

A CONTINUUM OF CARE PLANNING TOOL

**Homeless Management Information System (HMIS)
Planning, Selection & Implementation**

Needs Analysis

This document is intended for the use of Continuum of Care organizations to assist in understanding their needs for the Planning, Selection, and Implementation of a local, regional, or statewide Homeless Management Information System (HMIS).

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HMIS Consultants



HMIS Planning

Task	Status	Importance	Assignment
1. Community Assessment Conducting an assessment of the community's readiness and ability to undertake a HMIS implementation.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
2. Vision & Goal Definition Developing a common vision and goals of the HMIS implementation and achieving buy-in from the Continuum and all providers.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
3. Project Organization Developing an organization including all appropriate stakeholders to lead the HMIS planning, selection, and implementation efforts.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
4. Group Facilitation Scheduling, organizing, facilitating, and documenting meetings of groups involved in HMIS planning, selection, and implementation.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
5. Budget Development & Analysis Developing detailed budgets and financial analysis for reporting to HUD and for project control.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
6. HUD Technical Submission Documenting the necessary requirements for the HUD Technical Submission to enable project approval.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
7. Identification of Funding Sources Identification of funding sources to obtain required 25% local match.	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both

HMIS Software Selection

Task	Status	Importance	Assignment
<p>1. Software Functional Requirements Definition Defining, documenting, and prioritizing the functional requirements that the HMIS system needs to provide such as client intake & tracking, case management, information & referral, and reporting requirements.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>2. Software Technical Requirements Definition Defining, documenting, and prioritizing the technical requirements that the HMIS system needs to provide such as hardware configuration, database system, web enablement, hosting alternatives, and interface and customization capabilities.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>3. Identification & Analysis of HMIS Packages and Vendors Understanding the leading HMIS package vendors to consider and analyzing their strengths and weaknesses and appropriate fit with the functional and technical requirements.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>4. RFP Development To follow Federal Acquisition Regulations, a public procurement process is required including the issuance of a Request for Proposal (RFP) to qualified vendors.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>5. Identification & Prioritization of Package Selection Criteria Determining and weighting the criteria to be used in making the selection such as costs, functional fit, technical fit, vendor stability, vendor client base, training, support, and references.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both

HMIS Software Selection

Task	Status	Importance	Assignment
<p>6. Vendor Proposal Evaluation & Scoring Reviewing, evaluating, and scoring the detailed proposal responses from the RFP from multiple vendors.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>7. Software Demonstration Scripting and Facilitation For vendors invited to demonstrate their HMIS package, demonstrations require scripts and facilitation to ensure vendors show the aspects of the system that are most relevant to the evaluation process.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>8. Reference Checking & Site Visits Reference checks are conducted with current customers of the vendors being considered. Optionally, site visits are also conducted prior to making the final selection.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>9. Package/Vendor Selection With a selection team comprised of multiple individuals from different organizations, facilitation of meetings to make the final selection is necessary to ensure the group comes to a concensus and the selection is impartial and fair.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both
<p>10. Contract Negotiation Negotiation of technology contracts potentially involving software, maintenance & support, installation, hosting, and other services is complex and requires individuals experienced in those types of contracts.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Both

HMIS Software Implementation

Task	Status	Importance	Assignment
<p>1. Project Management HMIS implementations require professional project managers experienced in large-scale, multi-organization system implementation. Depending on the size and complexity of the implementation, this may be a full-time position.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>2. Project Administration HMIS implementations often involve significant project administrative tasks such as surveying agency needs, coordinating meetings, scheduling training for large numbers of users and extensive recordkeeping.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>3. Implementation Planning Due to the complexity, extensive implementation planning must be done to develop and monitor project work plans and GANTT charts and develop appropriate implementation rollout approaches.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>4. Project Governance & Organization Design With many different types of stakeholders from different organizations, a project governance structure must be established. In addition, the numerous and varied skill sets required for implementation require a solid project organization.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>5. Governance Meeting Facilitation Project governance boards or organizations often benefit from the use of a professional, independent meeting facilitator.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>6. Policy & Procedure Development Numerous policies and procedures need to be developed and agreed upon, such as confidentiality, security, user agreements, and related forms.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination

HMIS Software Implementation

Task	Status	Importance	Assignment
<p>7. Hardware & Network Acquisition & Installation Depending on the hosting approach employed, hardware and network equipment may need to be acquired and installed. In addition, agencies may require new or upgraded hardware to use the HMIS that must be acquired and installed.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>8. HMIS Software Installation & Setup Installation and setup of the HMIS software requires technical professionals that have experience and training in the particular HMIS package selected.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>9. Data Conversion Certain data, such as shelter profiles, must be converted from existing systems such as I&R systems. Optionally, client data from agency's legacy systems may be converted to the HMIS.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>10. System Interface Development Some provider agencies may already be using existing client tracking and case management systems that they wish to retain and build electronic interfaces to share data with the HMIS. Programming the interfaces is typically very complex.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>11. System Administrator Training Numerous system and agency administrators must be trained by personnel experienced in the particular HMIS package being implemented.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>12. User Training HMIS implementations typically involve the training of large numbers of users with varying degrees of knowledge and experience with HMIS-type computer systems.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination

HMIS Software Implementation

Task	Status	Importance	Assignment
<p>13. Help Desk Support After implementation, users require a help desk to provide support for questions, issues, or problems with the ongoing use of the HMIS system.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>14. Project Website Development & Maintenance Some continuums have used the concept of a project website to communicate with the numerous stakeholders and the public about the HMIS implementation. If employed, the project needs to be initially designed and developed and requires ongoing content maintenance.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>15. Project Marketing & Communication With many diverse stakeholders, various project marketing and communication methods must be employed to enable buy-in and provide ongoing information about the implementation status.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination
<p>16. Project Oversight Large complex system implementations often use a neutral third-party to oversee the project to provide early warning of project problems and reduce overall risk.</p>	<input type="radio"/> Complete <input type="radio"/> In Progress <input type="radio"/> Not Started	<input type="radio"/> High <input type="radio"/> Medium <input type="radio"/> Low <input type="radio"/> Not Required	<input type="radio"/> Internal Staff <input type="radio"/> Consultant <input type="radio"/> Software Vendor <input type="radio"/> Combination

ABOUT SYMMETRIC SOLUTIONS, INC.

Symmetric Solutions, Inc. ("Symmetric") is a consulting firm that specializes in the planning, selection, and implementation of HMIS solutions. Symmetric does not develop or sell HMIS software. Instead, Symmetric works with Continuums of Care and homeless provider agencies in areas such as planning for HMIS implementations, selecting HMIS software and implementation teams, training users, developing interfaces, and project management.

Founded in 1995, Symmetric has operations in Hood River, Oregon and Phoenix, Arizona. Symmetric consulting professionals serve clients nationwide. In the past few years, Symmetric has worked with over 25 Continuum of Care organizations across the country. Some of our clients represent the largest and most complex HMIS implementations in the nation.

Symmetric uses only senior-level, experience consulting professionals to serve on HMIS projects. Our consultants possess the unique skills required for HMIS projects including project management, training, strategic planning, software selection, technical systems administration, system interface development, and help desk support.

Symmetric is host of the "HMIS Discussion Forum" an Internet-based resource where HMIS project managers, system administrators, and other interested parties can share information via online discussion threads and document postings, such as best practices, forms and tools, prior experiences, advice and guidance, and other related communication. The HMIS Discussion Forum is a source for valuable HMIS information and will allow Continuum of Care organizations from all over the country to be able to communicate and collaborate about HMIS implementations. This service is provided at no charge to all users.

For more information about our services, please contact:

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