



Achieving a Quality and Stable HMIS Staffing Pattern

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Learning Objectives

- Identify questions to guide appropriate HMIS Lead staffing based on CoC size and need
- Summarize knowledge, skills, and abilities necessary to manage and operate an effective HMIS implementation including roles and responsibilities
- Identify where funding opportunities may be available to support a functioning HMIS team
- Identify ways to invest in the professional development of your team
- Learn from community partners about best practices to develop an HMIS Lead team



Characteristics of a Strong HMIS Lead

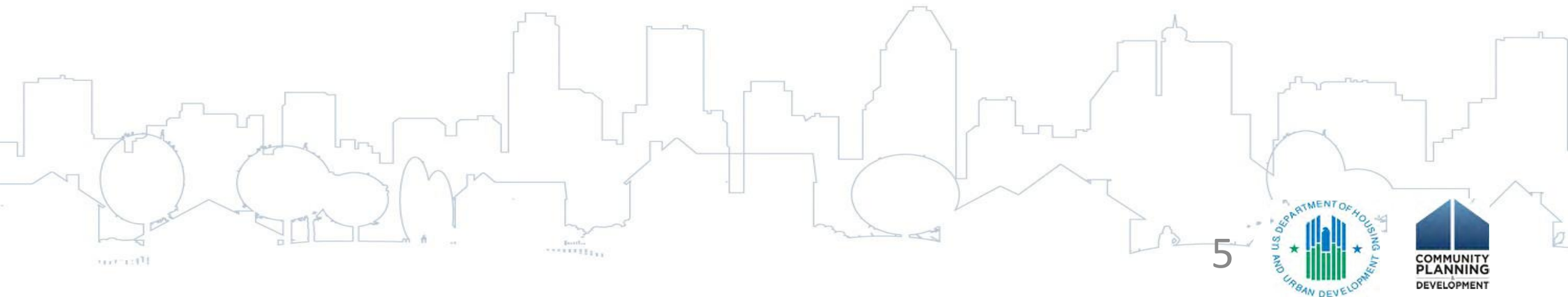
- Trusted by CoCs to manage HMIS vendor relationships
- Supported by CoC and the CoC's Data Committee
- Enables a CoC-wide culture of performance
- Enhances data literacy and data-driven planning
- Demonstrates technical proficiency and policy expertise
- Outcomes-driven and transparent
- Implements feedback loops to improve performance

Guiding Questions

Identify guiding questions to develop an appropriate HMIS Lead staffing model:

- **What** is the vision and goal for HMIS in your community?
- **How** are you building a culture to support the vision?
- **Who** do you have in positions to move the vision forward?
- **When** should we assess the expectations of the HMIS Lead?
- **Where** does the funding and resources to make progress come from?

Defining Your HMIS Vision



Vision

Strategy

Funding

Execution

Vision as “The What”

What role does HMIS play in your community?

- Is there a common vision, goal or understanding of HMIS?
- CoC and HMIS leadership should jointly and clearly articulate the vision for HMIS and how the Lead will achieve it. Lead staff need to understand how their contribution fits into the bigger picture.
- Important to find ways to infuse this sense of purpose on an ongoing basis for the continued growth of the team.
- Consider both intrinsic and extrinsic motivators

Vision as “The What”

What are the expectations of the HMIS Lead Agency?

- 1) Identify how the HMIS is currently being used in your community:
 - State/local reporting
 - Data matching
 - Funding opportunities
- 2) Do the expectations of HMIS align with the CoC's vision of HMIS?
 - Clearly define vision and goals of data as a tool to help end homelessness
 - Set expectations for the HMIS Lead to meet
 - Allow room for transparent assessment of matching needs and expectations with resources and strategy

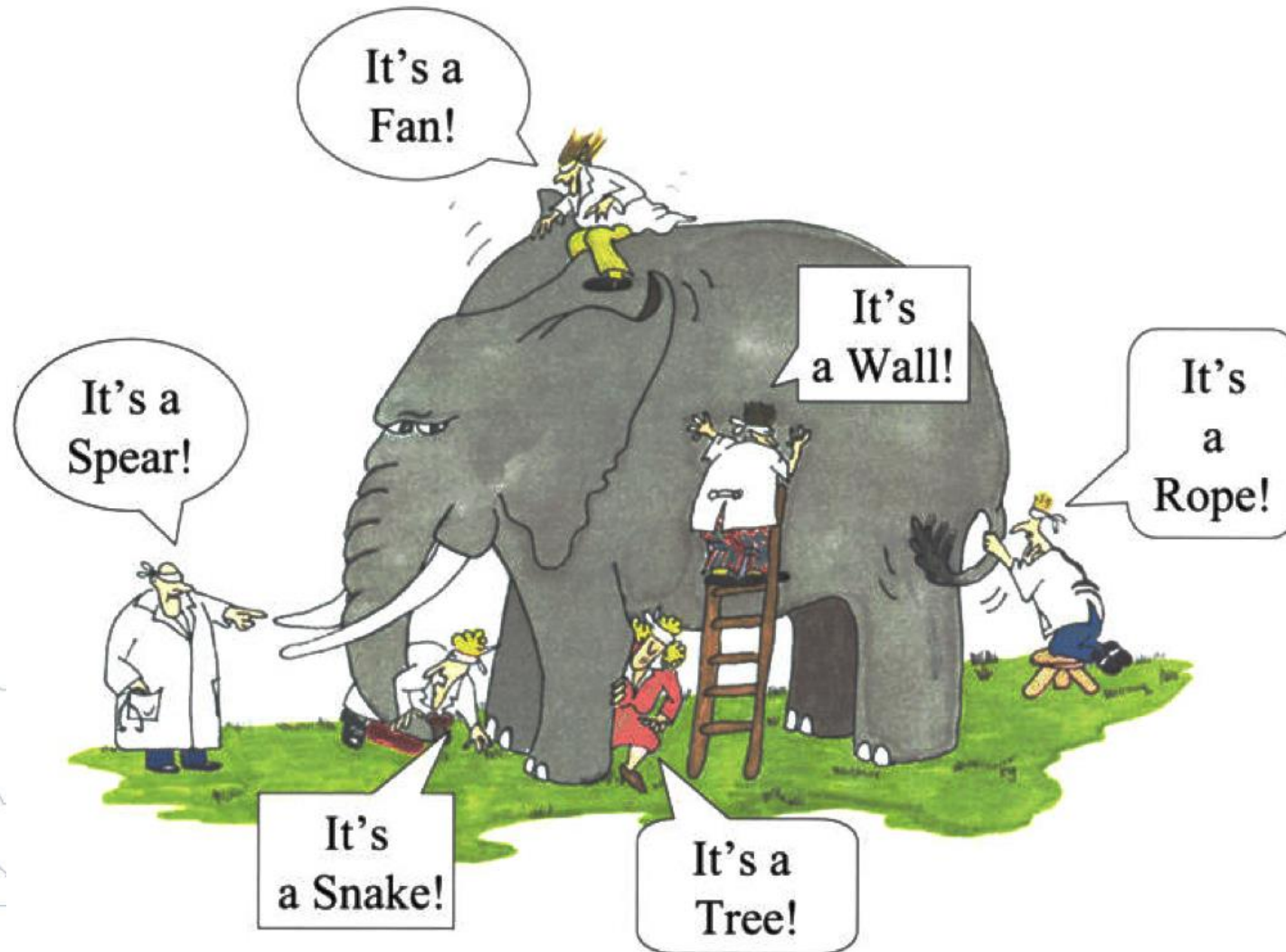
Vision as “The What”

What are the expectations of your HMIS Lead Staff?

Key responsibilities of the HMIS Lead staff include many different activities, including:

- Policy and Planning
- System Administration
- Reporting and Analysis
- Monitoring and Evaluation
- Training and Technical Support
- Coordinated Entry Support
- Communication and Capacity Building

Every system is perfectly designed to get the results it gets.



Community Listening Session on Data

www.mdhi.org/clsd_brief

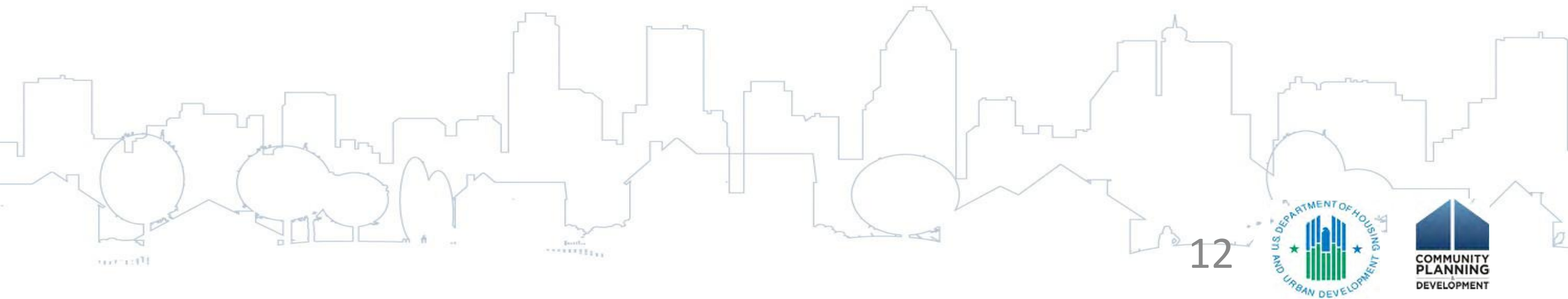
Person Centered (What do _____ need from a data system?)

People Experiencing Homelessness
Frontline Staff
Managers
Decision-Makers

Data Driven (+/-)

Future-Pacing

6 months, In 2019 and By 2022



Strategy as “The How”

How do you align HMIS resources with the CoC's vision for data?

Begin by asking yourself the following questions:

How do I know if I...

- 1) Understand the CoC's vision for data?
- 2) Have the right resources to support the vision?
- 3) Am developing the right skills across the HMIS Lead team?
- 4) Am aligning staffing models and competencies with the CoC's needs?

Assess Your System to Identify Staffing Needs

Consider whether your HMIS implementation is growing and expanding

- Increased agency participation in HMIS
- Increase in request for user licensees
- Increase in projects within HMIS
- Increase in end users

Budgeting for future growth and expansion

- Importance of a forward-thinking approach when creating a budget
- Diversify funding sources to align with projected system growth
- Create a strategic plan that accounts for the demand of increased system usage

Assess Your System to Identify Staffing Needs

The CoC and HMIS Lead should regularly assess:

- The number of HMIS Lead staff
 - Consider staffing ratio to HMIS end users
 - Consider system administration roles and responsibilities across all stakeholders
- The focus areas and skill sets of HMIS Lead staff
 - Coordinated entry
 - Custom reports
 - Data quality
 - Data matching
 - New initiatives (YHDP, Pay for Success, etc.)

1-2-4 Break Out Discussion

On your own: Take 1 minute and write down an answer to the question

“What is the vision for HMIS and data in your community?”

1-2-4 Break Out Discussion

With a partner: Take 2 minutes and discuss with your partner your community's vision for HMIS and data, and answer the question

“What is the biggest need or gap to achieving this vision?”

1-2-4 Break Out Discussion

With another pair: Take 4 minutes and report out on steps 1 and 2, and then answer the question

“What is a practical strategy for meeting the need or closing the gap to improve your CoC’s HMIS implementation?”

People and Organizations as “The Who”

Who is moving the HMIS vision forward?

Continuum of Care

HMIS Lead Agency

CoC
Governance

HMIS Vendor

HMIS End Users

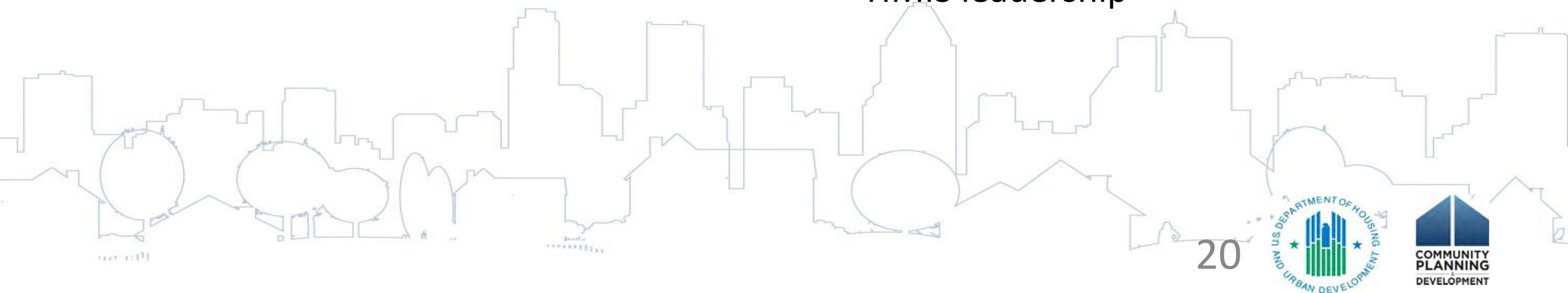
Contributory HMIS
Organizations
(CHOs)

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HMIS Lead Roles and Responsibilities

- Policy and Planning → Project Manager
- System Administration → System Administrator
- Reporting and Analysis → Reports Writer and/or Data Analyst
- Monitoring and Evaluation → Shared across CoC and HMIS leadership
- Training and Technical Support → Technical Trainer and Help Desk Staff
- Coordinated Entry Support → Shared across CoC and HMIS leadership
- Communication and Capacity Building → Project Manager and shared CoC and HMIS leadership



Identify Ideal Skill Sets

HMIS Technical Staff

- Customer support experience
- Written and oral communication skills
- Technical knowledge and experience
- Task efficiency
- Understanding of CoC programs and projects
- Skills supporting a culture of teamwork

ALSO: Strong policy orientation and working knowledge of HUD's definition of homelessness.

Identify Ideal Skill Sets

Analysis/Reporting Staff

- Logical, problem solving skills
- Ability to analyze large data sets
- Ability to query data using SQL and other analysis tools, such as Excel or SPSS
- Understanding of HUD programming and reporting specifications
- Ability to assess data assumptions and vendor report parameters

ALSO: Strong policy orientation and working knowledge of HUD's definition of Homelessness.

Hiring

Traits

Dynamic
Patient
Approachable
Organized
Committed
Savvy

Proficiencies

SQL, Java, Coding
SCRUM, Agile Methodology
FreshDesk, ZenDesk, Zoho
HUD-speak
GIS, Tableau, PowerBI
Jira, Slack, Asana

Titles

Data Analyst
Project Manager
Tier 1, Tier 2 Customer Support
Research Analyst
Account Manager
Quality Assurance Manager
Technical Trainer

Policy: An Often-Overlooked Skill

HMIS Lead roles and responsibilities are about 50% policy and 50% technical

Job descriptions and staffing plans weighted too heavily one way or the other will leave gaps in local HMIS leadership and capacity

Policy oriented skills:

- ✓ Knowledge of Federal strategic initiatives to prevent and end homelessness
- ✓ Working knowledge of HUD's 4 categories of homelessness, as well as the chronic homeless definition
- ✓ Familiarity with federal, state, and local privacy statutes and regulations

Lead Staffing and “When” to Adapt

- Smaller HMIS implementations with few users to support, one or more of these functions may be combined in the same staff role
- Will need to have a multitude of relevant skills
- Larger HMIS implementations should ensure adequate staffing to cover the distinct task and time requirements of the multiple staffing roles needed to achieve CoC goals
- Must objectively consider level of commitment needed to avoid staff burnout and turnover

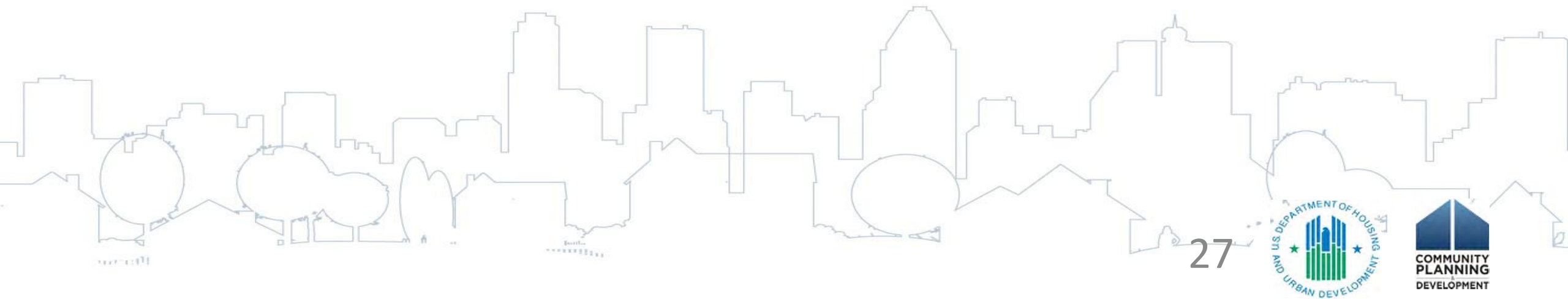
Poll the Audience!

Which of the following areas need immediate action in order to build a stronger HMIS Lead?

- A) Establish clearer roles and responsibilities
- B) Hire more staff
- C) Define our HMIS vision
- D) Use current staff more efficiently

Go to www.menti.com and use the code **83 83 09**





Economic\$

- Budget review (100% HUD HMIS funding? Shared? CES support?)
- Competing with for-profit entities, mix business and non-profit backgrounds
 - Salary
 - Job Descriptions
- Staff: More isn't better, better is better
- Customer Support Portal assists end users to answer their own questions
- Economies of scale
 - Sharing Tier 1, trainer, customer support portal costs
 - Contract for technically specific priorities like advanced dashboards, integration, GIS ([upwork.com](https://www.upwork.com))
 - Leverage your local & State government friends

“Where” You Can Identify Resources

Federal Funding Sources

- HUD CoC and ESG Program funding for HMIS components
- HOPWA, CDBG, CSBG
- Other Federal Funds apart from HUD: HHS, VA, etc., for HMIS participation and/or user fees

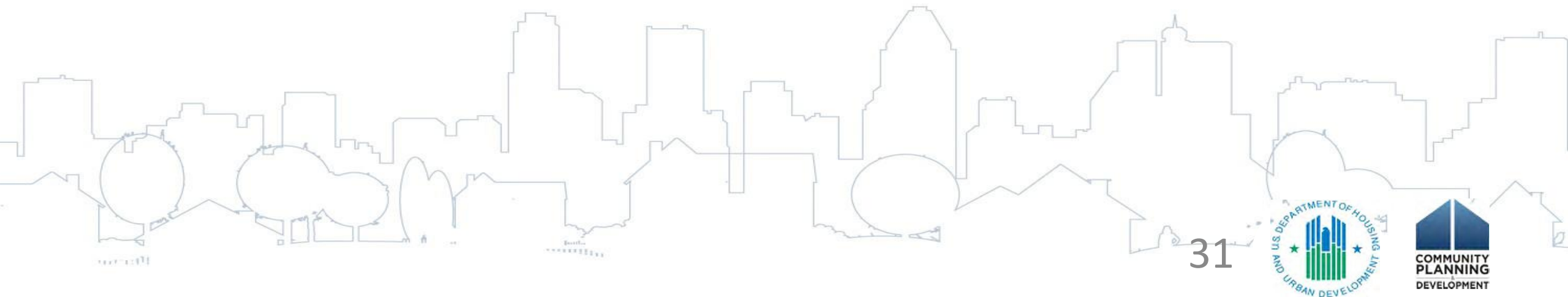
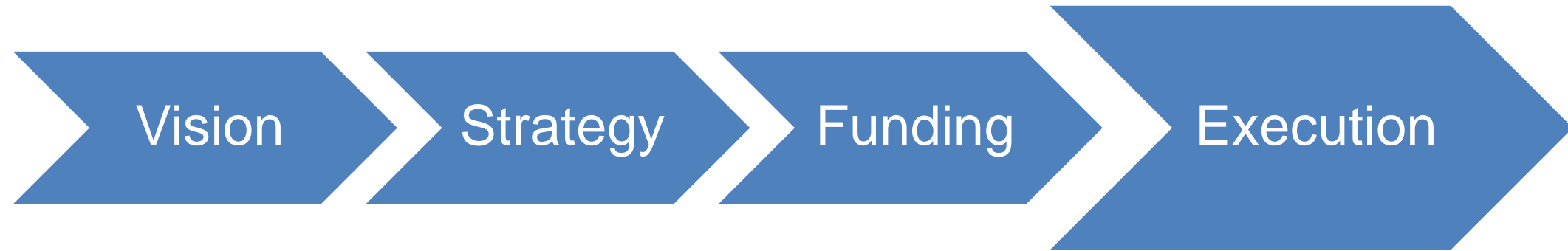
State and Local Government Funds

Private Foundations

“Where” You Can Identify Resources

Other Funding Strategies

- **Cost Sharing**
 - Agency participation and/or user fees to cover all or a portion of ongoing operational costs
- **Fee-For-Service**
 - Charging fixed fees for specific services, or variable fee for complex reports
- **Consolidation**
 - Merging and consolidating entire HMIS implementations or specific components (such as training)



Strengthen and Improve Staff Capacity

Create a culture of flexibility yet accountability

- ❑ Be prepared to wear different hats if the needs of your CoC change
- ❑ Cross-train HMIS Lead staff to understand how their position affects the roles of others
- ❑ Clearly communicate roles and responsibilities when expectations change
- ❑ Create a holistic view of how the role of the HMIS Lead works within the greater CoC

Strengthen and Improve as a Team

Schedule regular meetings:

- By developing relationships and getting to know your team members, you will begin to understand their strengths, weaknesses, and skills yet to be developed.
- Take the time to learn how to motivate your team to go beyond what is expected of them

Give proactive, constructive feedback:

- Instead of waiting until a problem occurs and then giving feedback, develop a habit of regularly letting your team members know how they are doing and what areas they could improve

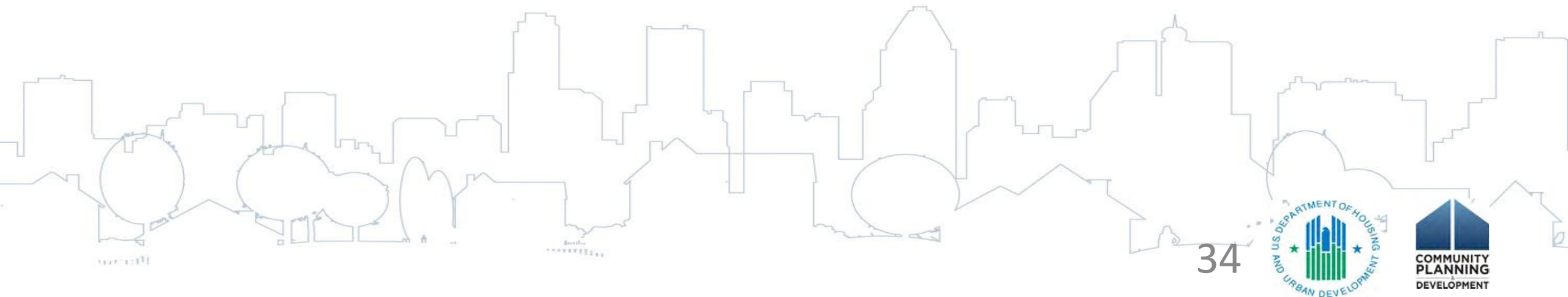
Ensure supervision is prioritized and consistent:

- Take time to listen and provide guidance to your staff. Consistency communicates that your team is valued and heard, creating a trusting space to work through issues as they arise.

Team Management

1. Daily Stand-Up
2. Check-In + Supervision
3. Bi-Weekly Staff Meetings
4. Monthly Ad Hoc
5. Annual Performance Review

1. Team, 5 minutes
2. Individual, 30 minutes
3. Team, 2 hours
4. Team, 4 hours
5. Individual, 1-2 hours



Staff Learning Opportunities

How People Learn Effectively

70% on the job

- Day-to-day improvements
- Areas of innovation

20% relationships and networking

- Interactions with peers
- Manager coaching and performance feedback

10% formal training programs

Strengthen and Improve

Encourage Professional Development

- Promote a culture of learning and skill development by providing access to ongoing training and personal development.
- Encouraging ongoing learning and goal achievement will help to prevent team members from becoming complacent or bored in their positions.
 - Attend data conferences (Tableau, Looker, vendor-hosted, NHSDC)
 - Attend trainings and workshops
 - Publish articles, blogs, white papers, etc.
 - Support continuing education opportunities
 - Analytics courses at local colleges and universities, online programs
 - Encourage attending CoC Board meetings

Subject Matter Expertise

- CoC Operations: Point in Time, CoC Program competition/NOFA
- System Improvement: Coordinated Entry, Data Quality
- HUD Reports: APR, LSA/AHAR, CAPER, SSVF and other federal partner report uploads
- Federal Partner Support: CoC, ESG, HOPWA, RHY, PATH, VA
- Project and Program Knowledge: ES, TH, RRH, PSH, OPH, SH, SSO, SO
- Customer Service: Help Desk portal, ad hoc report requests

Key Takeaways

- Non-technical people are working in a technical system
- Shift from 'how' to 'why'?
- Qualitative data is as important as quantitative data
- Poach agency liaisons, super end users, NHSDC attendees
- Data destroys anecdotes

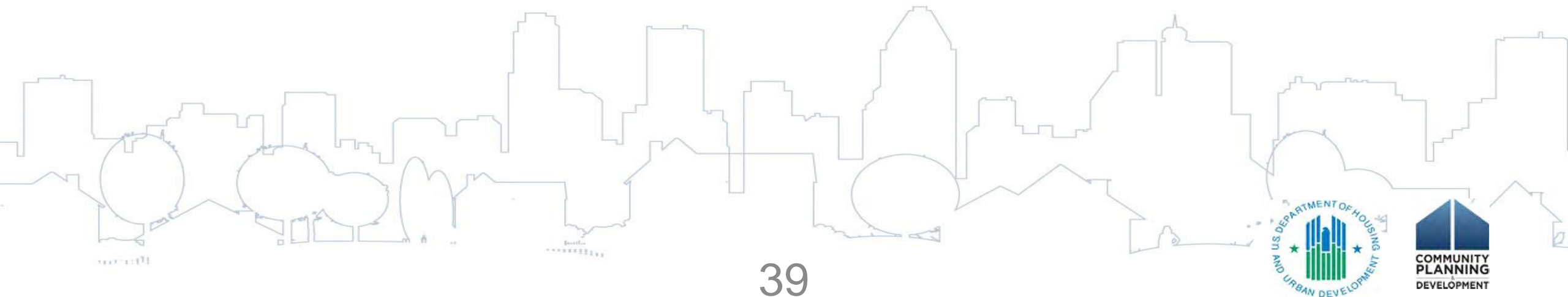


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Thank You

The MDHI Team: Kyla, Matt, Joe, Jas & Stacia

Your Presenters: Ian, Ryan & Leah

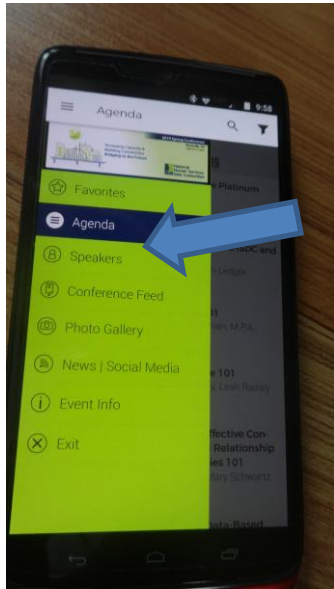


Questions, Comments, and Discussion

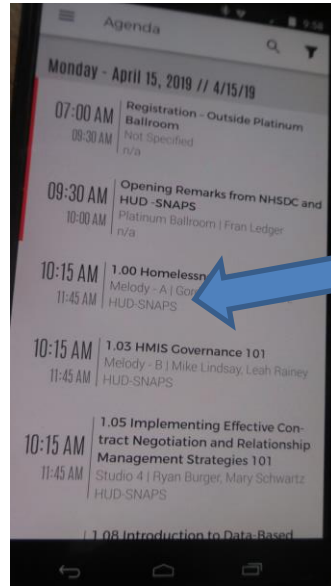
Please take a moment and complete the session evaluation on the NHSDC app!

Evaluate This Session on Your Conference App! (It takes 5 minutes to complete)

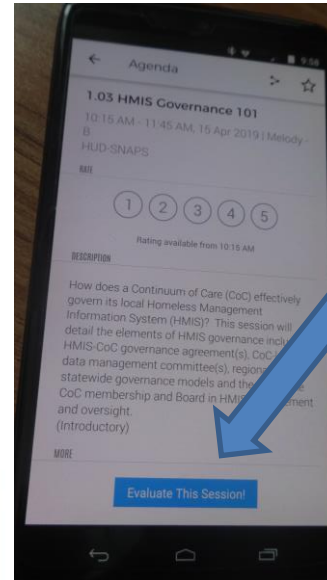
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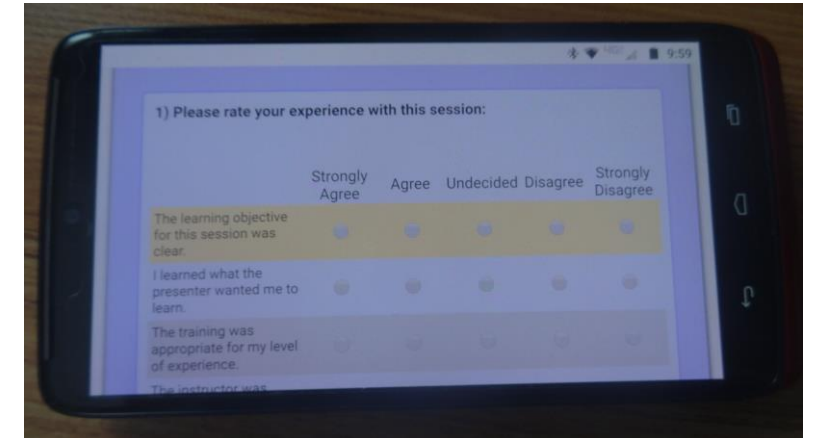
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of the session.



3) Select the blue
“Evaluate This
Session”.



4) Complete the
Evaluation and
Select “Finish”.



TIP:

Turn your phone horizontally to see rating options.

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HUD Certificate-of-Completion

Reminder: HUD is offering a Certificate-of-Completion for completing at least 4 sessions within either track:

- 1) HMIS Fundamentals Track
- 2) System Planning with Data Track

To earn credit for completion of this session, please complete the evaluation on the conference app and include contact details when prompted

HUD Certificate-of-Completion

HMIS Fundamentals Track

- HMIS Governance 101
- HMIS Lead Monitoring
- HMIS Project Monitoring
- Implementing Effective Contract Negotiation and Relationship Management Strategies 101
- HMIS Project Set Up 101
- HMIS Project Set Up 201
- Understanding the Interconnectedness of HMIS Data
- Achieving a Quality and Stable HMIS Staffing Pattern
- HMIS Project Management and Annual Calendar of Expectations

System Planning with Data Track

- Orientation to the Stella Performance Module
- System Modeling 101
- System Performance Improvement: Part 1 – Analyzing Performance
- System Performance Improvement: Part 2 – Developing Strategies
- Overview of System Performance Measures and Reports
- Using Data in Funding Decisions
- System Performance by Subpopulation and Geography