



HMIS Project Management and Annual Calendar of Expectations

March 29, 2022

Melissa Mikel, ICF

Eric Gammons, TAC

Jill Robertson, Collaborative Solutions



Meet the Presenters: Jill Robertson

- Director Center for TA & Capacity Building - Collaborative Solutions
- Current work: Comparable Databases; Domestic Violence Housing & Technical Assistance Consortium (DVHTAC); Tribal TA; ESG-CV, CoC
- Previously - work for state government and oversaw all homeless service projects in state; HMIS Admin

Meet the Presenters: Eric Gammons

- Associate, Technical Assistance Collaborative
- Pronouns: He, Him, His
- Current areas of work: HMIS capacity building, vendor procurement, HMIS governance and management, Regional HUD TA Point of Contact, SRC Stimulus 1 Coach, SRC State Coach
- Previously: Over 30 years including CoC Manager/HMIS Lead/CoC, ESG, GPD provider/Disaster response

Meet the Presenters: Melissa Mikel

- She/her, Mexican-American
- Senior Homeless Services Specialist, ICF
- Current work: Region 5 HUD TA Point of Contact, SRC Stimulus 1 Coach, HMIS Capacity Building, Vendor Procurement, Racial Equity Initiative Coach, Equity Review Team, Stella P and Stella M work.
- Previously: HMIS System Admin and Co-Lead for local homeless initiatives.

Learning Objectives

- Distinguish project management from other kinds of management
- Identify HMIS Lead responsibilities as an annual task list (by category) including supporting VSPs and equity.
- Prioritize HMIS Lead responsibilities according to time of year
- Develop a more stable, predictable, and efficient HMIS Administration environment

Poll Question

Is your HMIS Lead team able to plan for data/reporting, monitoring, system administration, and other project management tasks?

1. Yes: we plan proactively by topic
2. Yes; we are able to but we don't do it very well
3. Sometimes; we are usually reactive to the CoC's needs but we have moments where we stop and plan
4. No; we aren't able to because our team is pulled in too many directions to stop and plan
5. No; how could we when the CoC doesn't communicate what our priorities should be

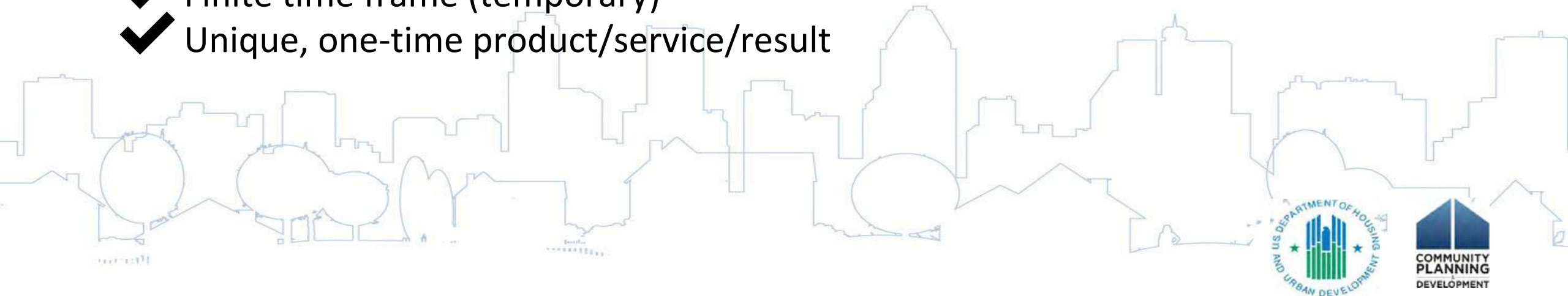
Project Management vs. Other Management

All *management* concerned with:

- ✓ Planning
- ✓ Executing
- ✓ Monitoring
- ✓ Controlling

Project management has two distinct features:

- ✓ Finite time frame (temporary)
- ✓ Unique, one-time product/service/result



Project Management for HMIS Leads

- Reporting deadlines become your “projects”
- Contract and monitoring dates, hiring deadlines, training events can all be “projects” as well
- Apply the principles of project management to each deadline
 - On time
 - On budget
 - Within scope
- Treat each project with care, specificity, and oversight
 - Define! Define! Define!
 - Who? What? When? Where? How? Why?

HMIS Lead “Rules of the Road”

1. Build Trust: keep an open door, be active in CoC meetings, schedule 1-on-1 time with agency staff
 - Example: hold a focus group with agency front-line staff and leadership when data quality standards are not being met to identify the problem and develop solutions
2. Incorporate diverse perspectives and community members. Stakeholder representation should include diversity across race, ethnicity, gender, ability, sexual orientation and other characteristics comparable to the community.
 - Example: [Include people with lived experience during data collection discussions](#)

HMIS Lead “Rules of the Road”

3. Attain Commitment: consistency in HMIS Committee meeting agendas, emphasize partnerships, set clear goals and objectives that are supported by realistic resources, tasks, and activities
 - Example: meeting agendas are provided no less than one week in advance with a diversity of topics and clear meeting outcomes and action steps
4. Maintain Transparency: Actions taken by the HMIS committee should be public to all coc members including VSPs.
 - Example: HMIS Committee meeting minutes are published on the CoC website. HMIS committee reports out activities during CoC membership meetings.

HMIS Lead “Rules of the Road”

5. Be Accountable: solicit feedback, hold internal team and external partners to clear standards, use meeting times to problem-solve
 - Example: use performance review opportunities regularly and consistently, for both internal HMIS Lead team members and external HMIS partner organizations
6. Focus on Results: use public scorecards to publish HMIS indicators,
 - Example: work with CoC leadership to ensure that HMIS and data priorities are accurately reflected in the CoC’s rating and ranking process (utilization, data quality standards, HMIS monitoring results)

Partnerships & Resources

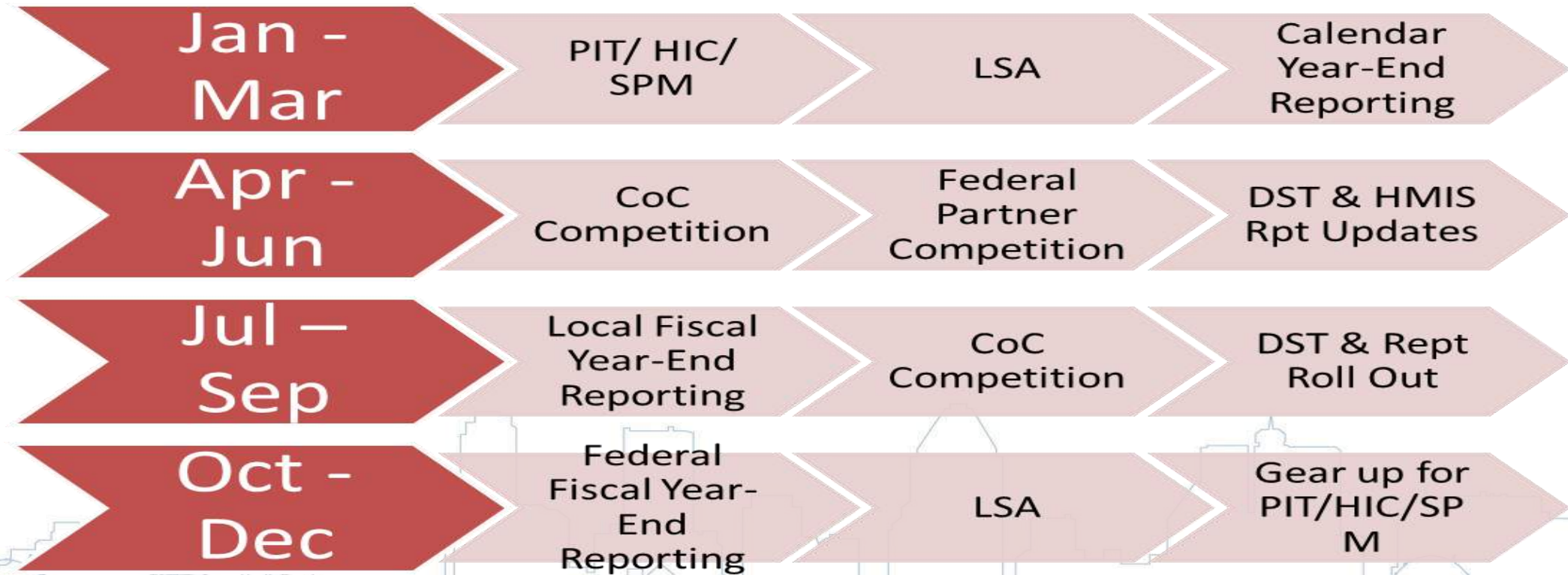
- HMIS Leads must manage partnerships with the CoC, participating agencies, and HMIS software vendors – plus the HMIS Lead team
- Your HMIS Team Resources are Crucial!
 - Delegate entire tasks to one team member, both responsibility & authority
 - Communicate expectations for results
 - Set up meaningful and regular feedback loops with staff

Poll Question

•What would provide the most benefit to your HMIS Lead team to help manage priorities and expectations?

1. Utilizing project management software
2. Increasing task delegation
3. More staff
4. Clearer expectations from the CoC
5. Dynamic staffing to respond to changes

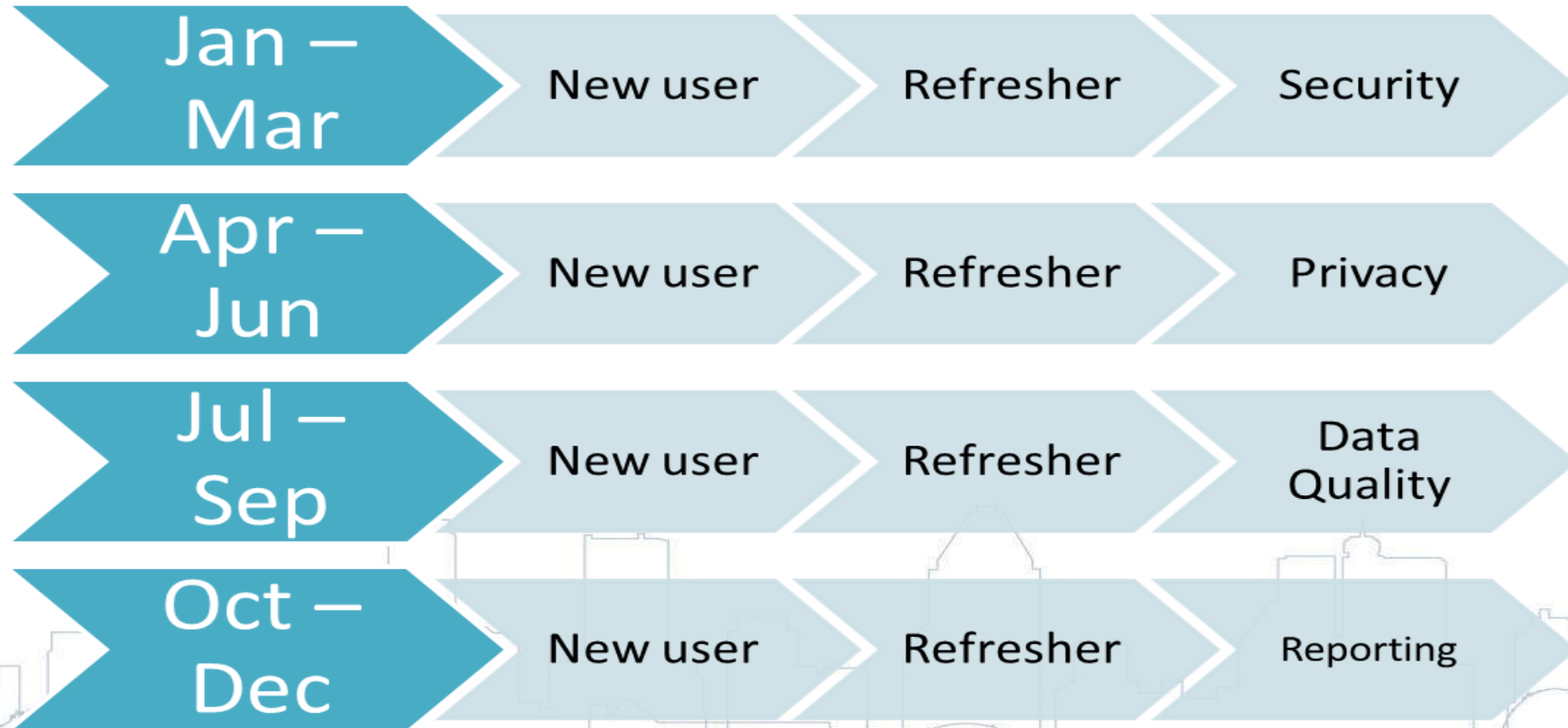
A Year in the Life: Reporting & Funding



A Year in the Life: Meetings



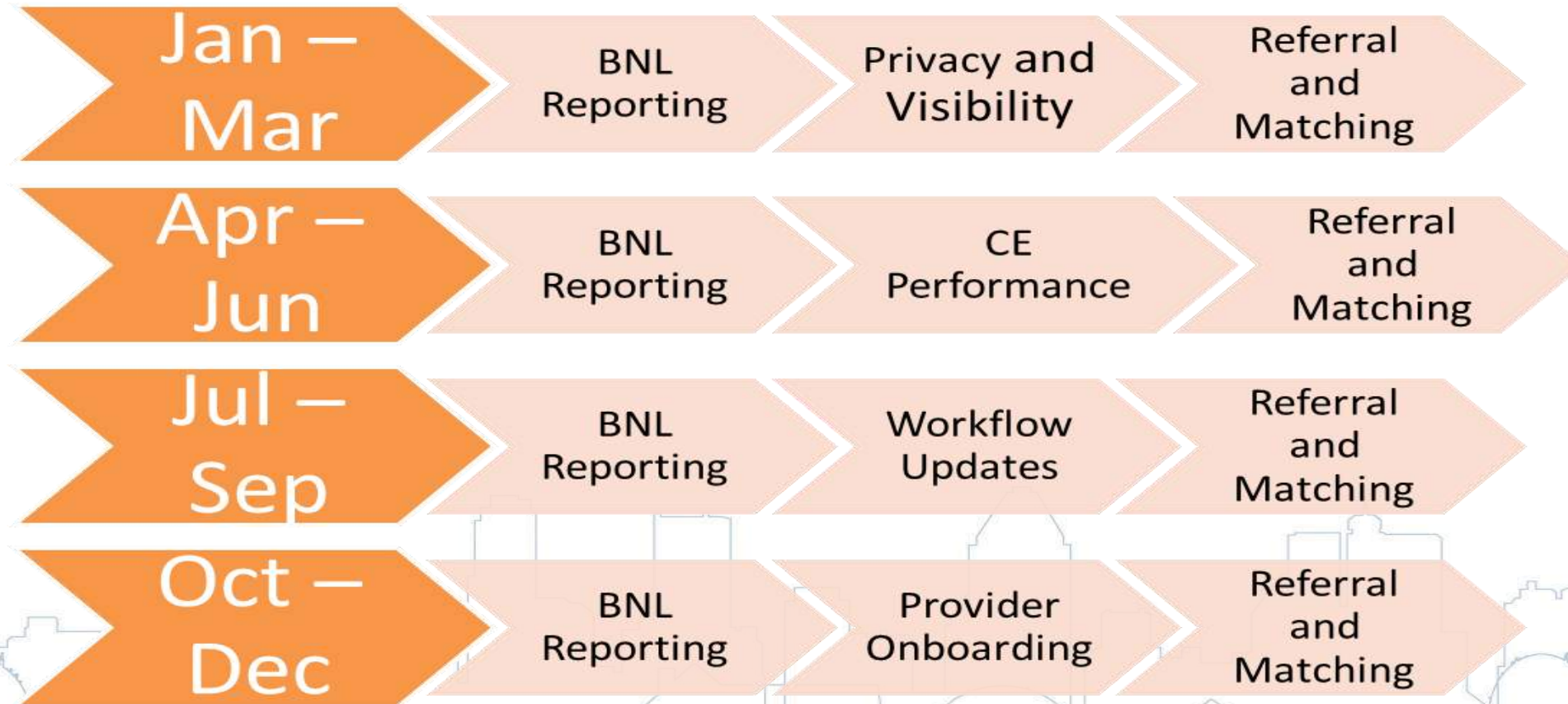
A Year in the Life: Trainings



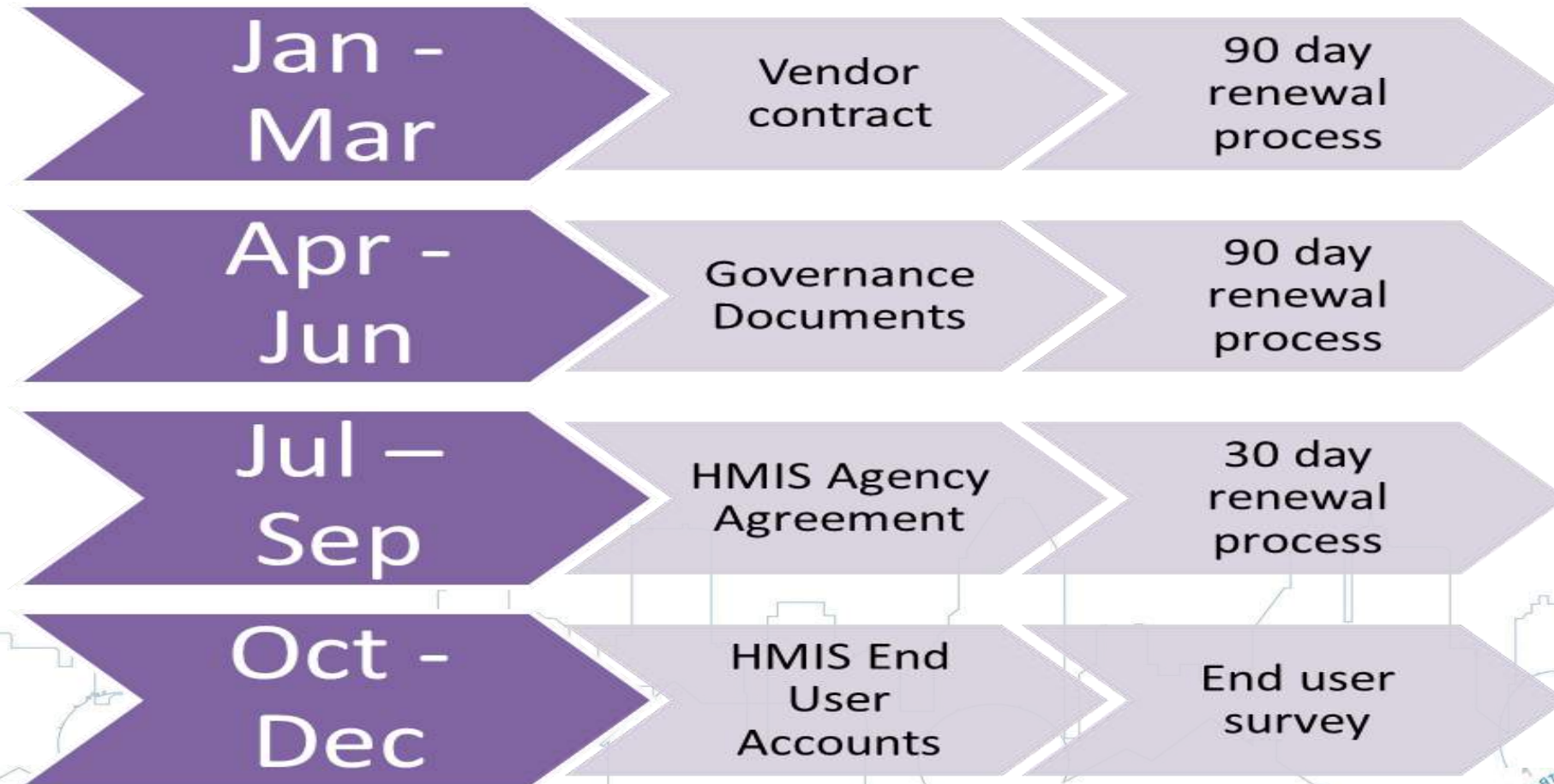
Investments in Training

- Initial investments in training pays dividends in time, resources, and data quality
- Use feedback loops (reports, surveys, score cards, and dashboards) to identify training needs and target high-value areas
- Fires are put out, freeing up your time for strategic work

A Year in the Life: Coordinated Entry Data Management



A Year in the Life: Contracts/Monitoring



SAMPLE: Year, Month, Calendar

Category	01/January	02/February	03/March	04/April	05/May
Meetings					
ESG Quarterly	ESG-CV Quarterly Report Due			ESG-CV Quarterly Report Due	
HUD Reports		SPM Submission Due		PIT / HIC Submission Due	
Monitoring		Schedule PEC Visits	PEC Monitoring Visits		
Trainings					
CE Data Management					
Local Reports					

SAMPLE: Year, Month, Day Calendar

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W
JAN	[Grey]					1 LSA Due	2	3	4	5	6	7	8	9	10	11	12	13
FEB	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
MAR	1 SPM Due	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
APR	[Grey]				1	2	3	4	5	6	7	8	9	10	11	12 NHSDC	13	14

Legend	
[Red]	Reporting
[Light Green]	Meetings
[Light Blue]	Trainings
[Orange]	Contracts/Monitoring
[Light Yellow]	Local Reports

SAMPLE: HMIS Task Calendar

Level	Task	Subtask	Start	End	%Done	Status	Category
1	SPM Submission		11/1/2019	2/28/2021	90%	Not Started	HUD System Reports
2		Think through submission process	2/28/2020	2/28/2020		Not Started	
3		Read updated SPM guidance on	2/28/2020	2/28/2020	100%	Done	
2		Length of Homelessness Outliers	2/28/2020	2/28/2020		Not Started	
3		Data Clean-up with Providers	2/28/2020	2/28/2020		Not Started	
2		Data Quality - review and finalize	2/28/2020	2/28/2020		Not Started	
2		Submit SPM to HDX	2/24/2020	2/28/2020	90%	Not Started	
1	SPM Dissemination		2/28/2020	3/30/2020	0%	Not Started	
2		Community Process Planning	3/1/2020	3/8/2020	0%	Not Started	
2		Where to Share	3/11/2020	3/15/2020	0%	Not Started	
2		What to Share	3/11/2020	3/15/2020	0%	Not Started	
2		Create visualizations and handout	3/15/2020	3/29/2020	0%	Not Started	
1	HIC Submission		11/21/2019	4/30/2020	30%	Not Started	HUD System Reports
2		Read HUD Exchange HIC information	12/1/2019	12/31/2019	100%	Not Started	

SAMPLE: HMIS Task Gantt Chart

HMIS Lead Tasks								Gantt Chart Template				
[Company Name]												
Project Start Date		1/1/2021 (Friday)			Display Week		1	Week 1				
Project Lead								28 Dec 2020				
								28	29	30	31	1
WBS	TASK	LEAD	START	END	DAYS	% DONE	WORK DAYS	M	T	W	T	F
1	SPM Submission											
.1	SPM Data Quality Review of Outliers	[Name]	Mon 1/29/18	Fri 2/02/18	5	100%	5					
.1	LOH Outliers Review for accuracy and DQ errors		Sun 2/04/18	Tue 2/06/18	3	50%	2					
.1	Exits Outliers Review for accuracy and DQ errors		Thu 2/08/18	Sun 2/11/18	4	0%	2					
.1	LOH Outliers Review for accuracy and DQ errors		Thu 2/01/18	Sun 2/04/18	4	75%	2					
.1	[Sub-Task]		Fri 2/02/18	Sat 2/03/18	2	50%	1					
.1	[Sub-Task]		Sun 2/04/18	Tue 2/06/18	3	50%	2					

Reminder About Reporting Deadlines

- HUD may change specific reporting deadlines based on changing priorities, new report implementation, data cleaning processes, or other variables.
- Having your year tasked out as shown will help you adjust when schedules change and/or deadlines are out of your control. For example, re-prioritize a later task to “fill in” the gaps in activities when a project gets delayed

Partnerships between CoC/HMIS Admin and VSPs

- Understand VAWA and VSP constraints
- Confidentiality and security of clients are of utmost importance
- Develop a plan together for monitoring of providers re their technology use
- Ask questions and offer support

Victim Service Providers

- VSPs that have comparable database should provide needed data to HMIS admin
- This calendar may be the same for VSPs.



Jan - March	PIT/HIC	Calendar Year End Reporting
April - June	CoC Competition	CD updates from vendors
July - Sept	Year-end reporting	Report <u>roll</u> out
Oct - December	Federal Fiscal year – end reporting	Gear up for next year

Victim Service Providers Resources

VSP Comparable Database and Reporting Requirements:

<https://files.hudexchange.info/resources/documents/COVID-19-Homeless-System-Response-VSP-Comparable-Database-and-Reporting-Requirements.pdf>

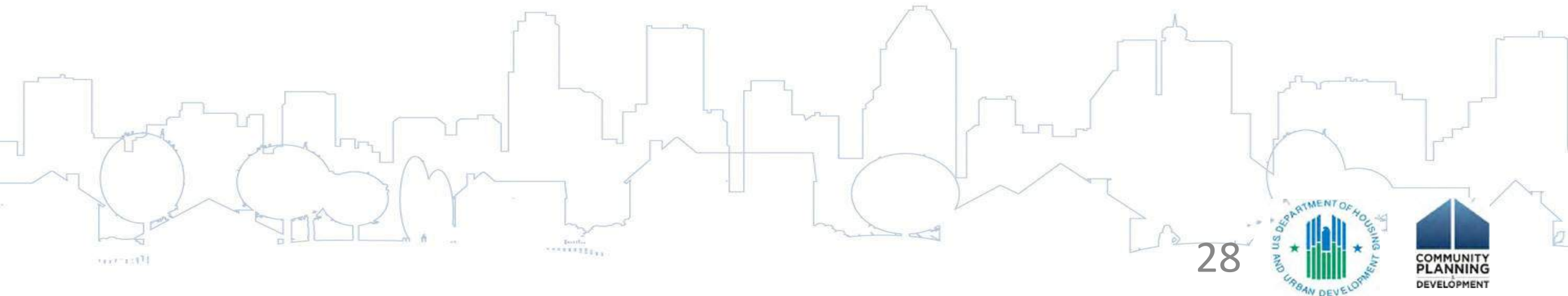
Comparable Database Manual: <https://www.hudexchange.info/resource/6305/hmis-comparable-database-manual/>

[Comparable Database: Vendor Checklist](#)

[CoC APR Guidebook](#)

Working with Equity

- This year Tribal Nations are eligible for ESG-CV & CoC funding
- How will you build capacity?



HUD Certificate of Completion

HUD is offering a certificate of completion for anyone who completes any four of the following six sessions at this NHSDC conference.

- HMIS Project Set-up 201
- HMIS Project Management and Annual Calendar of Expectations
- HMIS Governance 101
- Protecting Data in an HMIS Environment: Privacy, Security, and Confidentiality
- Implementing Effective Contract Negotiation and Relationship Management Strategies 201
- Data Quality 101: What is DQ?

Participants **must** complete the session evaluations for at least four sessions to receive their certificate.

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