HMIS Project Monitoring

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Alissa Parrish
&
Gordon Sullivan

Who's in the Room?

What type of organization do you represent?

- CoC Lead Organization
- HMIS Lead Organization
- HMIS Software Vendor
- Homeless Service Provider
- Government Organization (local, state, or federal)
- Other Service Provider (healthcare, mental health, etc.)
- Other

Learning Objectives

- Identify the key components of HMIS project monitoring
- Interactive exercise to discuss potential solutions to identified challenges
- What to do when an HMIS project monitoring leads to findings
- Community examples to operationalize HMIS project monitoring

Why is Project Monitoring Important?

HUD SNAPS Data TA Strategy to Improve Data & Performance

- HMIS Project Monitoring related to all 3 strategies
- Monitoring is cited in the CoC Interim Rule to ensure “consistent participation of recipients and subrecipients in the HMIS”
- Project Monitoring is a best practice and can be done in various ways to meet local needs / situations

HUD SNAPS Data TA Strategy

STRATEGY 2:

Data systems collect accurate, comprehensive and timely data

Characteristic: Bed Coverage across Continuum (funded and unfunded)		
Current status (or near-term)	**Majority of CoCs in 3-5 years**	**Advanced CoCs in 3-5 years**
▪ 100% required providers and less than 100% non-required providers contribute to HMIS	▪ 100% all homeless service providers contribute to HMIS	▪ 100% homeless providers and non-homeless service providers contribute to shared data environment
Characteristic: Quality data = Timely Accurate Comprehensive		
Current status (or near-term)	**Majority of CoCs in 3-5 years**	**Advanced CoCs in 3-5 years**
▪ 100% complete ▪ Less than 100% accurate ▪ No timeliness standard	▪ 100% accurate ▪ 100% complete ▪ Projects directly enter data within 2 hours for crisis response and project start/ project exit ▪ PSH projects directly enter data within 24 hours	▪ 100% accurate ▪ Customized local data elements are limited to information needed to report, serve and house clients. ▪ 100% complete ▪ Timeliness meets Coordinated Entry placement and referral needs

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COMMUNITY PLANNING DEVELOPMENT

CoC Interim Rule

CoC Interim Rule

Designating and operating an HMIS

"The Continuum of Care is responsible for designating an HMIS and an eligible applicant to manage the HMIS, consistent with the requirements, which will be codified in 24 CFR part 580. This duty is listed under section 402(f)(2) of the McKinney-Vento Act. In addition, the Continuum is responsible for reviewing, revising, and approving a privacy plan, security plan, and data quality plan for the HMIS and ***ensuring consistent participation of recipients and subrecipients in the HMIS.***"

Question

Is your community currently conducting HMIS Project Monitoring?

- Yes, and it's perfect
- Yes, and we need assistance in making it better
- No, and we need assistance in starting the process
- No, and we don't want to
- Other?

Poll Question

www.menti.com (use code 91 42 04)

What words come to your mind when you think of HMIS Project Monitoring?

Word cloud! Be creative and submit up to 10 words!

Poll Question

Go to **www.menti.com** and use the code **99 64 97**

Mentimeter

What words come to your mind when you think of HMIS Project Monitoring?

59

Meet some new people!

Small Groups

Get together with ***PEOPLE YOU DON'T KNOW***

Two specific questions to talk out:

- What do you think are the key components of HMIS project monitoring?
- How do you currently conduct HMIS project monitoring?

Bring It Back

Who wants to share?

- What do you think are the key components of project monitoring?
- How do you currently conduct project monitoring?

HMIS Project Monitoring

Discussion

If you are currently conducting HMIS Project Monitoring within your community, which entity(ies) is involved in the process?

- CoC Lead
- HMIS Lead
- Participating homeless services provider
- Local funder
- Other HMIS stakeholder
- Other CoC stakeholder

Discussion

Which project type(s) do you currently monitor?

- CoC-funded projects
- ESG-funded projects
- Federal partner-funded projects (PATH, SSVF, RHY, etc.)
- Locally-funded projects
- Specific project types only (Coordinated Entry, Emergency Shelter, Permanent Supportive Housing, etc.)
- All projects entering data into HMIS

Who is involved with Project Monitoring?

Which entities should be monitored?

Any project using HMIS, regardless of funding received (or not)

Who should be involved in HMIS Project Monitoring?

Participating organization, HMIS Lead, CoC, local funders

What level of involvement do the entities play?

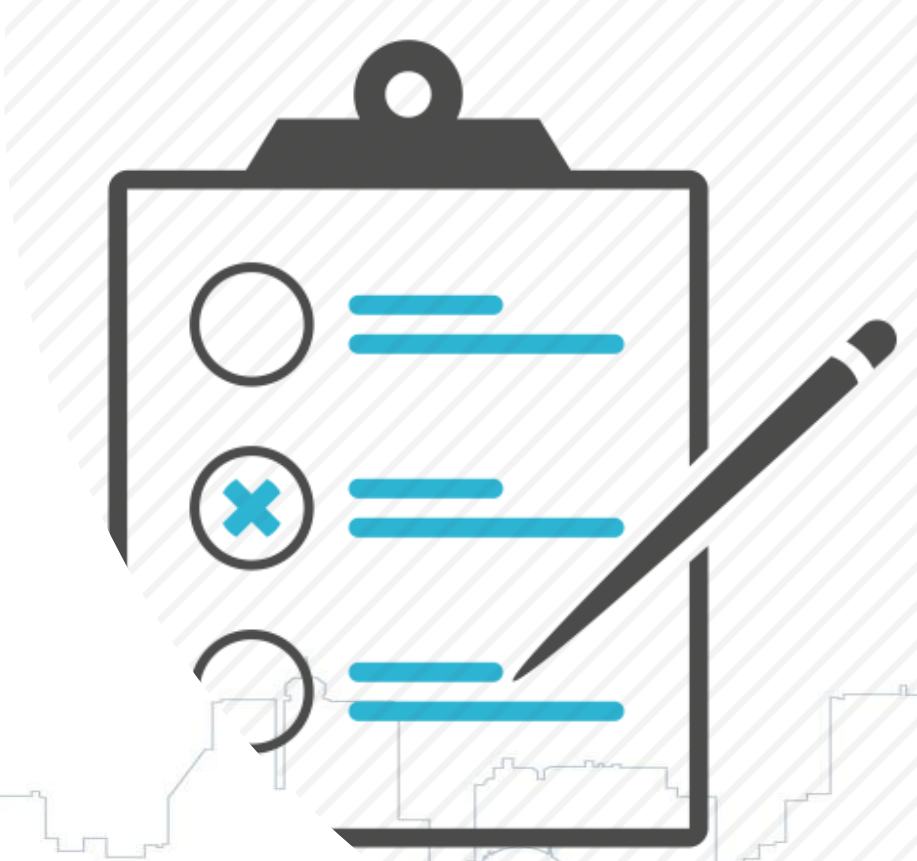
Level of communication – both the good and the not so good

Who / which specific staff should be present?

Management, case managers, data entry staff

What are the key components to Project Monitoring?

- What is included in an HMIS Project Monitoring visit?
- What should be reviewed and why?
  - HMIS Project Monitoring Visit Report example
  - Use a checklist based on earlier discussion



Dense or Large?

Are you part of a very dense CoC (think Boise, ID) or a very large CoC (think Balance of State, AK) geographically?

- Dense
- Large

Where should Project Monitoring take place?

- Onsite or remote?
  - Does it have to be either / or?
    - Can include both components
    - Frequency of monitoring
  - What makes sense geographically and for the specific system / implementation?
  - What limitations do you currently have? How can you overcome them?

Poll Question

www.menti.com (use code 91 42 04)

How often do you conduct HMIS Project Monitoring?

- Every 6 months
- Annually
- Sporadically
- During specific periods of time (grant starts, grant closing, etc.)
- We don't monitor
- Other

Poll Question

Go to **www.menti.com** and use the code **99 64 97**

Mentimeter

How often do you conduct HMIS Project Monitoring?

40

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When should Project Monitoring Occur?

How often should HMIS project monitoring occur?

- At least annually
- More often?
- Upon the closing out of a project / grant
- Within a certain time period of a new project / grant?

How?

- Use HMIS Policies & Procedures, Privacy Policy, and Security Policy as a backbone
- Clear and transparent about how organizations / projects will be monitored
- Use baseline data quality thresholds per your Data Quality Management Plan as guidelines

What happens after Project Monitoring?

- What do you do with the results of an HMIS project monitoring visit?

  - Follow-up with action steps and timeline
  - Name out who is responsible for what
  - Data Quality Improvement Plan, if needed
  - What entities are included in that communication?
  - Acknowledge both the good and the not so good
  - Who is informed about the results of monitoring?

Strategies

HMIS Project Monitoring Strategies

- All in one
- Specifying what is most important to do onsite vs. remote
- Write it out – everything (clear and transparent)
  - Send checklist to organizations ahead of time
- Actionable and measurable steps if there are findings
- Acknowledge the good

TRUST

Examples

Best Practices from Communities

- Ability to do all onsite monitoring in a week's time
- Provide checklist of monitoring items prior to visit to all organizations
- Communicate results to CoC

Best Practices from Communities

- Include ESG and / or CoC monitoring with HMIS monitoring
- Collaborate with state / local funders and their monitoring practices
- Expectations clear and transparent
- Address findings in follow-up and provide solutions

Other Things to Consider

- Privacy Policy specifics
- Local funder requirements
- Nuanced workflows / HMIS data collection
- DQMP baseline requirements by project type
- CoC buy-in / ability to incentivize / enforce
- Who is informed of monitoring results
- If annual monitoring for every organization is not feasible, use past monitoring results to determine risk and frequency of monitoring

Conclusion

Discussion

Tell us one thing you took away from this session that you will implement in your HMIS project monitoring when you go back to your community

Q&A

HUD Certificate-of-Completion

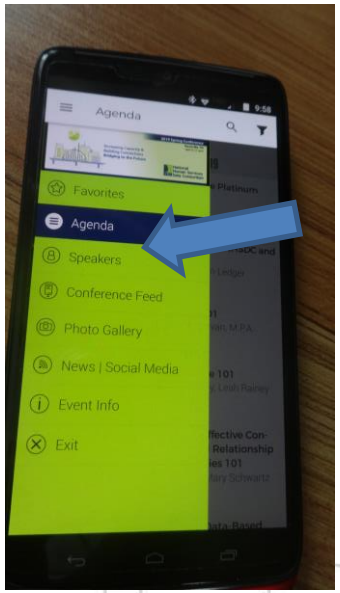
Reminder: HUD is offering a Certificate-of-Completion for completing at least 4 sessions within either track:

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

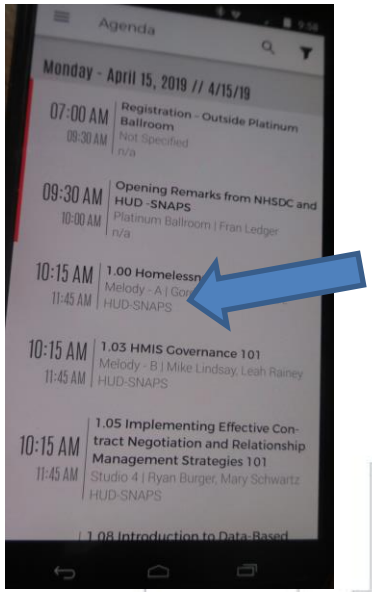
To earn credit for completion of this session, please complete the evaluation on the conference app and include contact details when prompted

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

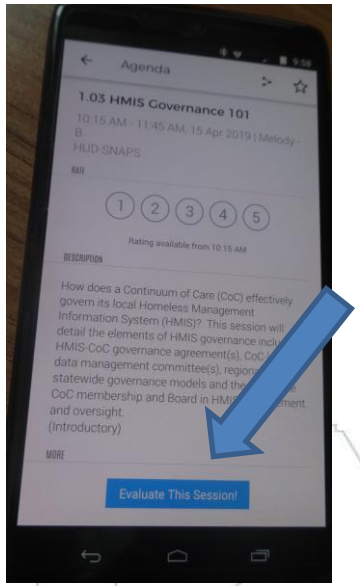
1) Select “Agenda” from the navigation menu.



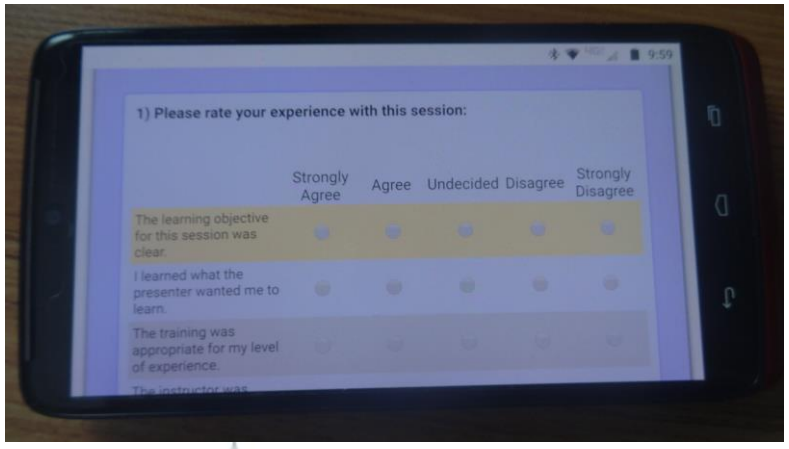
2) Select the name of the session.



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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Thank you!

Gordon Sullivan

Collaborative Solutions

Gordon@collaborative-solutions.net

Alissa Parrish

ICF / ICA

alissa.parrish@icalliances.org