# HMIS Project Management and Annual Calendar of Expectations

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# Learning Objectives

Learn how to:

- Distinguish project management from other kinds of management
- Identify HMIS Lead responsibilities as an annual task list (by category)
- Prioritize HMIS Lead responsibilities according to time of year
- Develop a more stable, predictable, and efficient HMIS Administration environment
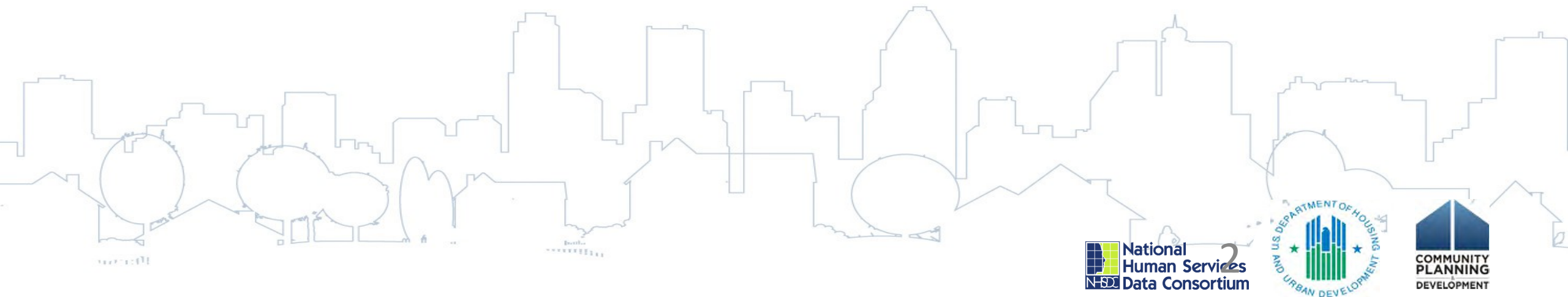
# Poll Question #1

- 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 have dedicated staff by topic
3. Sometimes; we are usually reactive to the CoC's needs
4. No; our team is pulled in too many directions to stop and plan
5. No; 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 buget
  - ➢ Within scope
- Treat each project with care, specificity, and oversight
  - ➢ Define! Define! Define!
  - ➢ Who? What? When? Where? How? Why?
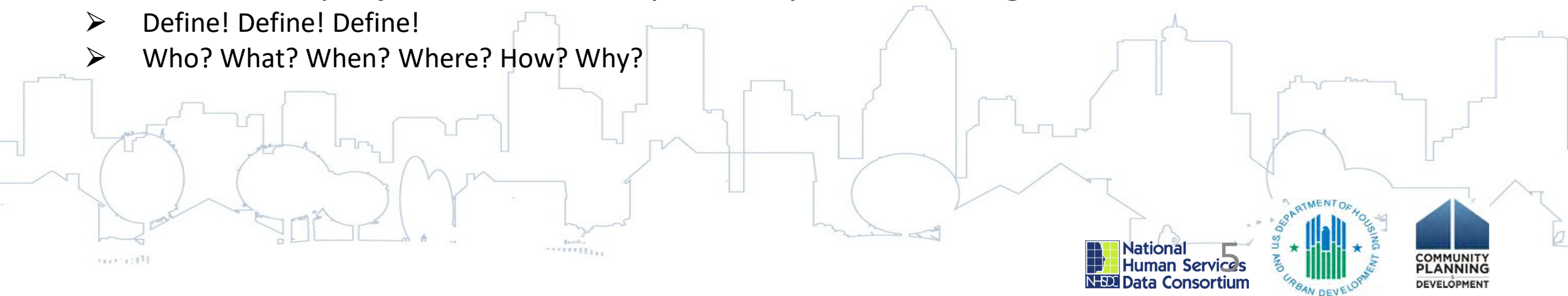
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# Project Management: Rules of the Road

- HMIS Lead teams are project managers for their CoC and participating agencies
  - 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
  - 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

# Project Management: Rules of the Road

- HMIS Lead teams are project managers for their CoC and participating agencies
  - Be accountable: solicit feedback, hold internal team and external partners to clear standards, use positive peer pressure, 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
  - 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)

# Project Management: Rules of the Road

- HMIS Leads must manage partnerships with the CoC, participating agencies, and HMIS software vendors – plus the HMIS Lead team
- Delegation is crucial!
  - Delegate entire tasks to one team member
  - Communicate expectations for results
  - Delegate both responsibility and authority
  - Set up meaningful and regular feedback loops
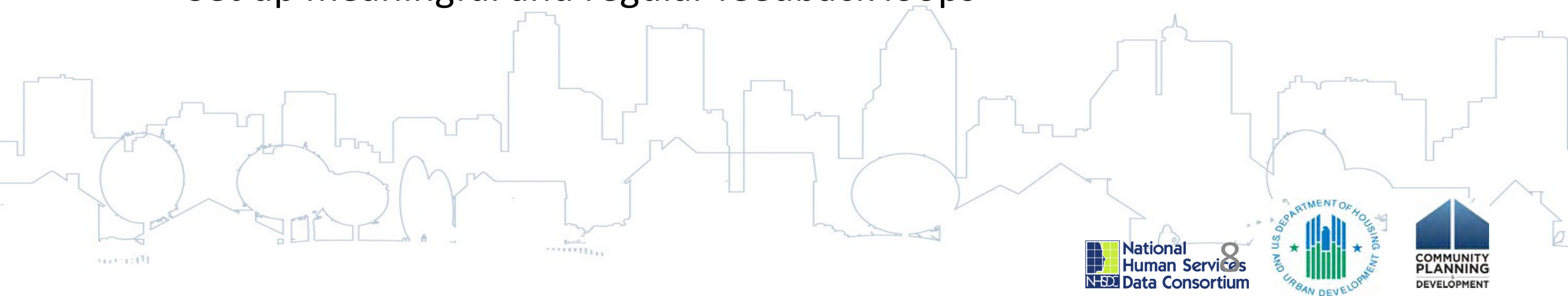
# Poll Question #2

- 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

# Group Chat

- In the Chat Box, share with your colleagues some helpful management practices, software tools, and CoC – HMIS Lead policies or processes that you've incorporated into your HMIS Lead team to manage tight deadlines, multiple projects, and competing priorities.

- Also consider how locally-defined CE or COVID-19 data elements are defined and implemented in HMIS
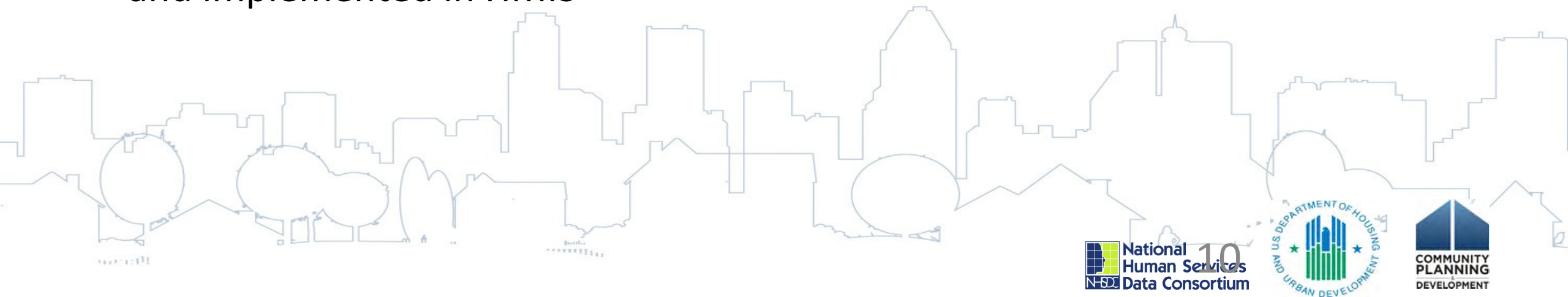
# A Year in the Life: Reporting & Funding

| Jan - Mar | PIT/ HIC/ SPM | LSA | Calendar Year-End Reporting |
|---|---|---|---|
| Apr - Jun | CoC Competiton | Federal Partner Competition | DST & HMIS Rpt Updates |
| Jul – Sep | Local Fiscal Year-End Reporting | CoC Competition | DST & Rept Roll Out |
| Oct - Dec | Federal Fiscal Year-End Reporting | LSA | Gear up for PIT/HIC/SPM |

# A Year in the Life: Meetings

| Jan - Mar | SA Call | Local shelter meetings | NAEH |
|---|---|---|---|
| Apr - Jun | SA Call | Quarterly governance meetings | NHSDC |
| Jul – Sep | SA Call | Board retreats & Strategic Planning | NAEH |
| Oct - Dec | SA Call | Annual Agency meetings | NHSDC |

# A Year in the Life: Trainings

| Jan – Mar | New user | Refresher | Security |
| Apr – Jun | New user | Refresher | Privacy |
| Jul – Sep | New user | Refresher | Data Quality |
| Oct – Dec | New user | Refresher | Reporting |

# 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

**Jan – Mar**
- BNL Reporting
- Privacy and Visibility
- Referral and Matching

**Apr – Jun**
- BNL Reporting
- CE Performance
- Referral and Matching

**Jul – Sep**
- BNL Reporting
- Workflow Updates
- Referral and Matching

**Oct – Dec**
- BNL Reporting
- Provider Onboarding
- Referral and Matching

# A Year in the Life: Contracts/Monitoring

| Jan - Mar | Vendor contract | 90 day renewal process |
|-----------|-----------------|------------------------|
| Apr - Jun | Governance Documents | 90 day renewal process |
| Jul – Sep | HMIS Agency Agreement | 30 day renewal process |
| Oct - Dec | HMIS End User Accounts | End user survey |

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# Reminder About Reporting Deadlines

- HUD may change specific reporting deadlines based on changing priorities, new report implementation, data cleaning processes, or other variables.
- HIC/PIT: June 30, 2020
- System Performance: submitted February 28, 2020
- LSA Submission: early August 2020
- CE Data Elements: October 1, 2020
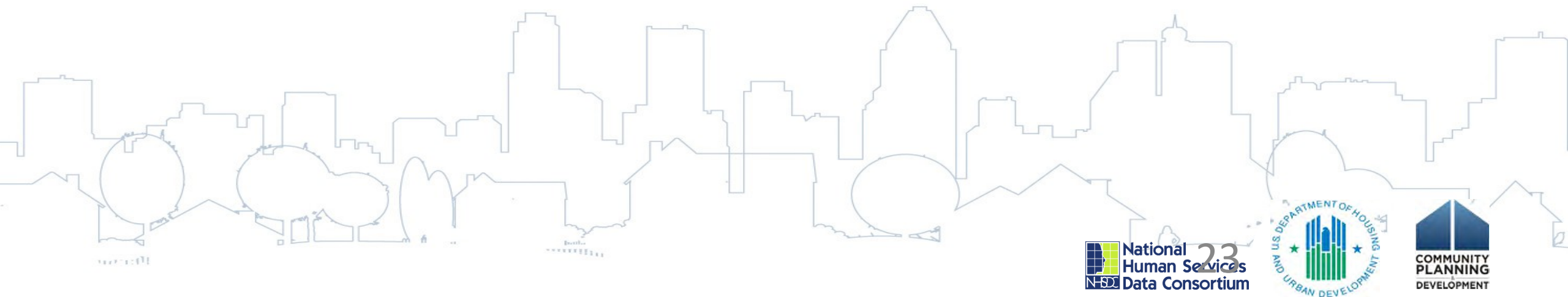
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National Human Services Data Consortium

COMMUNITY PLANNING DEVELOPMENT
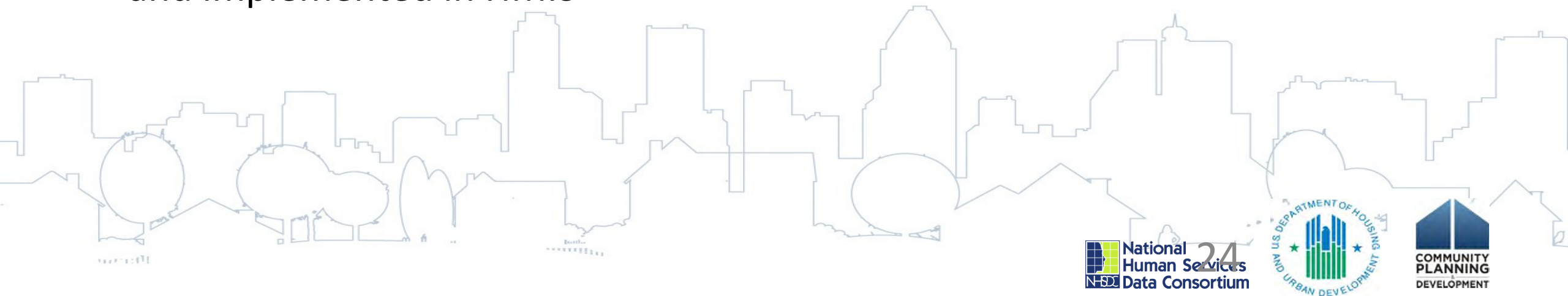
# Thank You!

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