

HMIS Budgeting Strategies

0:00:00 Mary: Yes, we'll get started in a minute.

[pause]

0:00:52 Mary: Seeing some familiar names on our attendee list. Very happy to have all of you here with us today. Sorry we can't see you too. We're gonna get started here... Maybe another... Give it another 30 seconds or so. I still see numbers jumping on the attendee count. Hopefully you know that you click into the HMIS budgeting strategy session. Our competitor at this time is HMIS project monitoring, which I'm pretty sure is part of the certification track, so we are not, but that is okay, we are very happy to have you here.

0:01:36 Mary: I think we'll get started. I'm happy to be presenting today with my friend Eric Gammons from TAC and David Lewis from the City of Spokane. David's joining us for some awesome community examples.

[pause]

0:03:08 Mary: Okay, we're back. It's back. We have no audio.

0:03:14 Eric: Alright.

0:03:16 Mary: Okay, we're back. See how effective the chatbox will be in communicating with us as we go forward for the next 60 minutes, so please let us know what you're thinking, what questions you have, we're gonna address content-related questions as we go if we can, we'll save a little bit of time at the end for Q&A. Anything you didn't get answered that you need answered from us can be entered as an HMIS AAQ at the end of this call. NHSDC will be sending evaluation forms after the webinar, so please rate us accurately, and please respond to those emails so that we can continue to improve our presentations to you.

0:04:00 Mary: We'll record this. Hear us say this over and over again, we will absolutely share these slides, we will share the recording, everything will go out via the HUD Exchange and NHSDC website for you to have all of the content that we're gonna walk through here. So I am gonna get started by telling you real quick what we hope to cover. Eric is gonna go first, he's gonna go through the budgeting and staffing basics. The tool kit, we'll talk about a little bit, basically how to get started developing HMIS budgets and all the things you should think about. So we hope you walk away with some knowledge there.

0:04:42 Mary: I'm gonna take it over and strategize a little bit from some other community examples that we have, some work that I've done locally, how to strategize for local state funding, writing legislation, lobbying, etcetera. We're gonna go through a little bit of that kind of budgeting and other ideas like grant writing, etcetera. And then we'll hand it over to David, and he's gonna talk a little bit about what they've done practically on the ground. I'm gonna use the word hustle over and over again. David and his team hustle every day for their HMIS funding, and he's gonna go over some of those local examples, and then we'll wrap it up. So Eric, take it away.

0:05:26 Eric: Hey. Good morning, good morning, welcome. Happy Cinco de Mayo and Taco Tuesday combined. Unbelievable. So, I just wanted to quickly cover... We have a lot of content, it's gonna be pretty dense, so we'll try to move as fast as possible. This was...

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0:05:47 Eric: Uh-oh. No sound.

0:05:52 Mary: Sounds like Eric, we lost you. I don't know if he can hear us. Well, this is getting off to a great start. [chuckle] Or is it you and I? Are we the only ones that people can't hear?

0:06:12 David: I think I can hear you, I can't hear him.

0:06:18 Mary: I know. Well. Good times. I know. Poor Eric. Eric are you on mute? Or you may have to call back in?

0:06:35 David: He's on a roll.

0:06:37 Mary: Okay. He is on a roll. Okay, this is interesting. I kinda wanna take over doing some of his content, but I think that would be a little odd. Hopefully he'll grab the... I'll look at the notes in a sec.

0:07:05 David: Has he advanced slides yet?

0:07:11 Mary: He is, he's just kind of going through his slides. Yeah, he is just going and going. Oh, looks like maybe he's come back.

0:07:26 David: Maybe wave your hands at him.

0:07:28 Mary: Hi, Eric. Eric. [laughter] That was a great idea, Veronica, thanks. Eric?

0:07:33 David: Yay! It worked, maybe.

0:07:42 Mary: Eric, we can't hear you. Shoot. I love that this is being recorded right now.

[laughter]

0:07:55 David: It'll make great Story.

0:08:00 Mary: Okay, I'm going to take our slides back to the characteristics of a strong HMIS lead and just start going and we'll see how Eric... Maybe Cherita or Garrett, you could reach out to Eric via...

0:08:17 Eric: Two workshops, two disconnections. That is a streak I don't want to continue.

0:08:23 Mary: Oh, so did it really disconnect on you? Shoot, okay. Well, we hear you know, my friend, do you want to start again? because basically, it went away the second you started talking.

0:08:34 Eric: That's outstanding. Just what I was looking for.

0:08:38 Mary: Yeah, I thought.

0:08:40 David: You get a fresh start.

0:08:44 Eric: I'm just going to start off on financial characteristics of a strong HMIS lead. I did look into GAAP accounting, it's Generally Accepted Accounting Principles, and this is what I found, that it's strong characteristics of an HMIS lead financial position is, of course, written accounting procedures, internal controls, revenue and expense procedures, asset management plan, and financial planning and reporting. And financial planning, of course, is budgeting, and that's what we're talking about today.

0:09:22 Eric: So, some of the guiding questions you can ask yourself, as HMIS lead, is what is the vision and the goal for HMIS in your community? When I say community, I mean the CoC, I mean the HMIS lead, and I mean the stakeholders in the community. So, everybody has to be involved when you start thinking about what the vision and goal is. Then you start thinking what activities does your HMIS lead need to accomplish to support that vision and goal? When should you budget for those activities? And I look at budgeting as being done, of course, right around your fiscal year, but it also could be around the CoC's year, or the federal funding year, or you could do budgeting four times a year. Assess your budget, see where you are. Maybe you want to do it monthly, it all depends on what time you have, but I think it should be at least semi-annually.

0:10:23 Eric: You want to look at how much do activities cost that you'll be performing as HMIS lead, and then of course where does the funding and resources that you're going to need to complete these activities come from? And I think Mary's going to talk a little bit of that a little later in this workshop.

0:10:47 Eric: So, budgeting. One of the things that I've seen from many HMIS leads is they base their budgeting entirely on their CoC funding. If you're doing that, we don't have a poll, but just raise your hand and point it at yourself and say you might be doing it wrong. You should be budgeting on what you want to accomplish, not what HUD's willing to give you. And if you need more money, it could come from the CoC, but it could come from somewhere else, but definitely don't base your budget for your HMIS lead on CoC funding.

0:11:34 Eric: So, I'm moving down fast because I lost five minutes with the microphone issue, sorry about that. So, let's take a look at some examples of operating costs if you're an HMIS lead and these come pretty much straight from the HUD's budgeting guidelines. Some of the things include staffing, office space, utilities, communication and Insurance, HMIS vendor, you kind of get the idea. We'll break these down a little bit further as we move on. Now, I will say there may be some other costs associated with your HMIS lead that are not included here, this is not an all-inclusive list. Just keep that in mind, this is just an example.

0:12:20 Eric: So, I like to look at cost associated with HMIS lead as a combination of two pots of cost. One is fixed costs, and those costs are harder to change, harder to adjust in the middle of the year. A lot of these costs are locked into annual contracts or multi-year contracts or it's just you can't change. Utilities. Normally, you'll only have one access to utilities, so you have to pay for whatever it is.

0:12:51 Eric: But then you have adjustable costs, and those are costs that you can make changes during the year and during a budgeting period. They include staffing, equipment, communications, travel, again, your HMIS vendor and you may be doing some third-party contracting, especially if you're addressing something that's immediate, but not long-term. So, your activities as an HMIS

lead, what you can accomplish, what you can perform, can be guided by some of these adjustable costs. So that's what we're going to look at right now, and here's the list of adjustable costs again.

0:13:40 Eric: So, let's look at staffing, that's a pretty easy idea. That's just your full-time equivalent positions that you're going to be having to direct HMIS lead activities. I've seen where CoCs will have some kind of measure their HMIS lead by the ratio of users to staff allocated. I don't think that's the ultimate answer. That's one way of measuring staff usage, but certainly not the only, because you can have different variations when it comes to staffing. If you're a large geographic size, then you may need a few more people placed here and there, you might have an extraordinary number of providers that requires more staff, or maybe just an overwhelming amount of data entry due to the amount of homeless folks you have. Oh, I already see a question about staff ratio, I knew that was coming.

0:14:48 Eric: And also, your HMIS lead, you might be providing HMIS activities to more than one CoC, so you have to take that in mind too. But staffing should always be focused on meeting your CoCs, if there's more than one HMIS visions and goals, always. Not just on spending HUD's money. So, some... I guess one equipment, or some examples of equipment would be computers and tablets, servers, networking equipment. You might look at investing into interactive whiteboards if you want to do more of what we've been doing the last six weeks, which has been talking head on web conferencing. You might also look at different video conferencing if you want to do trainings, especially if you're a large geographic area. Again, though, your equipment should be focused on your CoC's vision and goals for the HMIS. Oh, I did just want to make a note about equipment in particular. Equipment is guided by your financial policies, what you consider equipment or not, but it's also guided by the 24 CFR 576 and 578, and also by the OMB super-circular, the 2 CFR 200. So, keep in mind you can't call everything equipment just because you want to.

0:16:37 Eric: Again, communication, that's pretty easy. How are you going to communicate with your staff? How are you going to communicate with your users? How are you going to communicate with your CoC? And then travel is another one you can vary. Travel is one that a lot of people like to make cuts to, but sometimes you can lose the expertise if you're not attending trainings, attending conferences. There are different activities your particular staff utilize to improve and be much more adept in meeting the needs of the CoC's, HMIS goals.

0:17:16 Eric: There's HMIS vendor. There was actually a workshop yesterday talking about contracting done by Mary, heard it was awesome. And I highly recommend you watch that when it becomes available. Talking about the different contractual matters involved in HMIS, in dealing with your HMIS vendor. And of course, third-party contracting. Generally, this is done when you need to meet an immediate need of the CoC, and you're a little short on staffing, or you need some particular expertise your staff does not have available.

0:18:02 Eric: So we're going to move into... Okay, we kind of looked at the budget line items that you can make quick adjustments to, or at least make adjustments throughout the year to, a lot easier than some of the static line items. And so now we're going to look at how we can use data about our CoC and think about what adjustments we can make to those dynamic line items.

0:18:28 Mary: So again, this is some of the CoC-wide reporting. You can use APRs, LSA, the SPMs. That's way too many acronyms. Data quality reports and then your housing inventory count at that point in time. You may also want to look at the actual application, the CoC consolidated

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application itself, and you have an HMIS section to see how well your HMIS is performing.

0:19:05 Eric: So, we have a poll, and this is all I want you to think about. If you're going to use the data set assistant performance measures, and your CoC's vision goal is to reduce the length of time homeless, which of the HMIS activities would you adjust to improve the system of performance? And you can only pick one. So, go ahead and we'll give you a few seconds to make your choices.

[pause]

0:19:55 Eric: Alright, a couple more seconds. It's very interesting, I love these answers. So it looks like staffing is always going to be number one, for the most part, but then we have communications, which I thought is very clever, and third-party contracting, that can definitely come in handy in a spot especially when you need to close them. "Are we closed?" "Yes." Alright, thank you for that. We have another exercise similar to this. Our next question is... So, our CoC vision and goal is to increase bed utilization in HMIS, so that means beds for persons experiencing homelessness. You might have some shelters in your CoC who are not utilizing HMIS and so your data is going to be your housing inventory, that should say count, I don't know why it says start. And go ahead, here we go. You have your six-line items you can make adjustments to. Give you a few more seconds.

[pause]

0:21:13 Eric: Well, I really like this one. So, communications got the highest percentage, but also HMIS vendor. That's an interesting one for you, Mary? And staffing. So very good, thank you.

0:21:35 Mary: I voted.

[laughter]

0:21:38 Eric: Yeah, I think we're good on time. One more then. We're going to... So the vision and goal is to increase community utilization, so these may be folks, these may be organizations who work with persons experiencing homelessness but it's not their primary mission but, they would certainly benefit and certainly the folks experiencing homelessness would benefit from them using the system.

[pause]

0:22:12 Eric: A few more seconds. So, it looks like communications is leading, but HMIS vendor is number two. Did you vote that time, Mary? Alright, we'll go ahead and end the poll. Communications and HMIS vendor look like they're one and two on that one. Poor travel, it just didn't get there. Oh, and I do love to travel. So, thank you for participating in those, appreciate it.

0:22:52 Eric: So, the benefits of budgeting, based on HMIS, typically cost generally gives you a grand idea of how much does it really cost to run your HMIS and the needs of the CoC? Taking in mind that most CoCs in communities may want way more than you have available as far as resources, but at least you can explain to the stakeholders, to the HMIS manager, or to CoC managers, what your HMIS system actually cost and how you can make adjustments. And you're not talking about CoC grant money unless you determine that, why you need a significant amount of recurring money, and so maybe we need to touch the CoC grant, maybe we need to access the

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CoC grant money, or maybe there are some ESG available money. But for the most part, it will keep you from every time they ask something, you tell them, "Well, put a HMIS grant in for me if you want that done." You can say, "Hey, this is how much it costs to do this. We can look at other resources or we can access HUD funding."

0:24:19 Eric: Also, remember that HMIS is a marketable product. You certainly can utilize HMIS for some other organizations that may not be directly homeless-related but need a database to store their client data. And keep in mind that you can use the cost of your HMIS to determine what you're invoicing would be. I've seen so many invoicing... HMIS leads that were doing invoicing who invoice their projects based on nothing other than a number. "We're just going to charge everybody \$2000," with no indication of how they came up with that number.

0:25:11 Eric: So, we have one more where we're going to do a case study if we would've had this up in Minneapolis, but we have one more poll for you. So, the case study is, "Your vision goes at the local night-by-night, or a contributor, or a CHO for your HMIS database. The issues are your night-by-night shelter lacks technologies and is relying on volunteers to supplement limited staff." I think most of us have seen that situation or at least heard about it. "And that the same shelter currently uses HMIS, but it's sporadic, the timeliness is bad, the accuracy is poor. So, the idea is taking consideration of those same six-line items, which line item would you revise first?" We were going to have more than one, but I think it's just one on this.

[pause]

0:26:41 Eric: Couple more seconds. So, I really like the results here. I would say that equipment is a grand idea in this situation, especially if you can purchase scanners and have cards for the individuals entering the shelter, you might find that your accuracy improves, and your timeliness improves. Staffing would mean that you would have to allocate a staff to the shelter, that might prove more expensive than the value you get out of it, but that goes to each community. Certainly, third-party contracting would come in handy in this case. So those are all great answers and thank you for responding. And Mary, I think I'm right on time.

0:27:35 Mary: You are, Eric. Alright, okay. So what are some funding... Oh, I wanted to say we had a few questions you guys put in the chat, but the question was around staffing ratios when Eric brought them up, and that is one of the traditional ways that we mostly... I mean, going way back, would think about budgeting. Like thinking about numbers of users, number of programs, number of organizations you support versus how many SMEs you should have. We're definitely moving towards more of a role-based way to assess your projects, and I suggested and have tried to start doing a little bit of this data analysis myself, so I linked you guys to the spreadsheet where you could try it out too.

0:28:24 Mary: What if we tied our system performance measures against our staffing ratios and kind of found like cities or sisters cities or sister CoCs or whatever, that have the same general budget, as after the same general HMIS sites. Or maybe they're in the same AHAR category. You can gauge all of that from the system performance measures data that HUD publishes, ICoC. And just approaching, and kind of like Eric's case studies have walked us through so far, kind of thinking about your performance in terms of your budgeting and staffing ratios is one approach.

0:29:05 Mary: So, what are some other... What are some ways to cover increasing your resources?

So, it's basically what I'm going to focus on for the next couple of minutes. So, ideas for local HMIS spending and this is also something that we go over in the budgeting staffing toolkit that is being updated. The old staffing ratios were in from 2011 from the old toolkit. So, it is being worked on to be released soon. So, thinking about your HMIS spending you can look at cost-sharing ideas, you can look at deeper-service ideas, you can look at HMIS consolidations. HMIS consolidations is one of the things that HUD was pushing with the HMIS NOFA grants that went out two years ago.

0:29:52 Mary: And got 30 communities have the capacity building NOFA and a lot of those are not CoC mergers, which is a totally different situation, where CoCs come together and do everything at the CoC level together, that's not this. HUD's saying you could do some economies of scale and work on... If you're having short falls in certain budgeting areas, you may be served well by looking at close-by neighbors of yours or partnering up with other HMIS's, either around you or near you, and thinking about consolidation that way. So, it is one of the ideas that HUD would encourage you to explore.

0:30:39 Mary: Some other ideas for a state or government funding... I'm going to go into some of the logistics of what that means, too, in a second, but just to throw out some other ideas that we've seen. So, legislation. So local state funding. There are some states I used to work for, one that does local funding sources out of like state document recording fees. In Washington State it's on every real estate transaction. There's a fee that then helps pay for homeless assistance at the State level. Increasing budgets for state housing homeless authorities. Doing some advocacy at the local level, figuring out how to get homeless issues on the docket at the housing authority level, housing trust funds, etcetera. Housing Finance commissions, get the tax credits, right?

0:31:33 Mary: So, reaching out and partnering up in the same ways in which Housing Tax Credit... Finance commission tax credits can be partnered up in your implementation. ESG and CDBG grants are state grants and HMIS is an eligible cost, so that is also one option if you aren't already reaching out to ESG and CDBG partners in your community and figuring out how HMIS could be added to those budgets for some work. Locally, that is one approach.

0:32:09 Mary: So, what are those first three things? These are what we go deep into in the budgeting and staffing toolkit. When it comes out, you'll see some examples of cost sharing. And it's kind of hard to think about, practically speaking, what this means sometimes. But you could reach out to the IT department and maybe share an FPE with somebody who has broader IT responsibilities in your organization. But some part of their job would be focused on help desk for HMIS or project set up or something that you could easily train somebody, and it wasn't their full-time job. A shared resource with IT department. You could also do a search around locally for job descriptions that kind of mirror or match what it is you're looking to resource or add to your staffing capacity. And see if there are partner agencies in the community that might do that same kind of shared job. Share an FPE for certain tasks that could be kind of broadly shared across communities, organizations.

0:33:23 Mary: We've seen examples too where people are doing third-party contract work. So, they're thinking about a task that needs to be done. We know we aren't going to; we don't have the budget and maybe don't have the task for an FPE. So, we could though do a contract work or part-time kind of third-party staffing hire to cover some of these responsibilities. So, that's partnering up with another organization or another department or another community partner who is looking for some shared IT resources would be the way to approach kind of cost-sharing both different FPE

situations.

0:34:12 Mary: Okay, more cost-sharing examples. So single fixed fee per agency, for example, you can... I feel like this should have a different title. This is more like fee-structured... Just a second, I'm going back. Yeah, fee-structure. Okay, we're going to get into... I just want to keep track of my time. So, there's ways to split up your HMIS cost. You could do the more of the cost-sharing, can also be where you're splitting, you're thinking about your HMIS fees, that you have X amount of dollars you need to cover in fees, and you are more sharing that equally across your group of users or... So, these examples are like every agency no matter how many users or projects or whatever they have, every agency gets a set fee or maybe it's a fee-per-program. I think the majority of us probably have the fee-per-user-type situation.

0:35:11 Mary: Many times, the HMIS vendor contracts are driving this kind of split or designation of how you charge for HMIS. So, when you're looking at your budget and you're finding that things aren't adding up, or you're wanting to more address some performance issues that aren't being addressed right now, and figuring out staffing issues that way, this is one approach. You could go back to the drawing board and think about whether you want to do more of a cost share amongst your agencies and see if that gives you some ideas for ways to differently resource your HMIS lead work.

0:36:01 Mary: We talk here about a fixed fee with additional sliding scale fee. So, you see it could start small, charge people a minimum amount of some basic out-of-the-box services and then add on to the fees you charge depending on level of effort for things. So, breaking out. Again, this is all just to say that you don't have to take this straight fixed fee-per-user kind of user license cost that you may be getting from the vendor side. There are ways to adjust your split of HMIS amongst community members in a multitude of ways.

0:36:44 Mary: Fee-for-service is... And I'm so glad David's here and he's going to get to talk here, in just a second, because he has great examples of both the cost-sharing examples and the fee-per-service examples, and a little bit of what Eric touched on already on how HMIS can spread its wings and go beyond the strict homeless assistance, homeless service providers. But fee-for-service is like instead of a flat fee for everybody or coming up with that kind of fee structure that we talked about on the last slide, instead you would price out everything you do and only... Charge people accurate prices for the level of effort that those things require.

0:37:32 Mary: It's actually kind of... It is a, I would say, a good way to think about the services that you're providing and the services you're getting. As you put together your budget, there are things you're paying for that may deserve a little bit of a break out in terms of level of effort, you could look at your HMIS lead services this way too and figure out if there's a different way to strategize around your budget that involves charging more for the deep dive data analysis that's required once a year for the local report that takes a lot of time to do or build or maybe the housing inventory count, and point-in-time counts each year of this heavy, heavy lift that creates some burdens. So knowing your workflow, your ins and outs and what the level of effort is, you may be able to structure fees for services in a different way than just a flat-fee cost-sharing way that we talked about on the last slide. So, I'm going to say it again. This is just ideas for you to think about and go forth and re-visioning how you might be able to strategize around your budget and do some different things and cover things a little better.

0:38:54 Mary: So I talked about it already a little bit, but HMIS consolidation is, again, it's not a CoC merger, the CoC governance charters and CoC work isn't merging in any way, it's strictly the HMIS lead consolidates, HMIS vendor contract consolidates. There's a economies of scale that's gained from joining up with somebody else who's maybe using the same vendor as you or you guys you're sharing an HMIS lead right now and there's no reason to have two separate databases or whatever it is, you'll have to tackle data sharing, obviously, privacy, there's a lot of governance charter work in your CoC and HMIS policies and procedures, that you'll have to think through, but it is one of those things we're seeing happening and is benefiting a lot of the small and rural CoCs operating standalone HMIS implementations. That just it's a big cost to implement HMIS, in and by yourself. And so, if you're a rural community and can partner with a few others going through the same things, so HUD's seen some success there for folks.

0:40:11 Mary: Okay, I'm probably going to skip that, because I want to get to David, plus I already talked about doing a little hustle. There's that word again. Do some hustle at the legislative level. Think about your state housing advocates, housing authorities, and legislators and people that care about homeless issues and affordable housing in your community and see how you can get ideas for revenue generated at the local level. School districts are great at that. There's a levy every other election cycle. So, go talk to a superintendent and find out how they do levies to support schoolwork. Maybe you could come up with levies for your homeless housing assistance.

0:40:51 Mary: Private foundations are a good thing to research as well. I gave you a few links there, nothing is official or advocated for here, but just some ideas. There are a lot of private foundations actually that'll support the data analysis, knowledge building, how you use data to end homelessness or increase affordable housing or whatever the kind of issues are that we could potentially use HMIS data to help inform.

0:41:24 Mary: And so, you would do... You would start with a Google search that gets you to foundations that kind of have that realm of caring about this particular issue, and then see what grant opportunities might be there. And just some of my really, really outdated and old grant writing experience. What's in it for me? But really, what's in it for them? So, when you're writing grants and even talking to legislators and just thinking about your own advocacy for your population and money, you need to do the things you know need to be done. You really try and turn it around to, "Why does this benefit them?" Clearly, it's something you want, but what is in it for them? So, start from that perspective and, you know, coming up with partnerships, again, looking to community partners who were even tangentially doing some of this work, or IT-related, or data analysis-related.

0:42:24 Mary: There can be... I say here, with the right privacy agreements, you could be a research or analysis hub for your community and get into that kind of... There are a lot of, again, foundations and private funding sources that are interested in probably the exact data sets that you are managing right now, and so ways to figure out those partnerships might be beneficial and goes back to that fee-for-service idea. You can offer a service, and Eric said it before too, thinking about offering a service to create some revenue streams for you that you haven't explored yet.

0:43:09 Mary: Okay, I'm going to say hustle again, because David Lewis, and his team in Spokane are king and queen and whatever hustlers, all people, gender hustlers. So, David, take it away. I think we have about 10 minutes or so, 5 to 10 minutes. We'll want to stop about... In about 10 minutes, we want to make sure we answer any questions people have still.

0:43:32 David: Absolutely, thank you, Mary. And you guys can hear me, right? I figure I should check first. Alright, we're good.

0:43:38 Mary: Yes. [chuckle]

0:43:41 David: Alright, so I really appreciate the opportunity to speak. I've kind of divided this up into just two sections, and I want to start off by saying, in no way do we have everything figured out, and I know that we're all out there trying to hustle and do the best we can. For Spokane, what's worked, and sometimes we've learned the hard way, but ever moving forward, just talking about keeping the lights on. And for us, that started with looking at our, and I use this loosely, reliable funding that we were getting through the CoC program and also through the state. We have a rather large percentage of our funding in Washington that comes through, what we call, our Consolidated Homeless Grant. And those are the two largest funding sources that we have available to support our HMIS program. And then with those funding sources being more reliable, we did have some administrative challenges that we had to address first, particularly with the CoC program. At one point, we had 26 different CoC program awards that had had each HMIS line item in there, and we were giving a fairly solid chunk of money back every year just due to our accounting practices and how we were optimizing that.

0:45:02 David: So, one change that we were able to implement that really helped was moving to having an HMIS project and consolidating all the funding from those different awards under that project. And then likewise, working internally to control our internal costs with our accounting, we were able to find more money in our CHG award, the percentage that we were able to use for admin, so that we were able to better fund our HMIS program through controlling costs.

0:45:38 David: With those two funding sources, that does not get near to what we need. So, with that remaining portion, that delta there is where the hustle comes in. One way that we've tried to approach that is helping our covered homeless organizations have skin, and Mary touched on that, which is the idea of fee-for-license or fee-for-access, and that's how we've treated it. But we do so with the understanding that all costs and all fees have to follow two critical rules. It has to be transparent. The CoC needs to understand what the costs are. And it needs to be informed through the CoC HMIS committee. And it cannot impede structural priorities of the CoC.

0:46:29 David: And the reason I say that is because the cost models that are available for charging, for example, with a license cost is... There's pros and cons to both. With a fixed fee-per-license, it's easier to manage, but you can run into issues with not being able to issue enough licenses. With what we call a concurrent licensing model, which is you can have as many people logged in up to a certain capacity, you run into consumption issues with a handful of users taking up more time and system resources, and that is something that has to be considered as well.

0:47:10 David: We've moved to a concurrent licensing model, and we apply a small monthly fee to our largest, best-funded organizations in our continuum, while making strategic allowances for some of our smaller providers that add value to the CoC. So, in some cases, if I have a small shelter that only has a couple of staff, they are run largely by private donations, but they have emergency shelter beds to add, we make accommodations for that. Another... Outside of the fee-per-license approach that we've taken, we also look to collaborate. So, by that, we, nationally, locally, we look to find other CoCs that're using the same HMIS software that we're using, that have aligned interests. There are, for example, some of our national partners that we've worked with heavily

customize their environments. We can swap queries; we can swap forms. That saves with overhead in a big way and has been a great way for us to add new features to our system without greatly increasing the cost.

0:48:23 David: We do like to... And it is, it's sales. We do hustle fairly frequently with private philanthropic organizations, banks, utilities. I'm talking with our local utility provider to solicit funding and really, the argument's always the same. And I appreciated the way that Mary and Eric really framed this, which is you do have to show them what's in it for them. And that can take two forms, depending on who you're making the pitch to. With a utility provider, or even a medical provider, you can make the argument that this helps their bottom line. This helps them because we're all serving the same people. For a utility provider, disconnected service costs money. For a hospital, ER room visits costs money. Consolidation of information and the powerful way that an HMIS can facilitate communications across the community, gives you an almost endless range of selling points on that basis.

0:49:30 David: One of the last things I like to touch on when talking about keeping the lights on is use your HMIS committee. Our committee provides, like "Hey, saw this grant award, you want to give it a shot?" They're all writing grants. Non-profits live off grants so you should have skilled, talented people that are willing to pitch in to keep the lights on, because this is something that benefits all of us.

0:50:00 David: So, I'm just going to advance. So beyond just keeping the lights on, we want to talk about, "Well, how can you do more with your HMIS?" And I put that as an HMIS or CMIS because Spokane's in that process right now. We've moved beyond and I hesitate to use the word, traditional, because I feel that we probably always should have been there because we're all... Communities have social safety nets of what we would call traditional homeless projects but also nontraditional justice service providers, medical providers, who are all addressing the care needs of the person, the whole person.

0:50:38 David: And especially in an age where we're talking about the social determinants of health, it stands to reason that we need to start looking for data sources that go beyond what we've become comfortable with. To that end, what Spokane's moving towards is what we call a community management information system, because we are wanting to reflect and rebrand to take account of all the different sources of data, who under the shared strategy of improving care, improving access to care, and improving outcomes. And that's something that every community would value, and every community would care about.

0:51:15 David: A couple of examples of projects that have both added funding and capacity, but have also more importantly, resulted in better outcomes and care for those we're serving is... I have the zone project here, which was really a great way for us to partner with our Regional Health District and with our neighborhood associations to do more of a focused case management model that uses a two-generational approach. So, it's the whole family being engaged in goal planning, self-assessments. And this was really a targeted effort to better develop the tools that we had in our HMIS that were focused on client goal planning, and client self-directed goal planning. Because our vendor had some tools that were there, but they just didn't meet our needs. We didn't necessarily have the skillsets internally to develop some of the questions, so we partnered and we were able to do that, and now we have a suite of new tools that all our other agencies are able to use that participate in our systems. So that was a great example of, on a shoestring budget, expanding the

capacity and capability of our system.

0:52:37 David: Similarly, we're working on dynamic 100% HMIS based by-name list. This is something that every community needs to have. There are multiple initiatives, there's Built for Zero, there's A Way Home Washington. We secured funding to specifically target the development of that list. We used a third-party vendor in partnership with my HMIS team, so that we didn't... We weren't able to add an FTE, but we were able to secure enough funding to push this initiative. And then once this is launched, my team will support it. But it's a way of still moving forward even if you don't have the immediate resources to add staff to do it in-house. The list is dynamic, and it updates based on data entered from the 30-plus different providers we have in our community. And more importantly, the lessons learned through the development of these lists are giving us opportunities that we didn't have before. We're going to be able to develop offshoots of these tools to address other sub-population groups and other priorities in our CoC.

0:53:46 David: And finally, looking at medical providers. This is really the future in a lot of the communities, especially as Medicaid costs become something that's billable and more covered homeless organizations are looking at that as a way of providing services and securing funding, but we have clinics that participate. We're using our HMIS to help manage our Hepatitis A response and COVID. A lot of communities are doing that. But the range of benefits from having medical providers participate is really quite limitless. And for those that have been around a while, if you were to look back at the 2004 Federal Registry, which set forth the security rule, that all HMIS's are required to operate under, it was done so based off of HIPAA requirements. So, you should, regardless of your solution provider, you have a tiered security architecture based HMIS that can accommodate the needs of organizations, whether they are operating under HIPAA, FERPA, 42 CFR Part 2. We've dealt with those. And I think it's really just about having the passion and not shying away from conflict that comes up with trying to advocate. So, these are just several areas that we have looked to, to expand both the toolset that we have available, the participation, and making it more about client outcomes, which I think drives performance. And that's what I have.

0:55:23 Mary: David, thank you so much. I'm trying to prompt folks to type in any questions they might have. Then I stopped listening because I realized my grammar was wrong, I think, on "Eric, or me." "For David, or Eric, or me." Any questions?

0:55:52 Mary: David, Eric, thank you so much for your presentations. I appreciate your time.

0:55:55 David: Thank you.

0:55:56 Eric: Yeah, we enjoyed it.

0:55:58 Mary: We'll just stay here for just a little bit longer. Glad your audio got fixed, Eric. It's good to hear you. Handle federal partners. So, Jeanette's asking, "How do you handle federal partners?" And maybe she's talking in the context of fees you might charge, David, federal partners who are requiring you. So that's usually the way it goes. The federal partners ride past the SSCF and HIPAA that require HMIS participation of their grantees will usually have a line item in those grants for their grantees to be able to send some money to the HMIS lead, so you would set up partnership agreements.

0:56:45 Mary: You're doing that already and establishing usernames and passwords. That's all part

of the 2004 spec, so putting money, exchanging hands, kind of relationship within those partnership agreements to be able to get some of the fees that the federal partners do allow for HMIS fees and participation locally. The caveat would be you need to make sure it was going for just... The money is supporting those grantees to use HMIS for their data and their reporting. It's not a larger admin usually pot of money. And specifically, in the CoC and ESG grants too, specifically to support the use of those.

0:57:28 Mary: David, anything to add there? Or Eric?

0:57:32 David: I was just going to say that depending on the federal source. Those have been the easiest in Spokane for us to attach a fee schedule to, but you may run into situations where some fee models might not work based on the accounting practices. So, a flat fee paid upfront at the start of a year, at the start of a grant cycle, might not be allowable. They might have to do a pay as they go. It just depends. It's just something that you need to be aware of if you're going to follow that. It can be a bit like herding cats, but federal partners tend to be the easiest to deal with, as far as attaching a fee.

0:58:09 Mary: Yeah, we should have said that up front. If you're aren't already charging federal partners for use of... For their grantees' use of HMIS in reporting mechanisms, that should definitely be a part of your budget.

0:58:25 Mary: Mary Anne, "So, we specify we want to use a grant in certain ways in our COC project application, but only have HMIS in our scope of work, can we pivot how we use our funds mid-grant cycle without connecting with HUD?" I mean, probably not. Your scope... I mean it really depends on that contract, Mary Anne, what your scope of work says is what HUD's going to care about. So, if you're going 10% shifts that's one of the roles or if you're doing completely different lists of activities than what's in the scope of work then that what's required reaching out to your field office to modify.

0:59:07 Mary: Jeanette, I think we're going back to the federal partner discussion, we found them to push back especially SSCF. That's surprising to me, having worked on the SSCF project. I think that you could probably reach out to a couple of different places for help with that. And I would start with the regional coordinator for the SSCF grants. If you don't have that, you can email one of us and we'll put you in touch with the right... Eric does SSCF work as well. So, either Eric or I and our contact info's at the end of the slide. I'll go to that real fast.

0:59:42 Mary: Oh cool, lots of questions. I'm going to scroll through the slide. Oh, we... In this slide deck, we gave you some regulations. And I also wanted to say, pay attention to the mega-waiver that just came out for the CARES Act, because one of the mega-waiver things, if you didn't know already, is that the ESG funding can go to an HMIS lead directly and it couldn't before. Or doesn't... Sorry no, that's wrong. It doesn't have to go... Oh now I'm getting all mixed up.

1:00:08 Mary: Go read the CARES Act. because there's some HMIS opportunity there in the mega-waiver. We put a bunch of useful tools and products for you... There's Mary and Eric. Email us if you want some more SSCF specific information about regional coordinators, because you shouldn't be getting pushed back on SSCF fees for HMIS. So that's pretty clearly delineated. And the VA guidance. And then Lucius says, "Is there a way to determine which vendors CoCs are using, in order to partner and work together on vendor projects?" Great question!