

# **HMIS Project Management and Annual Calendar of Expectations**

[pause]

**0:00:25 Ryan Burger:** Alright, hi, everyone. I think good morning to pretty much everybody who's not on the East Coast. It's just now 12 o'clock my time, it's 11 o'clock Eric's time, we're gonna ahead and get started. So, first wanna thank everybody for joining our session today. As you know, most of us probably would have been together in this time about a month ago. Unfortunately, that's not the case. So we've moved obviously the entire NHSDC conference to a virtual format. So pretty much, we're used to living our lives virtually right now, so we're gonna try to deliver our conference sessions virtually, as well.

**0:01:05 RB:** So my name is Ryan Burger, I'm with ICF. I'm joined today by Eric Gammons who is from the Technical Assistance Collaborative or TAC. We're really happy you could join us for today's session. The US Department of Housing and Urban Development and the National Human Services Data Consortium or NHSDC are really, really excited to be offering, across these three days, online content from May 4th through May 6th.

**0:01:31 RB:** The theme is really Working Together Across Systems to End Homelessness, for those of you who've been to NHSDC conferences in the past or have been planning on going on this one to, in the spring, in Minneapolis, spring 2020, you know that each conference does have a theme, so I think that the one called Working Together Across Systems to End Homelessness is very appropriate, given the work that we do on a daily basis, but especially in times of widespread disease, pandemic, and partnering with folks across systems and providers to really serve those who are most vulnerable and experiencing homelessness.

**0:02:06 RB:** So across the next three days, there are gonna be several 60-minute sessions with two sessions running concurrently. Schedule can be found on the HUD Exchange Training Page with links to join each session, and all content would be recorded so you won't miss a thing. So in the coming days, the presentations, the recording and slide deck and transcripts will all be available to both the HUD Exchange and the NHSDC website, which is [nhsdc.org](http://nhsdc.org). If we're unable to answer any questions that you submit on today's virtual session, virtual webinar, please go ahead and submit those questions to HUD's Ask A Question helpdesk, and that's found at [hudexchange.info](http://hudexchange.info). Just some quick housekeeping items before we get into the actual content for today's session. Each webinar will last about 60 minutes, folks are in listen-only mode, and then, again, you will have access to these recorded webinars in the coming days.

**0:03:09 RB:** So with that, we are gonna do a quick overview of our learning objectives. Again, this session is called HMIS Project Management and Annual Calendar of Expectations. So really, we're gonna try to focus in on about four specific burning objectives today. We first wanna talk about how project management is fairly distinct from other kinds of management. So we're guessing those folks on the webinar today are HMIS leads, HMIS system administrators who are working for the HMIS Lead team, maybe you're connected to the CoC's Data Committee. We wanna think about operating your HMIS project as a form of project management, so understanding the deliverables, understanding different stakeholder expectations, and really importantly, trying to manage as best as we can the multiple competing priorities that we really have to deal with at any specific point in time.

**0:04:08 RB:** We also want to talk about how to identify HMIS Lead responsibilities. We're gonna propose an annual task list across lots of different topic areas or domains, just as an organizing sort

of set of principles. Eric is gonna cover most of that material, but we know that HMIS Leads are pulled in many, many different directions, often with different... Again, different competing priorities with very tight turnarounds and deadlines. We know it's a challenging environment, even under the best of times, when people are asking for COVID-19 assessments or Non-Congregate Shelter Workflows, those are just additional things that we have to work through and make sure we understand the expectation, the responsibility of us, as HMIS Leads, to really fulfill these for our stakeholders.

**0:04:58 RB:** We also wanna talk about prioritizing these HMIS Lead responsibilities. Ideally, according to the time of year, we know some reports have annual deadlines or different types of work can be addressed kind of on cycles, we're not under ideal conditions right now. But even with those constraints and barriers, we still know that there's some work that can be done to help prioritize the types of responsibilities that you, as HMIS Leads, are responsible for. And ultimately, we wanna start to lay out some ideas around training, project management, delegating, these types of team management activities that can help you really develop a more stable, predictable, and efficient HMIS team, administration and be that much of a better partner to your CoC.

**0:05:56 RB:** So we're actually gonna start things off with a poll question. I think we're really interested to see, just get a sense of where folks are at. So we're gonna start with the poll question. The question is, "Is your HMIS Lead team able to plan for data and reporting, monitoring, system administration, and other project management tasks?" You can see the five selections here, please go ahead and pick the one that is most appropriate for you and your team. "Yes, we can plan proactively." "We have dedicated staff by topic," is the second response. "Sometimes we're able to plan, we're usually reactive to what the CoC is asking for." The final two responses are, "No, we have too many competing priorities to stop and plan proactively" or "We don't understand necessarily what our CoC expects from us." We'll leave the poll open for maybe 30 more seconds and we'll review these, review these with you.

[pause]

**0:07:32 RB:** We'll leave the poll on for 10 more seconds. Initial results look like we have some pretty good planners who are joining us today. So that's really, really good news. Great to see. For the most part it looks like about... So the most common response is the third response. "Sometimes we're able to stop and plan, we're usually reactive to the CoC needs." I think that makes a whole lot of sense. Again, we know that to some degree, we're able to schedule out reporting deadlines, training opportunities, different sections of involvement with the CoC, with their board meetings, etcetera. But other times we're not. We're putting out fires, we're troubleshooting with end-users, we're working with our vendor, we're being responsive to customer ad hoc report requests. I think this sort of full breakout makes a lot of sense. And I think that we, Eric and I, we expect some of the material that we cover today to help put you in a better position to be able to sort of plan proactively, maybe turn your number three response into a one or a two.

**0:08:49 RB:** So, we wanna stop for a minute. Just think about how project management, as we're talking about project management, what does that mean in the context of other forms of management that you might be aware of? So we know that all management is concerned with sort of planning, executing, monitoring and controlling. This is a little bit of a different take on the standard sort of Plan-Do-Study-Act cycle, that we go through. Right? It could be setting up a monitoring process, it could be managing a project, it could be managing a team. So we wanna

know exactly what we're doing, that's the planning piece. Executing is sort of putting that plan into practice. Do you have the right resources? Do you have the right training or capacity-building support tools with you? Are you monitoring how things are going? Can you course-correct? Do we know if we need to expand the job description? Do we know if we need to clarify a report request? And then sort of control. Right? Reassessing basically what have we gone through with the first three phases, how do we adjust for when this management cycle comes around again.

**0:09:56 RB:** Project management really has two distinct features. So we're thinking about a very specific or finite time frame, thinking through what is our turnaround? What is our deadline? And then really thinking about unique kind of one-time products, services, results-oriented deliverables. If I'm the Public Health Department and I'm approaching you as the HMIS Lead for a very realistic request around public health or the folks who are in concrete shelters, that in and of itself, that report request can really be thought of as a certain sort of miniature project management engagement, if you will. We know what the report is, we know what the turnaround time is. That is an addition to all of these other management focus areas. So, wanted to sort of lay that out, it's something that is a little theoretical, but I think it's also helpful in helping to manage these types of project management topics or tasks in the context of knowing that there's many, many competing priorities, many competing requests that we're probably being inundated with.

**0:11:08 RB:** Specifically, project management for HMIS Leads, so we're thinking about this construct where we have a project management framework, it is a report request, it is a monitoring update for our CoC executive leadership, it is contract negotiations with our vendors, all of these sort of discrete deadlines, essentially are your projects. So contract and monitoring dates, maybe we're expanding the team, so we have hiring deadlines, hiring processes to go through. We're conducting group training activities and user training events with our HMIS participating agencies, all of this takes prep work, it takes planning, it takes resources. We have to execute against what our intended result is, and then we end up with this type of project management framework, again, across all of these little topic areas to give all of our stakeholders what they're asking for and what they expect from us.

**0:12:07 RB:** So a way to think about this, again, just to help break this down, we think that using some type of project management software can also be really helpful to sort of organize all these many moving parts, but the principles of project management to each deadline, on time, on budget, within scope is really what we're asking for. Defining what you're doing is really, really critical. Many HMIS Leads might not have a contract or sort of the scope of work with their CoC partners to kind of understand what they should be doing. There may be gaps in end user agreements or participation agreements, where the end users or the HMIS participating agencies don't fully understand what they're responsible for. So any gaps in clarity, any gaps in definitions, any gaps in expectations really can be addressed pretty quickly and efficiently through these types of project management frameworks.

**0:13:05 RB:** Something else folks have probably heard about is this idea of a SMART goal. So something that's specific, it's direct, detailed and meaningful, it's measurable. So how are you quantifying performance, how are you tracking or monitoring progress towards that goal? They're attainable. We don't wanna promise the public health authority a report that we can't deliver on or we've never collected the data in HMIS for. So we wanna be aware of any of those constraints as well. And then, thinking through sort of the relevancy and timeliness, how does this fit with the HMIS Lead's mission? How does this empower or enable the CoC or other mainstream partners to

also support the work around ending homelessness? And then again, this timeliness, this time-bound idea, part and parcel to any type of project management framework.

**0:13:58 RB:** Real quickly, before I turn things over to Eric, as just a couple kind of rules of the road, as far as project management is concerned. We know that HMIS Leads and HMIS Lead teams, and system administrators, they're kind of in this freeway intersection, really the nexus of CoC partners, HMIS participating agency partners and your HMIS vendor, your software providers. So some of the things that we think are really helpful and valuable to HMIS Lead teams as the project managers for HMIS, on behalf of their CoC, are to really build you up in a kind of keep this open-door, be active and participatory in CoC meetings. As far as engaging with agency staff, kinda meet them where they're at. If there's an agency who needs some one-on-one support or who needs some additional training to help their staff best meet the needs of the clients that they're serving, by all means, that should be something that is prioritized.

**0:15:01 RB:** So a very concrete example could be holding a focus group with agency frontline staff or even leadership when data quality standards are not being met. We know that data quality is very, very critical to how CoC performs, what they can do in terms of report submission, what they can do in terms of system modeling. We wanna make sure that those tools are available to every HMIS participating agency, whether or not they receive HUD funding, whether or not they're a faith-based rescue mission. We wanna make sure that those who are providing us with HMIS data are supported and empowered as much as possible. Also, think about a team commitment. So making sure that you are a good faith partner, that you're active, that you're easily accessible and that you're meeting the things...

**0:15:50 RB:** Again, I'm gonna go back to the slide previously, some of these deadlines, some of these project management descriptors or definitions are really, really helpful in the context of demonstrating what value you can provide and making sure that folks know how to be prepared for when you ask things of them. We need HMIS end user feedback on how the software is performing. We need CoC Data Committee feedback on the report results of our COVID-19 assessment and screening. Is this data valuable? Is it of high quality? How do we put ourselves in a position to use this data really moving forward? So the slide topic or the slide here speaks to participation consistency, emphasizing partnerships, obviously really, really critical.

**0:16:47 RB:** Also, some other rules of the road. Be accountable, make sure that you are aware of the things that you don't know. Have we been working with blinders on? Have we been so focused on system administration that we forgot the data analysis and interpretation that provides a lot of values to our stakeholders? So thinking about ways to solicit feedback, holding, specific to the HMIS Lead team, internal team, meetings to sort of outline the expectations, use meeting times to problem solve, not just provide updates, that's a really helpful way in which we can use these performance review opportunities to both improve the way the team functions internally, as well as how we provide services, data, training opportunities to our external partners.

**0:17:44 RB:** And then lastly, this is probably the most virtual piece. HMIS Leads, I mentioned this before, we're managing partnerships across different stakeholders really with very different end goals, really with very different deliverables in mind. What you wanna provide, in terms of partnership services information to your CoC is gonna be very different from your conversations with your HMIS participating agencies, of course, your HMIS software vendor, and specifically the team or the staff members that make up your HMIS Lead team.

**0:18:20 RB:** I wanna stop for a minute and think about the role of delegation. I am not personally a very good delegator. I kinda tend to keep work pretty closely held, gotten me into all sorts of trouble in the past, but delegation is really, really crucial. Again, we're managing multiple priorities across multiple stakeholders really with a lot of different deadlines or competing priorities, so just stopping to think about the role of delegation, and how crucial it is. And they can provide us, put us in a place to succeed ultimately, but also again, demonstrates some of the pieces that we just highlighted on the previous slide. It shows our commitment, it shows our ability to deliver, it shows our willingness to be a good faith partner across all of our different stakeholder groups.

**0:19:11 RB:** So delegation, we wanna call out one specific example. When you're delegating tasks to one team member, it's a more efficient and effective way than if you have to delegate a specific task across, let's say a team of three. So the example here being if three people are necessary to develop a report, you might have a database administrator to sort of pull the data, maybe a data analyst or data scientist to kinda build the report, filter the data, structure the data, and then a reports analyst to interpret the data, make sense of this, draw some interpretations and conclusions from the data. And that report can quickly fall apart because you have three different touch points across how the data's pulled, how the report is put together, and how the data is ultimately used.

**0:20:00 RB:** The report can be delayed pretty easily at any of those one points, maybe there's a lack of clarity or understanding around what this report needs to include, what it shouldn't include. We start to lose value when we're delegating tasks that could be done by one person across larger teams, multiple stakeholders. The same is if we're communicating data to external partners. Somebody might clearly understand the caveats around data element response categories, how things are defined, other folks just might not have that knowledge, they might not have that awareness. So, understanding who our audience is, both internally and externally is really a pretty important piece, when we're thinking about how to deliver within our project management framework.

**0:20:49 RB:** Also wanna think about communicating expectations for their results, right? If we have to rely on three, teams of three, to generate a single report, we have to sort of go back at each phase or at each step, and think about what does the report look like in its final format, how should an agency maybe prepare for on-site monitoring? So finding these who, what, when, where and how is really vital to the work that we do as HMIS Leads, right? It sets clear expectations and then we can deliver against these clear expectations in a transparent and a clearly defined approach.

**0:21:28 RB:** Lastly, thinking about the delegation piece, right? Delegation is crucial. We also wanna think about delegating responsibility and authority. So, if we're HMIS project managers, if we're HMIS system administrators, we are in a position to delegate this type of work. Managers can't possibly be... Can't possibly define the how for everything we've done, needs to be done or accomplished. So if we're thinking about this project management, again one of the distinguishing factor of project management versus other project management being, you have a finite goal with a defined deliverable; what that deliverable is, we might not be concerned with how it gets done, just with the what. And so understanding when we need to give up control to make sure that we're meeting the needs and expectations of our stakeholders, really, really critical.

**0:22:20 RB:** Some of what we're gonna talk about in the next session or the next section, rather, is how to delegate this by sort of topic area, right? Here are all the reports, here are training priorities, here are coordinated entry workflow updates. We just need to know that this work is getting done,

we don't always need to be concerned with the process, basically. Then lastly, the piece about delegation that I wanted to highlight is making sure that we have meaningful and regular feedback loops, we don't wanna be micromanagers. We wanna know enough about the progress and tasks to address things if they need to be addressed, if the work is behind, where it should be, given the approaching deadline, what additional support or resources can we bring to the table to make sure that we get back on track? Maybe if we had to delegate tasks across multiple people instead of one, how do we make sure that that communication and those expectations are clearly defined?

**0:23:14 RB:** So we wanna think about the supporting type of work, this sort of leading from behind, that we as project managers or HMIS team managers can provide with the rest of our team and ultimately, our CoC partners and HMIS participating agency level staff. That's a lot of information. Again, really trying to set the stage for why we're talking about project management, given the very, the very discrete paths, the competing priorities that we know folks are faced with.

**0:23:47 RB:** So we're gonna shift to more of the concrete action steps, this whole idea of the calendar of expectations with Eric's section. But before we get there, wanted to throw out another poll for folks. So we'll open up the poll and we wanna hear from you. We wanna hear what would provide the most benefit to your HMIS Lead team to actually help manage some of these priorities and expectations?

**0:24:13 RB:** We just ran through some rules of the road, some possibly best practices around how to improve what the HMIS Lead is doing or how they're managing projects. So yeah, let's hear from you. Utilizing project management software, increasing task delegation, increasing the number of staff on your team, clear expectations from the CoC. We know from the first poll that that's something folks are looking for. And then lastly, sort of having a more dynamic, a more flexible staffing model to help respond to these changes. So we'll leave the poll open for another 30 seconds and I wanna hear from you.

[pause]

**0:25:20 RB:** Okay. I see a few more responses coming in. We'll go ahead and close the poll. It's looks like most people who were gonna respond have done so by now. It looks like for the most part, more staff, again.

**0:25:35 Eric Gammons:** More staff.

**0:25:36 RB:** That is not a surprise to Eric and I. The next two responses are pretty interesting. We see some folks really thinking that utilizing project management software could be helpful, as well as clear expectations from the CoC. That's great, very helpful. So with that I'm gonna go ahead and turn things over to Eric for the next section of our presentation.

**0:26:00 EG:** Hi, good morning and good afternoon, everyone. Thank you for being here, welcome, everyone, it's gonna be a great next three days [0:26:08] \_\_\_\_ we'll have taken... Thank you, Ryan. We'll hear more from Ryan toward the end of the webinar. What we were thinking is we were gonna have a pretty good discussion in person, when we're having this in Minneapolis. However, because of the situation, we're still gonna try to have some discussion about some helpful management practices or software tools that you might have used. We're hoping that you can utilize the chat to indicate some things you found very helpful in managing your time, managing the calendar, and

even managing staff. So, hopefully use the chat. And then toward the end of this webinar, this workshop, we will see what we came up with and maybe have a little bit of a discussion about that and Ryan can help facilitate that piece.

**0:27:00 EG:** So what we're gonna be looking at next is sort of a way to organize the task or the goals that your HMIS Lead agency has, as far as what they need to do. One of the tools that's been used in the past in NHSDC is sort of a color-coded quarterly design of task. And it's broken down into reporting, training, meetings, coordinated entry, and then contracting, sort of the business side of it. What we'll look at first is during the year, the life of reporting and funding, and this is all color-coded, legend-coded. So keep in mind that for this tool, the reporting funding is gonna be red or similar to red. This is a bad piece for me 'cause I'm color blind.

**0:27:57 EG:** Oh, and by the way, happy Star Wars day to everybody, and don't forget, tomorrow's gonna be Cinco de Mayo. So we'll get to go do absolutely nothing, 'cause we're still locked in our homes down in South Louisiana.

**0:28:11 EG:** So looking at the first quarter, you could see Point-in-Time, the Housing Inventory Count, and the System Performance Measures are included in that piece, along with LSA and the calendar year end reporting. A lot of reporting is done using the calendar year as opposed to the fiscal years. So really, that's one of the points that you need to look at in the first quarter. I will say this is an example and many HMIS Leads are gonna be different... Oh, I see, "May the force be with you" in the chat. Outstanding. But this is just an example, but you can certainly use this example and change it to your needs. We don't expect you to follow this exactly. And also, it is broken down by quarter. Because generally, a 90-day goals or 90-day task is an acceptable management piece for most businesses. Looking any further out than 90 days, generally you don't get things done, they get put up on a shelf. And then you only need them when the fire's burning and you need to put out the fire. Oh, I just lost my slides... Go back, thank you.

**0:29:29 EG:** So the second quarter, if you look at CoC competition generally begins in that quarter. There's a lot of time involved or spent working with the CoC during this time. If you're an HMIS Lead, there's also federal partner competitions going on. They may need data, they need a gaps analysis, some piece like that. And then the data standards generally and the HMIS report updates are just kicking off during that second quarter of the year. So those can have major effects on the work you're doing, on the training that you need to do. And so it's important to keep up with the updates during that time.

**0:30:12 EG:** In the third quarter, of course, a lot of people's fiscal year ends in June. So July, you start looking at your costs, start doing the budgeting and reporting out to your auditor. Also, the CoC competition is going full steam right then, normally. And so you'll be asked for a lot of information, both on project performance, gaps analysis, coordinated entry analysis. There's all kind of pieces that'll take a significant amount of time during that third quarter. And then of course, you'll be rolling out any new data standards or you might be rolling out a new report. It's significant especially toward the end of September, and it can take a majority of your time as an HMIS Lead.

**0:31:08 EG:** On the fourth quarter, with the federal government ending their fiscal year, a lot of times, you'll have a lot of... Sorry, my phone just beeped. I thought I'd get cut off... A lot of times you'll have reports to the Feds you'll have to do, the LSA is absolutely due at this time, and it's time to start looking at your data for the previous year. Actually, I think you should be looking at LSA



every month. But that's just me. It's complicated, there are a lot of pieces to it. Also, during this time, look at your HIC. Look at your Housing Inventory Count. It's based on the fiscal year, the fiscal year starts October 1st so you really should tighten up what you have in the system, make sure it matches what your actual inventory is out in the community. That way, you're getting started for your next LSA right on point. You don't have to go back and correct things. So this is just some general ideas of reporting requirements during the year. And we'll move on. Oh, I do wanna have a disclaimer.

**0:32:22 EG:** Although these are generally things that happen during the year, know that this year, a lot has been changed with the COVID-19 epidemic and a lot of these due dates for reports have changed or at least some of them. And we'll go over that toward the end of this workshop.

**0:32:48 EG:** So the green on here is meetings or what you might expect to have as far as meetings. You should be attending the system admin lead call that only occurs right around the third Wednesday of every month. It's a great call, it gives you the most up-to-date information and you should just have that plugged in to your calendar every month when it occurs. To access the information about those calls, you'll need to use a software called Sakai, and you can access it by, and I believe this is correct, [hmis@cloudburstgroup.com](mailto:hmis@cloudburstgroup.com). But I'm sure we can get that information clarified, but I seem to remember that's what it is. And that's the software you can go on and find out when the next webinar is, when the next HMIS Lead meetings are occurring. And also, there's recordings and slide decks from previous meetings. So it's a great source.

**0:34:00 EG:** So let's just look at the meetings. Here, they're suggesting you have your local shelter meetings in January. There's a good reason for that. That's when your Housing Inventory Chart's normally being worked on the most, you really need to be contacting them, making sure you have the right inventory accounts. And certainly, make sure that they conducted a Point-in-Time count for the end of January. Also National Alliance to End Homelessness normally has a conference. It's the family conference if I remember correctly, going on during that first quarter. The second quarter is a good time to have your quarterly governance meetings with your CoC and other participants or other people that are interested, you maybe have a Data Committee. But the governance meetings are a good time to be had by here because normally, the CoC is not real active in the application or monitoring periods. Most projects don't start until the second half of the year. And so, generally, CoCs monitor around that time when their program year ends.

**0:35:23 EG:** So this is a good time to discuss your privacy, your security plans, your data quality plans. It just fits right there and it gives you a nice prep for the CoC competition in the second half of the year. Also, NHSDC occurs normally in the second quarter of the year, which is what we're emulating with this virtual conference, which I think is awesome. The third quarter, again, system admin calls are going on. So you just need to make sure they're in your calendar. You may also pick this time after, especially if your fiscal year ends in June, you may have board retreats and conduct strategic planning at this time on an organizational level. And there is a National Alliance to End Homelessness conference, generally I believe it's at the end of July in DC, although I don't think that's gonna happen this year. But we'll see. I don't know if it's been canceled. Do you know if it's been cancelled, Ryan? Sorry.

**0:36:36 RB:** I am not sure yet, no.

**0:36:39 EG:** Okay. Oh, also, this time is a good time to do budgeting. And in fact, all times are a

good time to do budgeting but I just wanted to throw that in there. You should be budgeting for your HMIS Lead. You should have meetings, budget meetings at least a couple times a year, either at the end of your fiscal year and maybe in the middle of your fiscal year. Budgeting is incredibly important. And I'd like to do a shameless plug. Tomorrow, there will be a HMIS Lead Budgeting Workshop at 1:30. So feel free to join.

**0:37:21 EG:** You also have annual meetings at the end of the year. And again, another NHSDC conference typically happens in October, I believe. So that just gives you an idea of generally what meetings you'll attend or you'll need to attend or keep track of or appoint staff to. Next is blue. Okay, I'm colorblind. I'm sorry. Yes, it's blue. So blue will stand for trainings in this mockup calendar. Trainings are ultimately important and are going to take a lot of your time. It's just a part of the job. You should be having new user trainings at least once a quarter, but I would recommend monthly, you should be having refresher trainings once a quarter or maybe monthly.

**0:38:26 EG:** And if you're using maybe a recorded webinar to do trainings or some video, at least quarterly you should be looking at that video or that webinar, and making sure that it's still accurate and up-to-date. You shouldn't just make one and let it sit for two years because things change and you may make changes in your workflows or your data set you're collecting and that webinar quickly becomes not only not useful, but it can misdirect the users and cause errors you don't really need.

**0:39:06 EG:** So another thing is, if you'll notice on here, they're suggesting doing one of your plans each quarter. So looking at your security plan and doing a training on your security plan at least one quarter a year, maybe reviewing and doing a privacy training one quarter a year, data quality training, one quarter a year. Data quality, people know all about it, because they know what they did wrong. But I don't think they always understand the parts of data quality: Timeliness, the accuracy. All they know is they didn't fill in something... The completeness. That's the one data quality piece everybody knows. Oh, I got a bad completeness. But there's other parts of data quality, including timeliness and accuracy that needs to be discussed and looked at and talked to, and people should be trained on it. So I do recommend it, although it's reflected here, data quality once a quarter, I think probably data quality should be a training you can do at least quarterly. I'm sorry, it's reflecting one quarter a year, but I think it should probably be done quarterly.

**0:40:31 EG:** Now this is just a little brief piece on data quality and training, and how important training is to data quality and how important training is to really getting the data you need and want in your system. I just mentioned fires are put out for you from strategic work. I would think that fires are the last thing you want, and hopefully you don't have to put out fires too often, especially when it comes to data quality. Now, when somebody mentions to me that they're trying to improve their data quality and what they really mean is they're correcting data, that's not really an accurate way of improving data quality. You'll never catch up that way. What really improving data quality should be is training staff, making sure they know how to put data in, making sure they know what timeliness is, making sure they know what completeness is, what accuracy is. And frankly, one of the most important things to improve in data quality is training people on workflows and improving your workflows.

**0:41:41 EG:** So if part of your training is purely workflow, definitely talk to your users and see what you could do with your workflows to improve them and make them easier, 'cause the easier your workflows are, the better your data is gonna be. Alright. Back to the quarterly charts. So now

we're looking at orange and orange is gonna stand for Coordinated Entry Data Management. So a year in the life, well, we know probably coordinated entry better than anything else in the moment, except for COVID-19. Coordinated entry involves a lot of By-Name List reporting. And By-Name List reporting generally is very dynamic at this point, meaning that CoCs are constantly changing what they need and what they wanna see on their By-Name List. And so that takes quite a bit of time for an HMIS Lead to number one, assess what's needed, number two, assess if they can actually produce that kind of list or what other data they need to collect to produce the By-Name List. Or maybe there's a By-Name List and HMIS is just contributing to it. Still, it takes a significant amount of time. And then just following up to make sure that that list is being updated, folks are being taken off the list. It's just a never-ending time-consuming activity at this point.

**0:43:08 EG:** Hopefully in the future, things will be nailed down. You'll get settled into a process, procedures and what data you're gonna collect, and it'll be a little less time-consuming. But right now, you can just plan on spending a significant amount of time as an HMIS Lead on your By-Name List reporting. You should also be looking at privacy... Privacy and visibility for your coordinated entry system. What the uses... What the disclosures are, what releases need to be signed, what you're gonna be releasing. There's quite a bit to discuss with your Coordinated Entry Committee, if you have one, with your CoC, of making sure that you're not releasing too much information about an individual, but also enough where they can be housed appropriately and giving them best opportunities to succeed.

**0:44:13 EG:** Moving on. There's another piece you'll see Referral and Matching, that's every quarter of the year. Every quarter of the year they're recommending that you look at how well your referral and matching is working. Referrals can be done through the system or can be done outside the system. But certainly, you should be tracking the results in your HMIS system. And so you'll be able to look at how well a referral matched with the appropriate housing option. The big piece here, of course, is to keep things updated and to be able to report out something that makes sense to your CoC. So a lot of, even though this is a year in the life of coordinated entry, this really has a lot to do with reporting when it comes to Coordinated Entry Data Management.

**0:45:10 EG:** Now, we also see a few more quarters broken down where we have coordinated entry performance, which is similar to what I just talked about, workflow updates, which are incredibly important. However, you don't wanna change your workflows too often because it takes retraining quite a bit of people in some of your communities. And then provider onboarding, I love this one in late December. It's a perfect time to look at what new providers who are working with persons experiencing homelessness might be interested in using your system. The more folks we have that are working with this population, the better data we'll collect, the better performance the entire system of care will have. And October-December is a really good time because a lot of your other mandates are not as heavy during this time, and you could start working with this provider at the beginning of the year. Makes a nice calendar year update.

**0:46:24 EG:** So our last color legend is... I think I missed one... Is contracts. Contracting is important and monitoring is also equally important, but it doesn't happen all the time. Monitoring does occur or you would like to see monitoring going on about every 90 days or every 30 days. I think that the contracting, the vendor contract, is one of the most important pieces and you should be prepared to spend quite a bit of time concerning that contract. The RFP, the negotiations, the legal ramifications, all of those pieces are ultimately important. And today at 1:30, if you'd like to see more about vendor contracting, there's a Contracting Workshop going on. So I think that starts

30 minutes after we finish... I'm sorry, not at... Yeah, 1:30 Eastern time.

**0:47:37 EG:** So the reviewing of the governance documents generally is done with, maybe you have a Data Committee or HMIS Committee or you have an Executive Committee of your CoC, but normally you need to do that about about once a year, just to make sure that your governance is following what your actual procedures are, and what's going on in your community or your CoC. If you have a privacy plan, if you have a security plan, if you have a data quality plan that nobody's following, then either they're not trained correctly or the governance documents don't reflect what's currently being done, and so you should at least review that once a year. The second half of the...

[pause]

**0:48:47 RB:** Okay, it looks like Eric's ear buds decided to quit. So sorry the hear that, Eric, I'll try to pick up. So, yeah, we can wrap up the contracts and monitoring piece, but I think that the key point is really gonna be shown on the next few slides. So we're walking through really at the topic area at the domain level, all of the different work that an HMIS Lead is expected to be doing. And I appreciate folks who are contributing to the chat box helping to share some ideas around how to make sense of all of this but... So here's a quick template. This is gonna outline our really, annual calendar, this is in the session title, this is one of the things that we're working towards. So taking what Eric had been talking about across all of our reporting deadlines, we're trying to meet reporting needs obviously for HUD. Other federal partners, we have state stakeholders, we have local perhaps funders, we have local agency partners...

**0:49:54 EG:** Hey, Ryan, am I back on?

**0:49:56 RB:** Yeah, I can hear you, yep, yep. We're just starting to frame what our calendar kind of looks like so...

**0:50:01 EG:** Oh, fantastic.

**0:50:02 RB:** We'll go through quickly, yeah, and get to the colors of the rainbow, if that's okay.

**0:50:14 EG:** Just keep in mind this is all color legend. So, of course, green means the meetings, blue, I believe that's blue, is trainings. And actually, I'll go back. Let me go back to... How much time do you wanna have at the end, about 10 minutes? So you can see that they've sort of plugged in for the... Wow, that was an unfortunate time to get my phone cut off. Let's see. So in the red is generally, that's your reporting period. And just to be clear, this is just a tool that was pulled off the internet. There's a bunch of different calendar tools. This one's really nice, it shows every day of the year.

**0:51:10 EG:** And what this does is the light red colors... I don't know if you talked about this at all, Ryan, but the light red colors are sort of your how much time do you think it'll take to work on a report. And then, of course, the darker color is the due date of the reporting period. So you'll see a lot of time spent in January because our reporting is that Point-in-Time and the housing inventory down in May. So you might be looking at the CoC competition or maybe this is data standards or new reporting that you're gonna start looking at, of course, in August. The CoC competition in September. So this just kinda gives you an idea of some of the reporting requirements you may incur. And then, of course, you'll see December is all reporting 'cause there's... This particular

model's anticipating that you are preparing for your HIC and Point-in-Time and also working on your LSA.

**0:52:19 EG:** So the green, again, is meetings. This just shows you how much time you could possibly spend on meetings. Oh my God, right now, there's so many meetings with COVID-19, but just on a normal basis, HMIS Leads are obligated to attend quite a few meetings, CoC meetings, committee meetings, combine that with national meetings to get updated on the latest trends. You'll find yourself in quite a bit of meetings and it's very reflective of this particular calendar for meetings.

**0:53:00 EG:** The blue is, once again, trainings. And I really like the staggered training here because a lot of... I've seen where some HMIS Leads will schedule a new user training the exact same day of the month, every month. And sometimes that just doesn't work out for users or is a bad time for an agency. So it's nice the way they staggered this particular calendar out for the trainings. I really like that.

**0:53:31 EG:** We're getting toward the end. And of course, purple is contracting and as you can tell, and monitoring, just generally once a quarter, you can spend a significant amount of time on monitoring and contracting up to about 20 days a quarter. So you put all that together and that's what this is... Don't worry, this will make sense in a second. So we're gonna put all that together and you're gonna see that your calendar can be really busy. And Ryan mentioned earlier about delegating authority, delegating tasks. This is why, because there's so much that you need to do during the year as HMIS Lead. It can just really... You can get caught up and end up just putting out fires and never planning for anything. So this is a heavy, this also indicates times of the year where it's really busy, where it's really heavy. And you might wanna look at prioritizing some of your tasks. You may have to address staff concerns.

**0:54:49 EG:** You might have to bring somebody in, or perhaps even bring an extra staff in at certain times of the year or contract with another company during certain times of the year where, if your HMIS Lead office is too small, you may just be overwhelmed with the tasks or to-do. And it's also kind of pretty, I kinda like it. I did mention that this year, some of the normal dates when national reports are due and when other activities are occurring are sort of thrown off by the COVID-19 response from HUD, from the DA, other funding sources. And as of right now, this is the most up-to-date information we have. The HIC and the PIT are not due until June 30th of this year. System Performance Measures should have already been submitted, or at least the draft, and LSA is... The commission's gonna be a early August, now that's gonna be for the 2019 year, the 2019 year. And then the coordinated data... Coordinated entry data elements, which were supposed to start in April are now occurring in October 1, with that in mind, because you don't have to implement them 'til October 1, the actual coordinated entry APR will not be due 'til after October 1, 2021. And I think that's all I have, Ryan.

**0:56:45 RB:** Okay, great, thanks so much, Eric. We are quickly coming up to 1 o'clock on the East Coast. Thanks everybody for contributing to the chat box. Looks like Gwen is gonna organize a demo of some project management tool, Gwen from Washington 508 CoC. So, that's a pretty cool takeaway, I think, from our session. There are lots of different project management tools out there. I think my only comment is, those are very helpful tools, I think really introduced now, when everybody's working remotely and virtually, and we have lots of different pieces, where we just have lost some of this in-person kind of physical interaction, that that can be really helpful to sort of

stay on top of the different task work with different deliverables and deadlines that we're working towards.

**0:57:41 RB:** So introducing some sort of project management tool or software might actually be a really great idea to do at this specific point in time. They're really only as good as, you get out what you put in, right? So if you set up a project management tool and only update it on a monthly basis, you're gonna miss a lot of the important nuance and management benefits that those types of project management platforms tend to provide. So if you're gonna move towards that type of project management software or platform, then think about what it means for your day-to-day communication, and the way in which work is delegated to sort of make those platforms and softwares like a central focus for how your team operates, and what it means when your deadlines...

**0:58:31 RB:** Excuse me, your deadlines are switching from green to yellow to red on your Gantt chart or your calendar. So, just thinking about what it means to incorporate one of those platforms and then how to really put into it the amount of effort that will lead to something very, very concrete and tangible in return.

**0:58:48 RB:** So two more questions, I think we can get through these and not go over by too much but... Question from Stacy Matthews in Montgomery County, Maryland. She has said that we have a... They set up a good infrastructure with an HMIS Task Force. It's actually staffed by participating agencies. What they need is sort of a central tool to organize and coordinate that work. Again, probably a project management software platform could get you part of the way there. I think what would also be helpful if this work hasn't been done already, is just to make sure that those roles and responsibilities of a task force that's staffed by participating agencies, and that was really clearly defined. Presumably, agency level staff won't be setting HMIS policy or necessarily doing, engaging in a monitoring process.

**0:59:39 RB:** What they're likely to be doing is sort of reviewing workflow, reviewing report capabilities in the software, making recommendations for how HMIS as a tool can really be enhanced and improved to coordinate care, perhaps maybe share data, maybe access new and different types of the standard reports that we're familiar with, so making sure that there's a clear set of expectations for what's in scope and out of scope of this task force, I think would be really helpful. And then, we can put some of the logistics and mechanics in place. How often do they meet? What's the goal of each meeting? Making sure agendas are out in advance. How does that information get funneled upwards to a CoC and HMIS level decision makers? That would be probably my only suggestion. Eric, I don't know if you have any other thoughts on the idea of this task force.

**1:00:35 EG:** No. I did want to suggest though, I saw there was a question about tracking work. A good ticketing software tool is always very helpful. A lot of the new ticketing tools can keep track of more advanced tasks with objectives and time, due dates, and plenty of places to note things that are accomplished, accomplishments, and note problems or issues. So a really good ticketing tool or ticketing software is helpful.

**1:01:12 RB:** Mm-hmm, great. I think our last question, probably in the interest of time, is a question from Laura. This is definitely a relevant question. Laura asked if there are any tips for medium-sized CoCs where there is only one HMIS person? So we have sort of an FTE staff of one per our HMIS Lead, wearing at least five or six hats across reporting, training, system

administration, contracts, etcetera. Two things that come to mind, HUD has been very strongly encouraging HMIS consolidations and mergers separate from or in addition to CoC mergers. I think looking at your sort of regional basis of HMIS administration or participation, seeing where there are efficiencies of scale, seeing where you can leverage somebody else's area of expertise, whether it's reporting, system administration, consolidating contracts, so that only one HMIS Lead or one system administrator holds that responsibility, could be a very good and helpful opportunity to look at. I think the other thing really comes down to thinking about who does what.

**1:02:35 RB:** I think a team of one person is never going to be as effective as possible, if the expectation is that the HMIS Lead carries out all the different roles and responsibilities. There's nothing that HUD says that prohibits some of these different color-coded topic areas from being carried out by your CoC Data Committee, or being carried out by, to use Stacy's example, the HMIS Task Force. I think having a task force of providers and HMIS end-users to identify training needs, could be a great way to maximize their knowledge and expertise. Maybe looking at the CoC Committee to take a more active role in vendor contract review, could take some things off of your plate. Maybe there's a subcontracting opportunity with a local philanthropic institute, a university or college who has master's level students who could support some of the reporting processes. All of these areas would provide opportunities to work more effectively, and make sure that you're able to provide the quality and quantity of service to your different partners that's really expected of you. I think it's hard to get to that point when everything is expected of a single person, so thinking through how we can divide and conquer almost, might be a strategy that makes sense for you. Eric, anything else you'd like to add?

**1:04:08 EG:** No, it looks like our time is up.

**1:04:11 RB:** Our time is up. I wanna thank everybody again for joining us. It's sort of a first... The first initial kick-off session for our remote virtual NHSDC conference over the next couple of days, again, provided by the National Human Services Data Consortium, and with HUD's support.