



# Get the work done and feel good about it! – Project management strategies for effective and vibrant organizations

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**NHSDC SPRING 2022 CONFERENCE**  
MINNEAPOLIS, MN | MARCH 28-30, 2022

## Intros & Welcome



### **Amy Olsen-Highness**

- ICA Manager, System Administration (day job)
  - Joined as system administrator in 2017
  - Manager since 2018
- Mom of 1
- Learning how to do a handstand



### **Laura Birdsong**

- ICA Project Manager (day job)
  - Working with HMIS since 2010 as an end user  
→ system administrator → manager → project manager
- Mom of 2 (24/7 job)

## But first...some context

- Became MN statewide HMIS lead agency for in Fall 2016 – started with 2, now fully staffed at 27
- Over 220 participating agencies, 10 CoCs, 1 Tribal Collaborative and 10 state homeless programs
- High motivation to “prove our worth”
- Summer 2019 – pivotal moment – committed to getting to the root of our productivity challenges
- Lots of experimentation and learning since then, but we have taken some core lessons to heart
- And we haven’t figured it all out yet

## Core Challenges

1. I couldn't even tell you what I need to do today
2. EVERYTHING is URGENT and HIGH PRIORITY
3. Are we even making an impact? Would we know if we were?
4. Deadlines feel like a moving target
5. Your standards are sky high
6. Work is never done – it just goes on and on

## Challenge #1: I couldn't even tell you what I need to do today

### Solutions:

- Gain awareness of your Work in Progress (WIP) by first, simply, writing it down
  - Post-it note exercise using Kanban
  - Airtable
  - Break work into smaller components. You will be able to take on more smaller rocks than a boulder.
- Define your WIP by articulating the work clearly
  - Description/Context
  - Size of Task – XS, S, M, L, XL
  - Define when something is done (we'll come back to this)
  - Start Date and End Date (anticipated is fine!)
  - Status (Not Ready Yet, Up Next/Queue, In Progress, Complete, Terminated)
- Make visible and review regularly with manager or partners

## Kanban Board

Action Backlog	Do next	In progress	Done



612-346-2169

M5: 20 more being included (s.1)  
40 more " " (s.2)  
this is noticeably different!

M7: no harm if resubmit

Abby: One night ~~add~~ increase

**Changes**

M1: consistent (not surprising)

M2: large ↑ in client universe count  
↳ Δ in report?

M3: Small decreases  
↳ about 200 less comparing old to "new old" → resubmit? ~~maybe fixed!~~  
spike may not have been accurate

M4: A few more being captured  
↳ 25 more people pulling in

• expence form

Need: List of IDs you want taken out of report

List of clean IDs fully representing scope of scenarios  
↳ so remove extraneous  
AA ✓ w/ Drew  
→ 1 per unique ID!!

• schedule call w/ UGM re how is CES going? Many Gutierrez

• review scoring tool! → Amy Swathi Abby

• what happens next year when Cochran closes?

• SMC governing → post-reflections + recommendations

COPE  
SPM  
CES  
APR

Who's the schedule?

May 2018

*Handwritten notes on sticky notes:*  
- [Pink] ...  
- [Pink] ...  
- [Pink] ...  
- [Pink] ...

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**Back Burner (Uncertain Timef...)** 0 records

- 2022 SA (and RET?) Trainin...  
DUE DATE (OR ANTICIPATED)  
12/31/2021  
SIZE: M
- HMIS System Administrato...  
SIZE: L
- Community Services Rebra...  
SIZE: L
- CE Dashboard Data Literac...  
SIZE: M
- Exploration of the role of ...  
SIZE: S

**Upcoming** 5 records

- 2022 Priority Planning  
DUE DATE (OR ANTICIPATED)  
1/31/2022
- Visibility Project Proposal  
SIZE: XL
- Restructure Next Steps  
DUE DATE (OR ANTICIPATED)  
1/31/2022  
SIZE: M
- HMIS VSP comparable dat...  
DUE DATE (OR ANTICIPATED)  
7/8/2022  
SIZE: L
- CEDQ Phase 3 - Preparatio...

**In Progress** 10 records

- NHSDC 2022 Presentation ...  
DUE DATE (OR ANTICIPATED)  
3/31/2022  
SIZE: M
- Website Training Develop...  
DUE DATE (OR ANTICIPATED)  
3/31/2022  
SIZE: L
- 2022 PIT HIC Project  
DUE DATE (OR ANTICIPATED)  
5/31/2022  
SIZE: XL
- New Agency - Should we l...

**Recurring Tasks** 10 records

- General HR, Supervision, A...  
SIZE: S
- P&P Committee  
SIZE: M
- Staff Meeting Planning  
SIZE: S
- Toggl Maintenance  
SIZE: S
- Website Team/Workgroup  
SIZE: S
- Strategic Project Portfolio ...

**Done** 27 records



## Challenge #2: EVERYTHING is URGENT and HIGH PRIORITY

### Solutions:

- Document your work to allow an opportunity for you and/or your supervisor to prioritize
- Differentiate functional/core vs one-time or project-based work
- Classify tasks as either: fix, maintain, or improve
  - Boat metaphor
- Be mindful that a sense of urgency is a characteristic of white supremacy culture

## Challenge #3: Are we even making an impact? Would we know if we were?

### Solutions:

- Engage partners to articulate shared values and objectives (keep it simple!!)
  - Priority statements
- Show your work, define your own success
  - Quarterly project showcases (now 3x/year)
  - Annual meeting
  - Newsletter
- Reference existing documentation of expectations
  - MOUs, sys admin checklist, annual survey, job descriptions
- Experiment! Purposeful learning/observation mindset
  - A longer timeline is OK, get out of that sense of urgency

Priority Statement	Objective
Improves data quality (DQ)	Project supports and/or enhances the capacity of participating agencies in entering client data into HMIS that is accurate, complete, and entered in a timely fashion
Improves user experience (UX)	Project contributes to the ability of end users to fulfill their responsibilities around data input
Partners and users have resources to improve data literacy with HMIS data	Project enhances partners' capacity to interact with HMIS data, supplying them with tools to process and understand data
Advances anti-racist efforts / makes disparities visible	Project enables communities to identify disparities through HMIS data and/or seeks to eliminate bias/discriminatory impacts that may be embedded in a data collection or analysis process
Partners and users have HMIS data tools needed to interpret and act on their community's/agency's HMIS data	Project equips communities with the tools to fully interact with the data coming out of HMIS and utilize it for decision making
Fixes or maintains integrity of the system (system integrity)	Project contributes to the stability of the HMIS platform ( <u>Servicepoint</u> ), supporting Lead Agency's ability to carry out core tasks and "keep the lights on"



## Challenge #4: Deadlines feel like a moving target

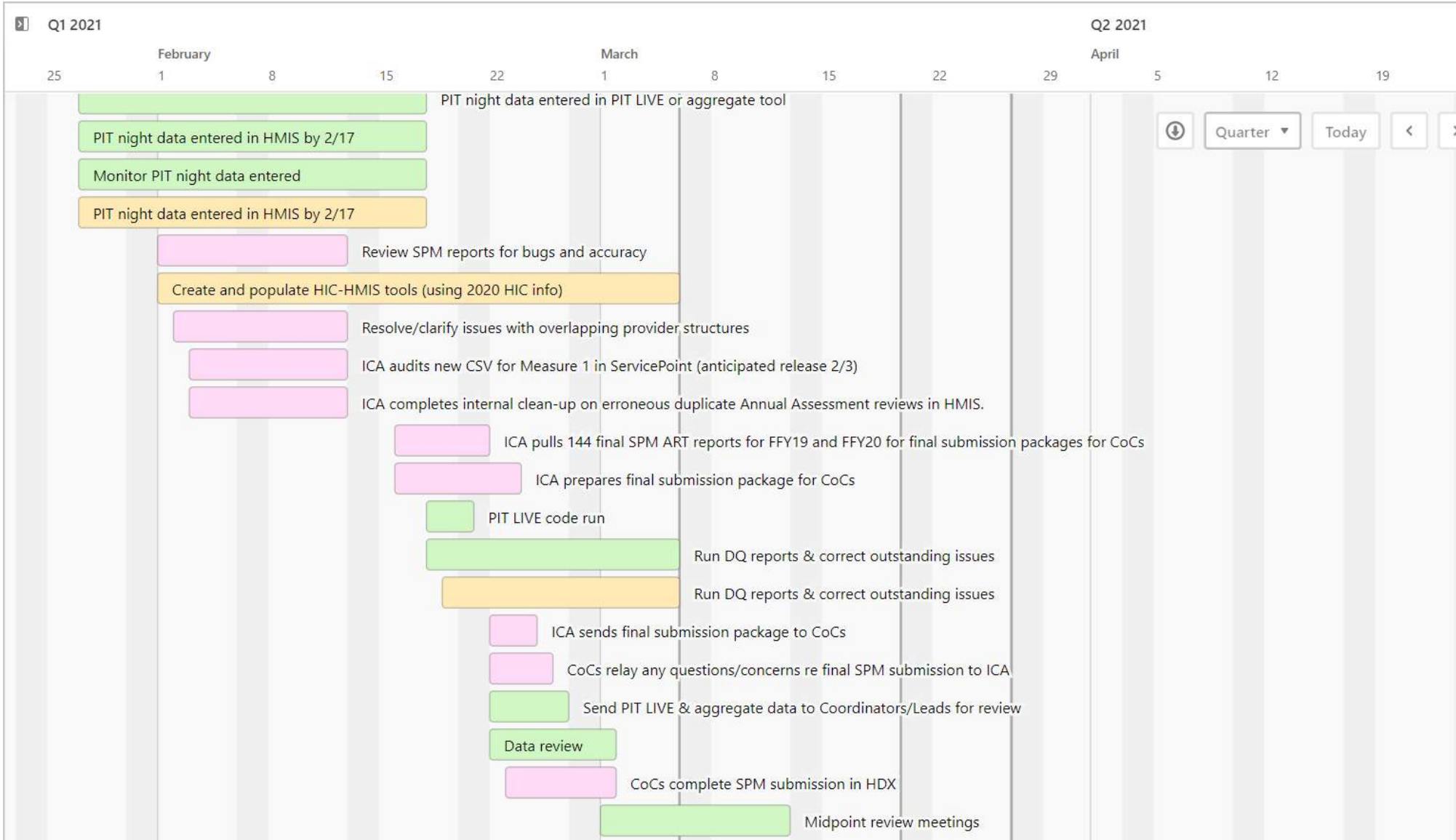
### Solutions:

- Enable the project team to expand and contract strategically
- Examine past experiences and lessons learned with re-occurring projects or partners – What can those tell you about how this project will likely go?
- Stay in close, regular communication with external partners
- Understand that an extension does not mean you have more work to do
- Don't hinge your work on external components
- Set milestones to ground your work that are not dependent on external factors
- Position yourself to be able to put things down well to be picked back up later





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## Challenge #5: Your own standards are sky high

### Solutions:

- Repeat over and over: “Better is better than best” – pursue progress, not perfection
- Create a Minimum Viable Product (MVP)
  - Recognize that you are likely missing out on value/utility AND learning if you don’t put something out a little earlier
- Leverage the rich opportunity for testing and feedback using “Beta versions”
- Set expectations for yourself or your team, for example, “I need a solid B from you on this, not your A+ work”

## Challenge #6: Work is never done – it just goes on and on

### Solutions:

- Define what it means for something to be complete
  - Finish the sentence: This [task or project] is done when \_\_\_\_\_.
  - Make clear when a task can be moved to “done”
- Verbs are useful in defining the action and clarifying expectations
- Plan the work in increments
  - Week-by-week
  - Milestones
- It’s okay if the plan changes, but make it clear what the changes are and how that will impact the remaining work
- Celebrate!
  - Consider a debrief for projects
  - Even a little note of appreciation and acknowledgement to a coworker can go a long way



## RSA WEEK BY WEEK TIMELINE

### WEEK 1: April 15-19

**THEME:** Stick to the basics with a couple flourishes – get your head around the data quality elements that impact the accuracy/validity of the measures. Identify “complex-light” DQ points that will be better to start addressing sooner than later. Pull reports. Set DQ strategy.

**OUT OF SCOPE:** A deep understanding of what each measure is/does/says, how it’s used, etc. The most beastly of complexities (ie really gross overlaps and HMI issues).

#### Activities:

- **Training Part 1:** Timeline and DQ Basics
- Pull SPM reports
  - Initial Glance spreadsheet (different tabs)
- Pull DQ reports
  - Fill in DQ tracker #1 input
- Determine DQ strategy for your region
- Communicate strategy to CoC Coordinator
  - Select a date for mid-point check-in week of May 6-10
- (If time) Start constructing DQ emails

#### Key Deliverables:

- DQ strategy w/ manager review – by Friday 4/19
- Email to CoC Coordinator with strategy outlined – by Friday 4/19
- DQ Tracker first round filled in
- DQ emails partially prepped
- Initial Glance spreadsheet
- Placeholder for “Not quite yet” DQ complicated cases

### WEEK 2: April 22-26

**THEME:** DQ emails out! Start learning about and processing the more complex DQ situations.

**OUT OF SCOPE:** Still not talking about “what the measures mean”.

#### Activities:

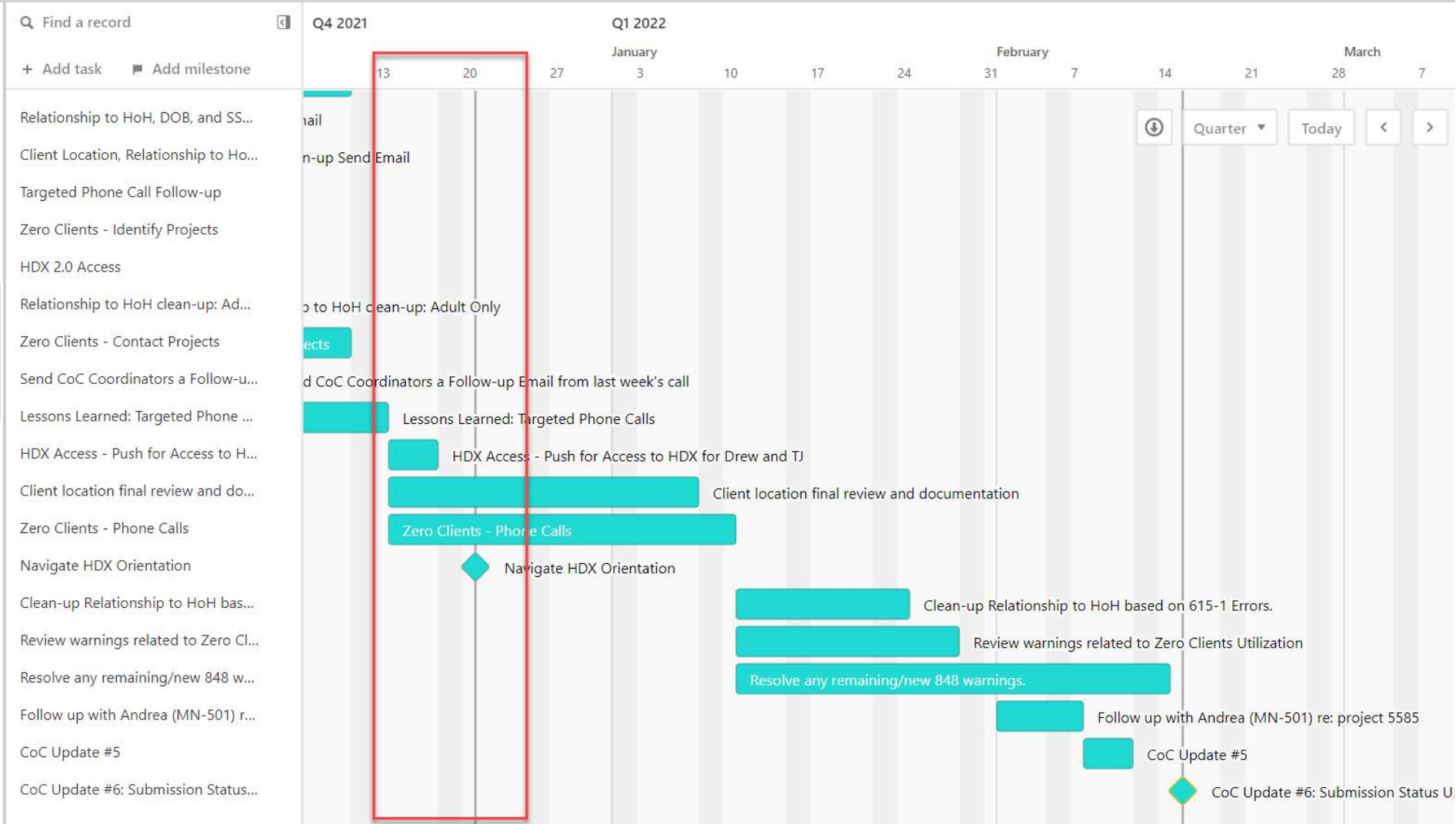
- All DQ emails prepped and sent
- DQ back and forth begins but probably still pretty light
- **Training Part 2:** DQ “It’s Complicated” – overlaps and HMI

#### Key Deliverables:

- Initial DQ emails to everyone



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## THIS SPRINT'S PROPOSED GOAL(S):

HIC	PIT	BOTH
<ol style="list-style-type: none"><li>1. Review HIC draft submissions</li><li>2. Deliver final HIC Tool to <u>CoCs</u></li></ol>	<ol style="list-style-type: none"><li>1. Deliver final summary PIT tables to <u>CoCs</u></li><li>2. Document PIT count swings from 2020 to 2021</li></ol>	<ol style="list-style-type: none"><li>1. Define and provide HDX submission support to <u>CoCs</u><ul style="list-style-type: none"><li>▪ Includes any internal training necessary to achieve this</li></ul></li><li>2. If needed – revise and release updated project timeline if HDX submission date changes</li></ol>





## Some catch phrases to remember –

- MVP (Minimum Viable Product)
- WIP (Works In Progress)
- Kanban
- Beta
- Priority Statements
- Work Breakdown Structure

## Some Platforms & Resources

- Airtable
- Jamboard
- Mural
- Mentimeter
- Toggl
- KanbanFlow
- Creately



Thank you!