth, race, ethnicity) as well as characteristics

that might be important for us to know to better serve people in our programs such as disabling conditions (mental illness, substance abuse, and chronic physical health issues), income, and mainstream benefits (food stamps, WIC, Social Security Disability, VA benefits, and others). HMIS also allows us to collect information about the services we provide and to house case management notes to create an electronic file for each person we serve.

HMIS is also the way our CoC makes referrals to the region's coordinated entry system that helps people experiencing homelessness connect to available permanent housing resources.

[Stop here to ask if they have any questions]

[Potential questions to ask]

- How does your agency collect data now?
- Does this system allow you to pull the reports you need to evaluate your programs?
- What challenges do you have with the system you currently use?
- What do you wish that you could do with your current system that you can't do?

Joining HMIS is free. The agency would request licenses for anyone they want to enter and/or manage data from the North Carolina Coalition to End Homelessness Data Center. NCCEH operates our HMIS and offers a Helpdesk to help people get started in the system and troubleshoot issues as they use the system. To join, prospective users take a series of trainings to understand the system, must pass a few simple quizzes based on those trainings, and complete a sample client profile. The agency and user sign usage agreements and the Data Center sets up your programs to begin data entry. It's a pretty simple, straightforward process to get started and your agency and users have support as they use the system.

[Stop here to ask if they have any questions]

I would love to hear what your thoughts are about the possibility of joining HMIS and what additional information you may need to decide to be part of this system.

[Gather information needed. If not a hard no, ask when you should follow-up with them to talk about next steps. If the steps require support from Data Center staff or Funding and Performance Subcommittee members, tell them you will reach out to get the information or find a time to schedule a follow-up conversation].

Thank you for taking the time to talk with me today. I will follow up with you by *[XXXX date]*. If you have any other questions in the meantime, please feel free to give me a call at *[XXX phone number]* or email me at *[XXX email address]*.

[The same or next day, send a follow-up email thanking them for their time and that you will follow-up with them by the agreed upon date].

The following lists benefits to clients, staff, and agencies by using the HMIS. Become familiar with these items to use throughout your conversation and in answer to questions asked. If you use HMIS, we encourage you to talk about your own experiences using the system and how it works in your agency and programs. Remember that peer-to-peer sharing is probably the best way to convince agencies to join HMIS.

Client benefits

- Connects clients through referrals to the coordinated entry system that prioritizes people experiencing homelessness for permanent housing resources
- Eliminates the need for clients to retell their story over and over to multiple staff and /or agencies
- Houses scanned documents so if important items get lost, clients still have access to copies
- Provides aggregate data reporting to state and federal government and other funders who make decisions about funding homeless and housing services/financial assistance

Staff benefits

- With Sharing Agreements in place, staff can access information from other agencies about services received to decrease duplication of services and understand the scope of the client's needs
- House case or progress notes for easy back-up and continuity of care
- Easily make referrals directly into the coordinated entry system, connecting clients to available permanent housing resources
- Decreases paperwork burden and allows easy access to aggregate reports
- Support from the NCCEH Data Center Helpdesk to assist with data entry challenges, corrections, and reporting issues

Agency benefits

- Access to the system is free and requires minimal training to begin data entry
- Produces trusted reporting to evaluate service delivery and report to private and public funding sources
- Support from the NCCEH Data Center Helpdesk to assist with data entry challenges, corrections, and reporting issues
- Required for many state and federal grants. Increases opportunities for funding.
- Reimbursements available from state and federal grants to pay for staff time for data entry and hardware needed to operate the system