



Project Management for HMIS Implementation and Operation

The “Effective” Side of Project Management

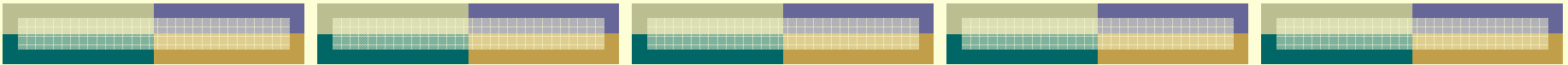
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National HMIS Conference
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Chicago, IL

Sponsored by the U.S. Department of Housing and Urban Development



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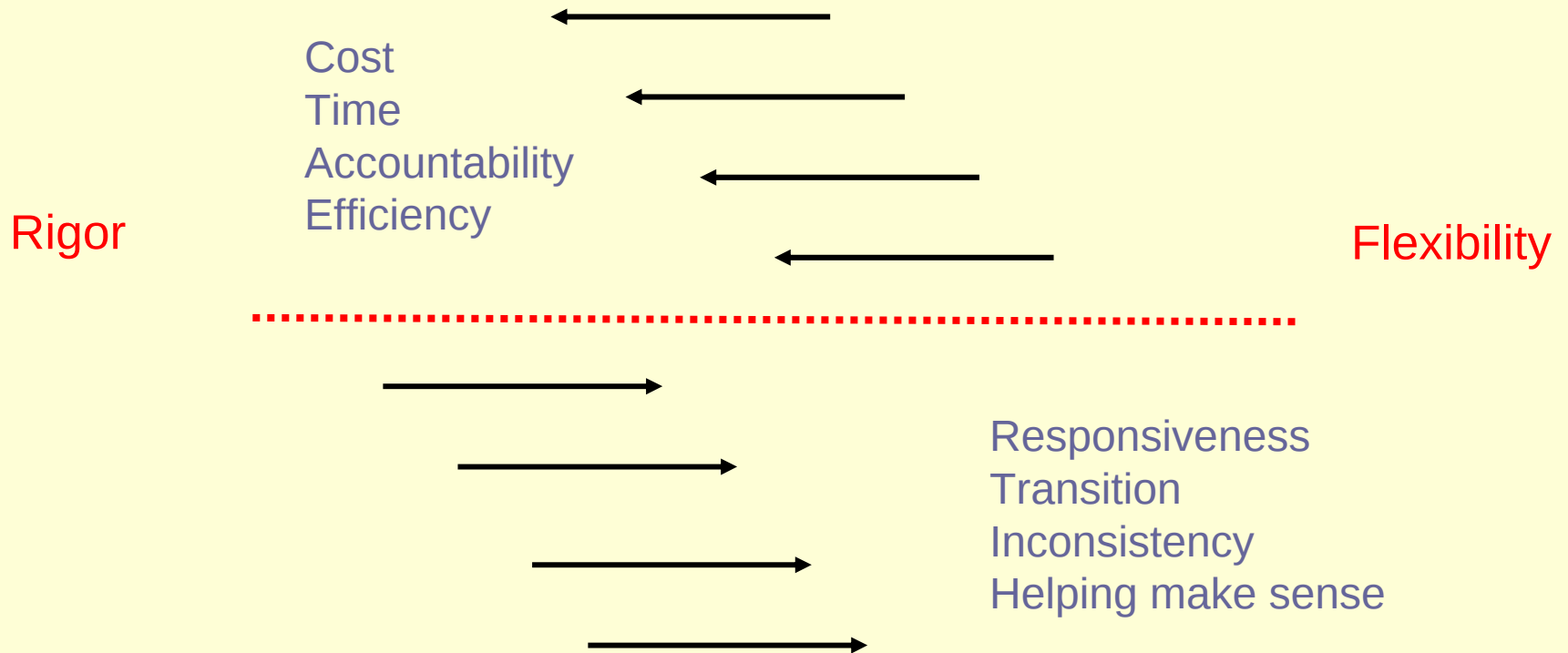
- HMIS Project Management Context
- Project Management Cycles
- Managing Expectations
- A Strategy to Deal with Contradictions in HMIS Implementations

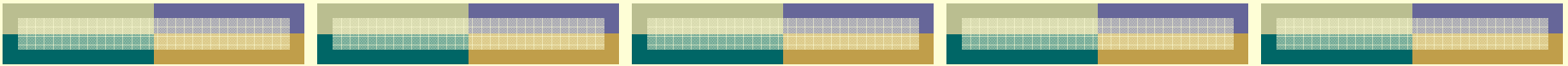


HMIS Project Management Context

- It is filled with uncertainties, risks and contradictions
- Requires addressing the concerns of multiple stakeholders that often bring conflicting values and norms.
- It is paradoxical.
- Project Management is not standard practice.

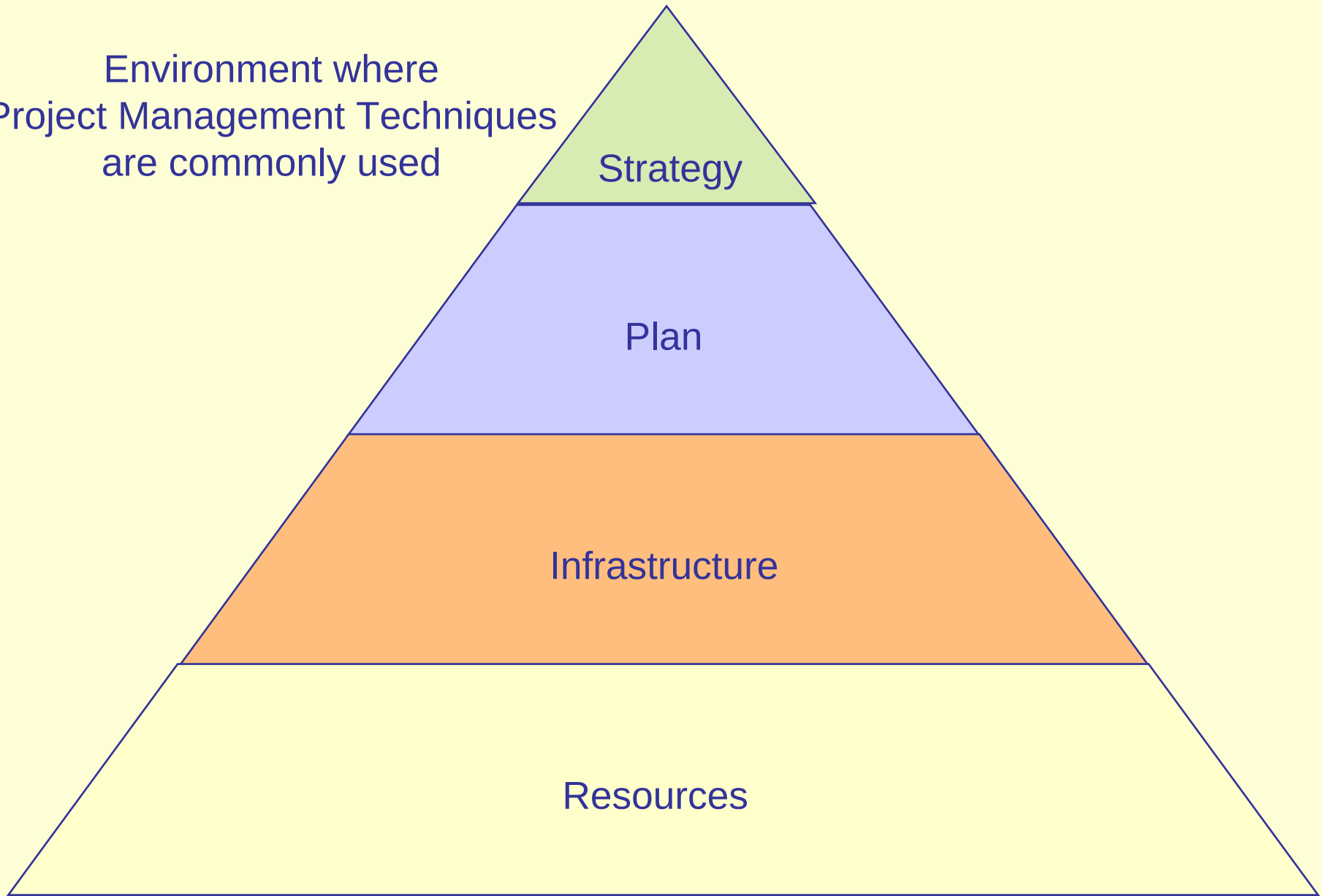
The HMIS Paradox



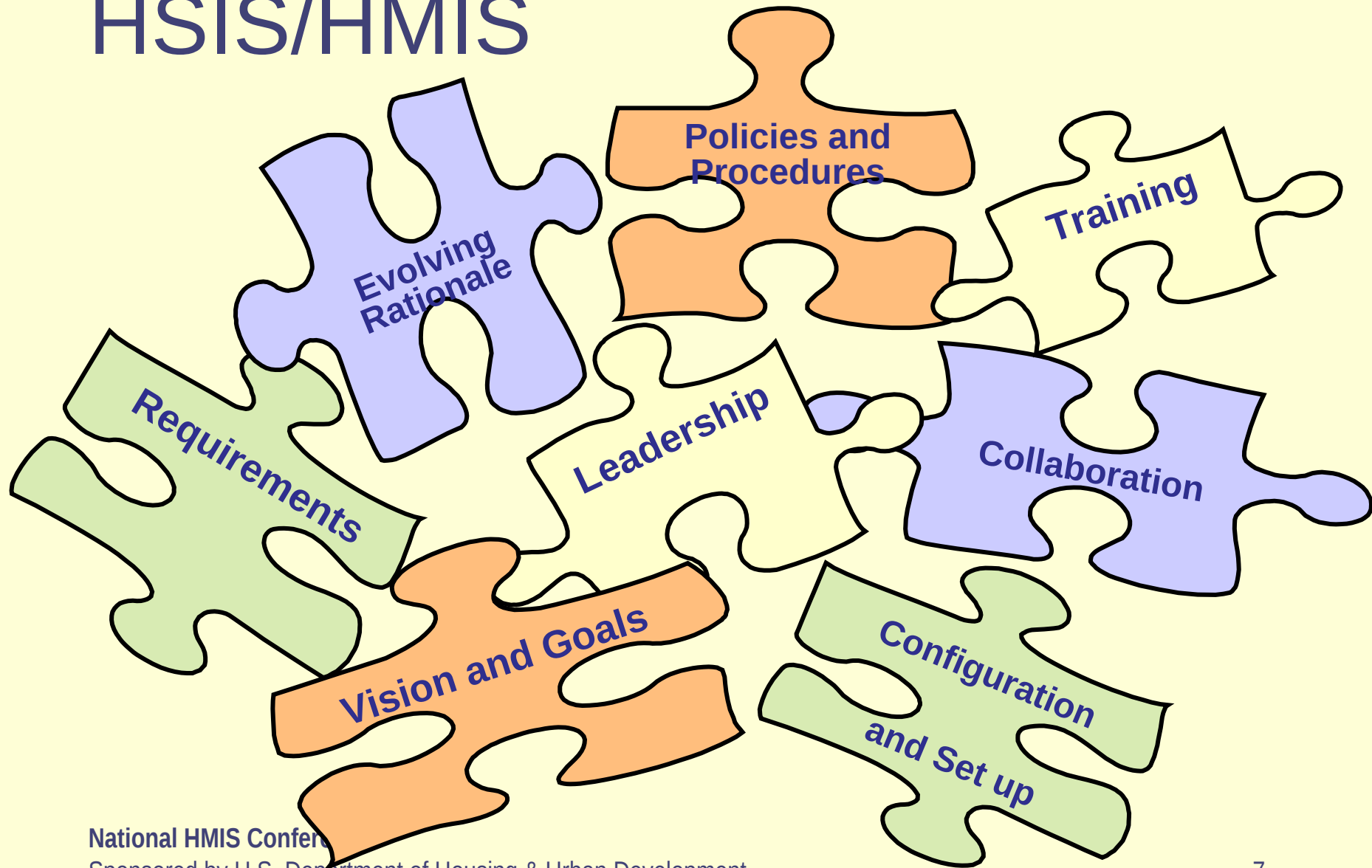


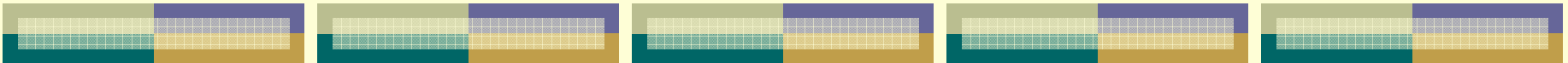
If we compare HMIS initiatives with
initiatives where project
management is commonly used . . .

Environment where
Project Management Techniques
are commonly used



HSIS/HMIS

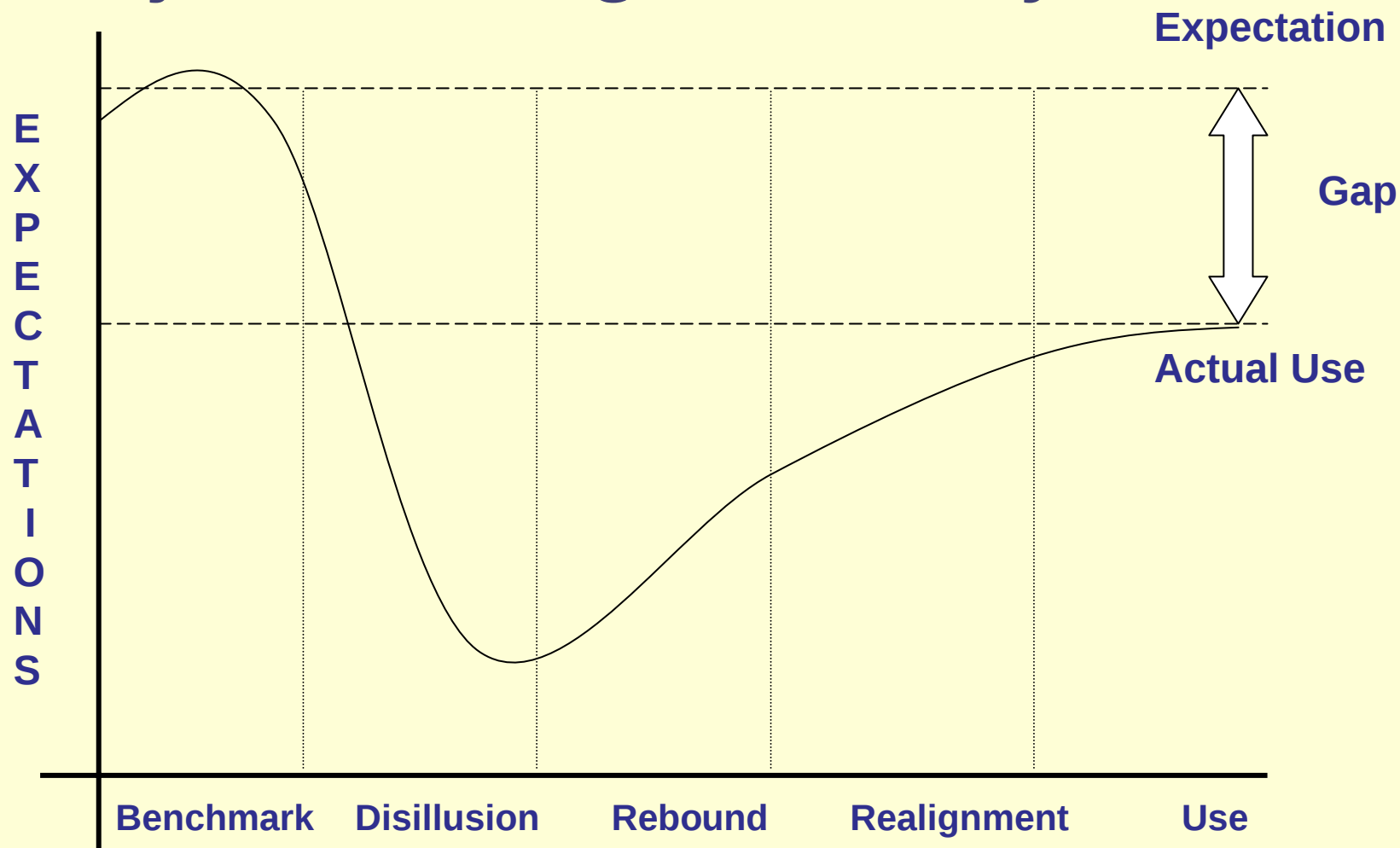


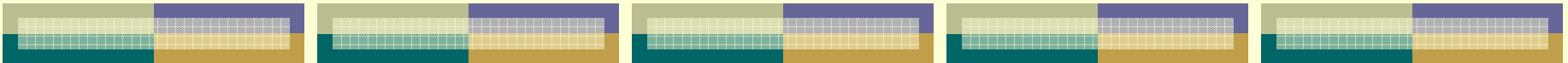


Project Management Cycles

- This refers to the project's “frame of mind.”
- Project Management cycles refer to the natural ups and downs that occur during a project's life cycle.
- These ups and downs can be short lived or longstanding.

Project Management Cycle





Tactics for Managing Expectations

- Document and communicate change.
- Be thorough when explaining what will happen.
- Document progress however small.
- Clarify overstated promises of functionality that take place in public forums.
- Never hide the “queue” for services, activities and deliverables.
- Establish clear-open channels of communication.
- Celebrate accomplishments.

A Strategy to Deal with Derailing Events in HMIS Implementation

Balancing



Monitoring and informing



Aligning actions

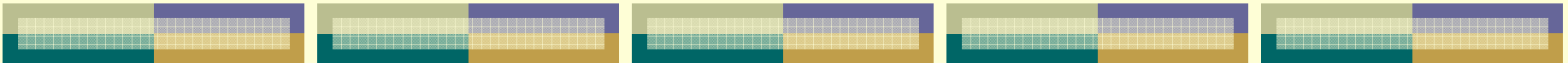


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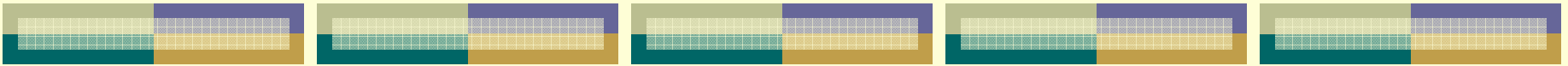
A Strategy to Deal with Derailing Events in HMIS Implementation

- Apply the following project management tactics:
 - Undertake balancing actions to address conflicting goals or derailing actions
 - Establish an effective monitoring and informing program
 - Recognize the need for and engage in realignment activities
 - Connect people to the project



Balancing

- Balancing means bringing the project to a point where there is clear understanding by the parties involved of the rationale for specific project management actions.
- These actions are normally not part of the project plan.



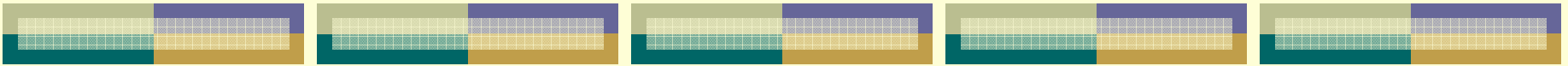
Monitoring and Informing

- This implies a commitment to an ongoing self imposed evaluation program with the dual purpose of:
 - Providing a formal mechanism by which stakeholders are informed of current developments,
 - Ensuring that sporadic or previously unplanned activities are properly incorporated in the plan or eliminated if no longer needed.



Aligning Actions

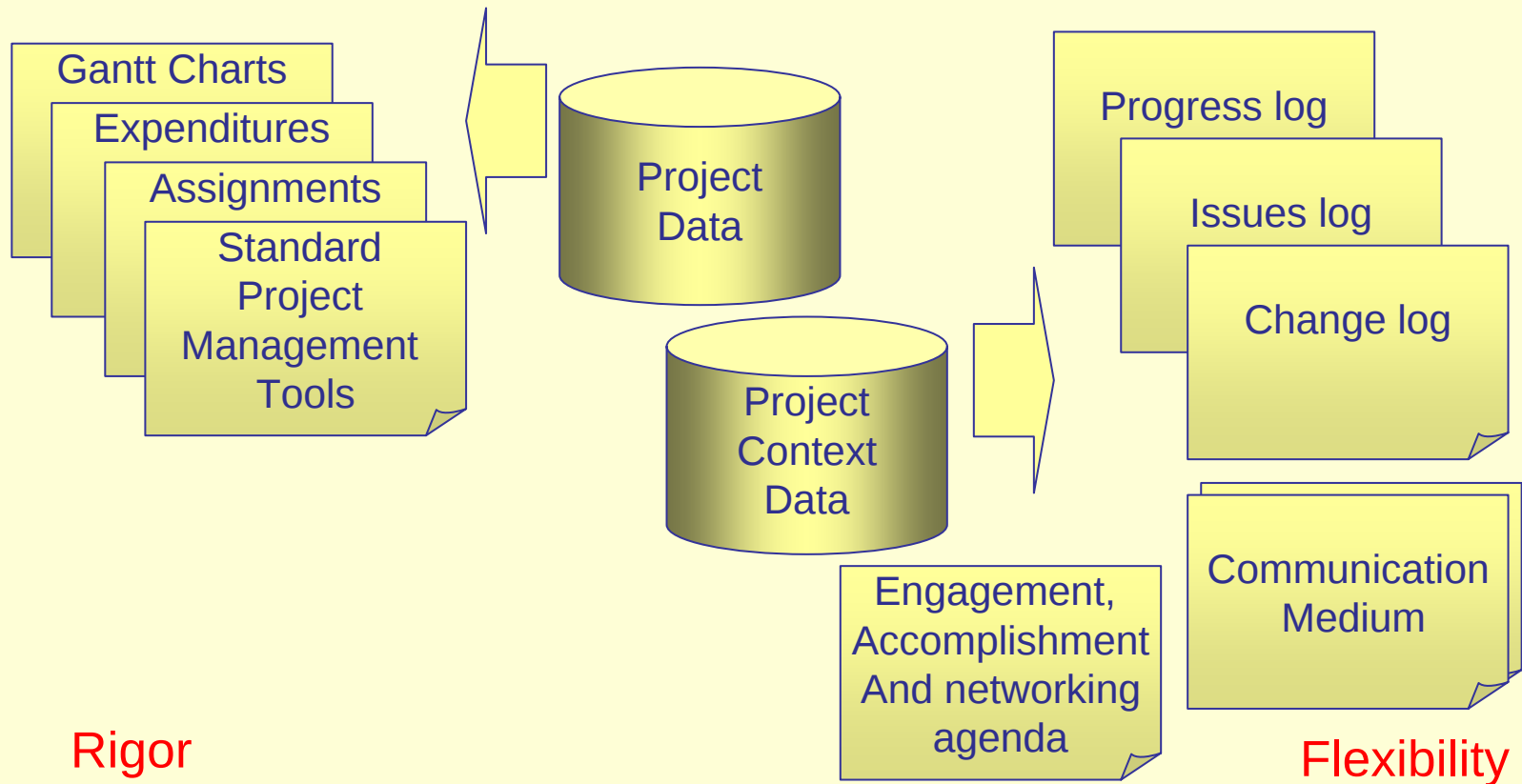
- The best way to describe it is: “damage control.”
- The necessary steps to put the project back on track.



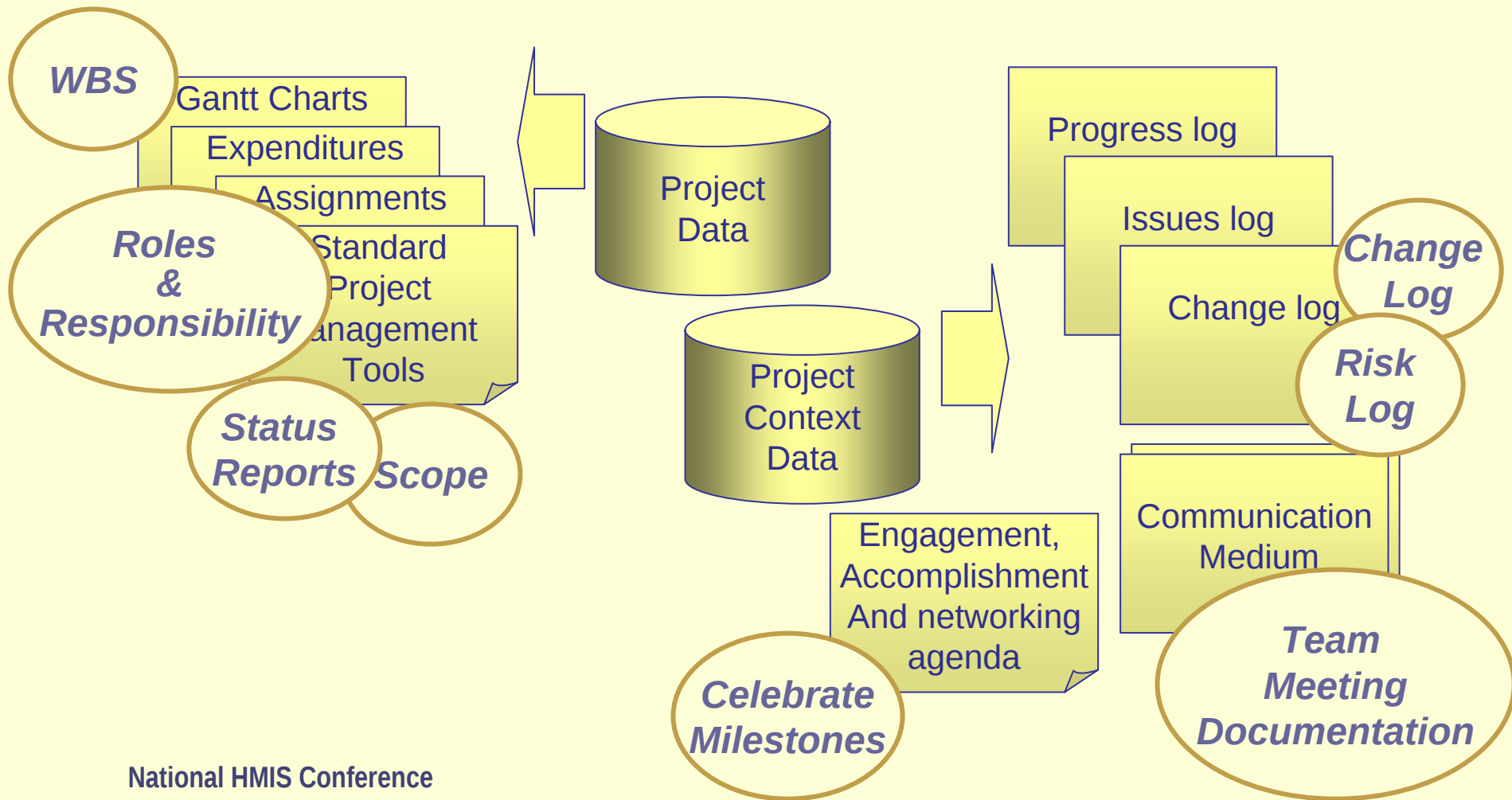
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- The need to create and maintain a ‘sense of community’ in times of turbulence.
- Connecting people to the project by:
 - The attempts the project manager has to make to continuously achieve a mutual clarification of misunderstandings.
 - Recruitment, that is, the attempts the project manager has to make to achieve people’s participation beyond the level of obligation.

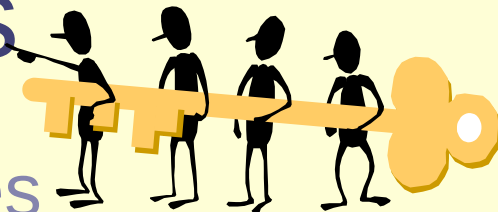
Technology for Supporting Effective Project Management



Project Manager Toolkit



Roles & Responsibilities



- Define team member responsibilities
- Does 'in-kind' staff mean 'working staff' or 'gentle, very nice, seldom there' staff?
 - Define time dedicated to project in terms of hours per *xx (day, week or month)*
 - Develop formal Contract or Statement of Work
 - Track the work accomplished and the time expended
- Define escalation path before you need it!
 - What to do when we agree to disagree?

Work Break-down Structure

● Measuring Progress

- Publish individual work list to team members on a weekly basis
- Time reporting weekly

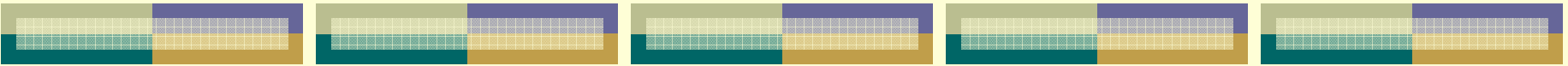
● Monitor

- Work completed
- Schedule completed
- Budget expended
- Keep all 3 in harmony

● Report variances monthly

- Define variance level requiring reporting
- Safe Harbors uses 10% variance





Scope

- Define what is to be accomplished and when
- Scope should include:
 - Objectives to be met
 - Type and number of agencies to be served
 - Feature & Functionality to be delivered
- What is 'out of scope'?
 - This helps identify the 'sacred cows' in an organization
 - Often provokes the most animated, heated discussions

Project Management Time Savers

● Use consistent format for documents

- Agenda – sets meeting expectations and allow for prep work
- Meeting Notes –
 - Agenda creates template for meeting notes
 - Establishes who, what, when and assigned action steps for follow-up
- Why I dislike this presentation format/style



● Consistent meeting dates, times and locations

● Steal from anyone who has gone before you

Agenda Meeting Notes

DATE:	April 7, 2004
TIME:	9:00 – 11:00
LOCATION:	Exchange Building
OBJECTIVES:	Update State Collaboration & Assign Work Effort Tasks

ATTENDEES	Bill Goldsmith	Steve Coretti	Judyann Morgan	Alan Painter
	Gwen Whipple	Janice Hougen	Shane Hendrix	
REGRETS	Marlo Klein	Lauren O'Brien	Jeff Gustafson	

	AGENDA	PERSON	TIME
1.	Agenda review –	Gwen	2 min
2.	Executive Committee Mtg Review	Steve	45 min
3.	Progress Update on State Collaboration—Meeting with CTED	Alan	20 min
4.	Progress Update on Snohomish Involvement	Gwen	10 min
5.			
6.	Review Action Items (old and new)	All	5 min

EXISTING ACTION ITEMS	PERSON	DUE
1. Create a Change order for the Start Up Scope to reflect no Aggregate	Judyann	4/5/04
2. Create a Help Desk script	Gwen	4/1/04
ATTACHMENTS	AUTHOR	ACTION
Executive Committee Meeting Notes	Judyann	FYI
State Collaboration Work Efforts To Be Assigned	Judyann	Team Action

Date:	April 7, 2004		
Objective:	Update State Collaboration & Assign Work Effort Tasks		
Attendees:	Bill Goldsmith	Gwen Whipple	Janice Hougen
	Stephen Coretti	Alan Painter	Judyann Morgan
Regrets:	Marlo Klein	Jeff Gustafson	Lauren O'Brien
	Shane Hendrix		

DISCUSSION POINTS	
1.	EXECUTIVE COMMITTEE MTG REVIEW Kirk Bailey, Chief Security Officer City of Seattle, brought a cybercrime subject matter expert to the meeting. Kirk is very supportive of the work the team has done to mitigate and control the security risks. The EC approved the Security Policy. The EC will meet twice a month for the next two months.
2.	PROGRESS UPDATE ON STATE COLLABORATION — MEETING WITH CTED 4.2.04 Judyann, Alan and Carolyn attended a meeting with CTED. This is the first time a proposal has been brought to them from outside the department. Judyann will be preparing an Opportunity Identification Document. A Project Plan and budget will also be required in the future.
3.	PROGRESS UPDATE ON SNOHOMISH INVOLVEMENT Janice will initiate a conversation with Carolyn about transferring or combining HUD HMIS funding as we move toward future collaboration.

EXISTING ACTION ITEMS	PERSON	DUE
1. Create a Change order for the Start Up Scope to reflect no Aggregate	Judyann	4/5/04
2. Create a Help Desk script	Gwen	4/1/04
NEW ACTION ITEMS	PERSON	DUE
1. Meet with Patrick regarding staffing, ownership issues before next EC meeting	Janice & Bill	April 5
2. Resolve DIS invoice issue	Judyann	April 5
3. Follow up on issues regarding future marketing of Safe Harbors software in light of government subsidy regulations	Judyann	April 15
4. Send wording included in both Agency Partner Agreement and Client Data Use Notification regarding legal uses of data so that can be included in Data Policy	Gwen	April 2
5. Make changes to Data Policy for EC meeting	Bill/Janice	April 5

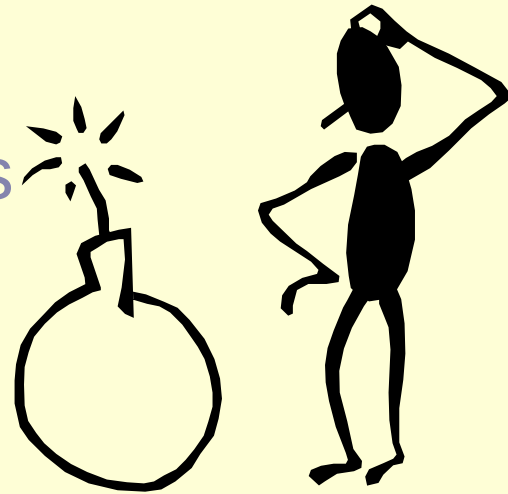
Change Management

- Define how changes to the plan and scope will be managed
 - Keep a Change Log
 - How will change be communicated?
 - What are the impacts of the change?
 - Cost - Budget
 - Time - Schedule
 - Roles - Team
 - Who approves the change?



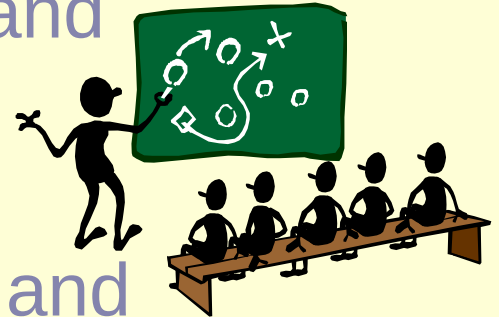
Risk Management

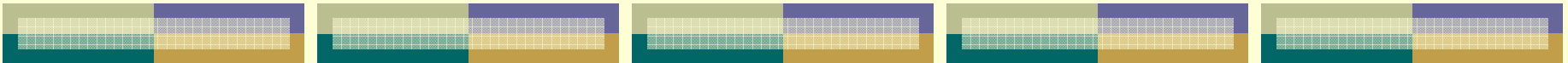
- Formal team review to identify risks
 - Project schedule
 - Vendor plan
 - Agency/Program participation, etc.,
- Establish mitigation strategy and contingency plans for 'high' risks
- Educate organization on Risk Management value
 - Create culture where identifying risks is a 'good thing'



Safe Harbors Lessons Learned

- Use strong Project Management
- Gain buy in from stakeholders
- Play to people's strengths on project team
- Use a Pilot Phase to test yourself and validate your planning
- Be consistent in communications
- Security can be more complicated and expensive than originally planned
- Start Up taught us that there is a range in agency technical infrastructure





Safe Harbors New Opportunities

● Open Source Software Application

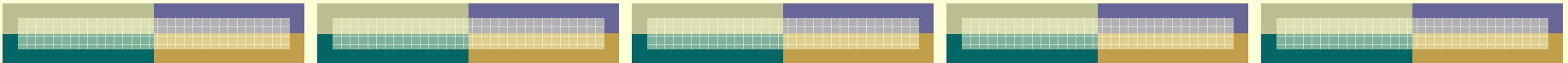
- Allows more collaboration
- Reduces application costs

● Collaboration to create statewide system

- Just beginning the investigation of the opportunity
- Early investigation shows significant economies of scale
- Balance of 'control' vs. the cost savings realized by statewide collaboration







Contracts and Agreements

- Never start from a blank page when you can steal from others ***or . . .***
- Leverage what others have developed
- Examples exist on many websites
 - www.safeharbors.org
 - www.hmis-cincinnati.org
 - www.wilder.org/research/projects/hmis
 - www.chicagocontinuum.org
 - www.masw.org
 - www.symmetricolutions.com
 - www.mccormack.umb.edu



What are your questions?