





## WHAT IS A HMIS IMPLEMENTATION?

Many Continuum of Care (CoC) organizations are planning to start or have recently started implementations of Homeless Management Information Systems (HMIS). While CoC and homeless agency personnel understand the HUD requirements to implement a HMIS, many do not understand the process and complexity of HMIS implementation.

Some think that they can simply license some HMIS software, buy a server, and hold a training class and that is all there is to the HMIS implementation. While those tasks are clearly necessary, much more is required for a successful implementation. Other tasks as shown in Figure 1 below include:

- ❑ Planning rollout approaches to best meet HUD requirements
- ❑ Establishing a project governance structure
- ❑ Establishing a project management function with project managers experienced in complex, enterprise-level, multi-organization system implementations
- ❑ Sizing, sourcing, and implementing hardware, network, and hosting requirements
- ❑ Installation, setup, and configuration of the particular HMIS software package being implemented
- ❑ System administrator and agency administrator training
- ❑ Conversion or data entry of Information & Referral data on agency profiles
- ❑ Evaluating and setup of technical infrastructure for each agency (desktop computers, network, Internet access)
- ❑ Evaluating and coordination of non-technical agency requirements (training, staff and agency readiness, workflow)
- ❑ Customization such as the development of intake screens and case management assessments
- ❑ Development of interfaces with existing client tracking and case management systems as needed
- ❑ Training of all end users (intake personnel, case managers, management)
- ❑ Conversion of data from legacy systems as appropriate
- ❑ Analysis and development of custom reports
- ❑ Post-implementation support including onsite support and help desk support

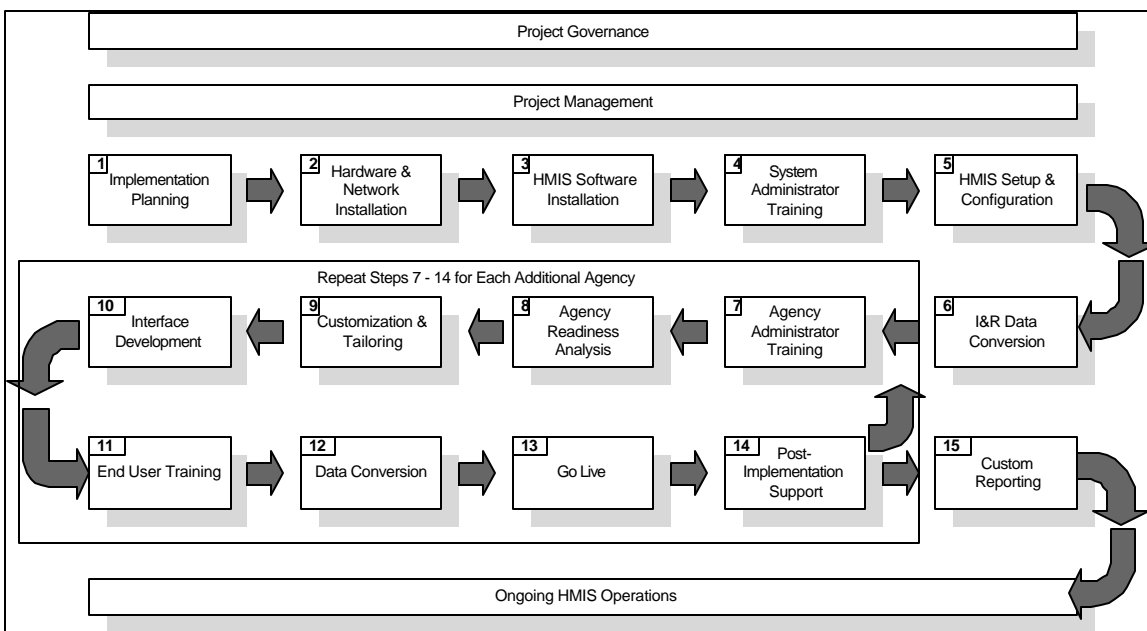


Figure 1 – HMIS Implementation Lifecycle



## HMIS IMPLEMENTATION CHARACTERISTICS

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HMIS implementations can vary significantly depending on many factors including the number of provider agencies in the Continuum, the scope of the functionality being implemented (basic data capture vs. full case management), availability of implementation and training resources, and many other factors. Following are some basic characteristics of HMIS implementation projects.

### Duration

For smaller Continuums (those with less than 15 agencies), the HMIS implementation project is typically from 3 months to 1 year. For medium-sized Continuums (from 15 – 40 agencies), projects typically range from 6 months to 2 years. For large Continuums, the implementations can range from 1 year up to about 4 years.

### Cost and Funding

Implementation costs can include:

- Software licensing, maintenance, and support
- Server and desktop hardware
- Hosting and telecommunications
- Outside services for training, customization, interface development, data conversion, project management, system administration, facilitation, and related functions
- Personnel costs for project management, data analysis, programming, system administration, training, and related functions
- Operations, administration, and office space

While costs for small and medium-sized Continuums might only be \$50,000 to \$250,000, costs for larger Continuums could range over \$2 million spread over several years. After implementation, costs will significantly decrease, as many of the startup implementation tasks are no longer needed. However, costs will still be incurred for software maintenance, system administration, help desk support, custom reporting, and retraining.

HUD provides primary funding through the SHP grants. However, HUD does require a 20% local match for the project. Local funding can come from sources such as:

- State and local governments
- Local foundations and charitable trusts
- Local United Way chapters
- Corporate contributors
- User fees from participating agencies
- Other grants

### Resources Required

HMIS implementation project typically have a mix of internal resources and external resources. Internal resources are from the lead agency and other participating agencies while external resources can be from the software vendor or other consultants. Typically, the lead agency will provide a project manager, system administrator, and training specialist. External resources are often used for project management guidance and oversight, programming for interfaces and data conversions, and training specialist (when using a “train the trainer” approach).

The number of staff dedicated to the HMIS implementation can range from one to several. Often, some of the resources are used on a part-time basis.

#### SKILLS REQUIRED FOR HMIS IMPLEMENTATION

- HUD HMIS Data & Reporting Requirements
- Homeless Provider Operations & Workflow
- Not-for-Profit Organization Operations
- Strategic Planning
- Group Facilitation & Group Dynamics
- System Requirements Definition
- Hardware Selection
- Hosting and Vendor Contract Negotiations
- Budget & Technology Costing
- Multi-Organization System Implementations
- Project Management
- Implementation Planning
- Public Relations
- Project Governance
- System Administration
- Technical Training
- User Training
- System Interface Programming & Testing
- Data Conversion Programming & Testing
- Help Desk Support



## BEST PRACTICES

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Although many CoC's have recently started their HMIS efforts, some Continuums have successfully implemented HMIS. As such, a body of Best Practices is starting to emerge. Some Best Practices identified from those successful HMIS implementations include:

- ❑ **Single Lead Organization** – HMIS implementations are most successful when there is a single lead organization responsible for the project. Shared responsibility among different organizations usually does not work.
- ❑ **Experienced Project Manager** – HMIS implementations can be quite complex, given the number of organizations participating. Use of a project manager with extensive experience in multi-organization, complex human services software implementations is a must.
- ❑ **Sensitivity to the People Aspects** – The most difficult aspects of a HMIS implementation are the people aspects, not the technology aspects. As such, sensitivity to the human issues and concerns is essential. Security and confidentiality is usually a significant concern, especially among domestic violence and HOPWA providers.
- ❑ **Mix of Internal and External Resources** – It is rare that Continuums will have all the skills needed internally. As a result, it is appropriate to use specialists from the software vendor and HMIS consultants as appropriate.
- ❑ **Reasonable Expectations** – Implementations that have reasonable expectations have the best chance for success. It is not feasible to implement 50 or 100 agencies within one year, nor is it feasible to implement all functionality within the HMIS immediately.
- ❑ **Leveraging Information from Others** – Learning from others can help speed up the implementation and help avoid mistakes. There are many sources for information such as from HUD, software vendors, consultants, and other Continuums.
- ❑ **Getting Buy-In** – Getting buy-in with the Continuum and all participating providers is essential. The Continuum and providers must be excited about the implementation or the efforts will fail.
- ❑ **Sound Training Approach** – HMIS implementations require the training of large numbers of users across many organizations. As such, a sound training approach is needed. Training large numbers in a very short time period is not feasible. Training all of the HMIS functionality in one class is typically not advisable.
- ❑ **Best Software for Your Requirements** – Selecting the best software for your requirements is imperative. Some organizations have tried to cut corners by attempting to implement software that they received for free or at a substantial discount, with disastrous results.
- ❑ **Minimizing Interfaces and Data Conversions** – While many providers may want to build automated interfaces between their legacy systems and the HMIS or may want to convert data, these tasks can be very time-consuming and risky due to the large number of different systems and their corresponding complexity.
- ❑ **Proper Project Governance** – Projects of this magnitude require a proper project governance structure. Typically, a steering committee is in place with senior-level representatives from all stakeholders to make policy decisions and communicate with the Continuum leadership. Also, one or more user groups (functional and technical) are typically convened to make more detailed decisions about the implementation. These governance groups must meet regularly to promote the implementation and to keep momentum going.



## ***ABOUT SYMMETRIC SOLUTIONS, INC.***

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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 35 Continuum of Care organizations across the country. Our clients range from small, local implementations to some of the largest and most complex HMIS implementations in the nation.

Symmetric uses only senior-level, experienced 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.

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