

# HMIS Project Proposal Process & Timeline

*Updated November 2018*

**Please anticipate 2-10 weeks for approval of HMIS Project Proposals, not including the time involved in generating a proposal.** The HMIS Governing Board, its Policy & Prioritization Committee (P&P Committee), and the Institute for Community Alliances (ICA) are committed to transparency regarding HMIS Project Proposals and therefore have established a process for stakeholder review of all proposals that do not align with the HMIS Annual Priorities.

**Projects that fall under the HMIS Annual Priorities will be reviewed and approved by ICA, without being subject to the full process described here (i.e., Additional Review steps are skipped).**

**Deadline:** HMIS Project Proposals are reviewed by ICA on the first and third Tuesdays of every month, and the P&P Committee meets the first Wednesday of every month. To be eligible for P&P review the following month, a proposal must be complete by and reviewed at the prior ICA Project Review meeting.

*For example, a proposal to be considered on the first Wednesday of March must be reviewed no later than the third Tuesday of February.*

## Generating a Project Proposal

1. Initial project *requests* are received by ICA staff in various forms – on the Helpdesk, via email, in meetings, etc.
  - Requests that are lacking basic parameters or clear commitment (e.g., “Wouldn’t it be nice if...”) are often noted by ICA staff but typically do not proceed to the next step in the process without the stakeholder initiating a follow-up conversation in which these issues are addressed.
2. To take the *request* and formalize it into a *proposal*, ICA staff work with the stakeholder to gather more detailed information on the request, including its purpose and desired deliverables. A brief phone call may be needed to address questions that arise.
3. Based on this information, ICA staff then generate a Project Proposal, including a project description, deliverables, estimated hours, requested due date, and a P&P Prioritization Tool score. This information must be as complete as possible to allow for meaningful review by ICA and P&P.

## Initial Review by ICA (approximately 2-4 weeks)

4. ICA staff send Project Proposals to the ICA Management Team for review.
5. The ICA Management Team reviews each proposal according to the following guidelines:
  - a. Incomplete proposals are returned to staff for further completion, which may involve additional conversations with stakeholders and potential delays
  - b. Mandates and proposals that align with the HMIS Annual Priorities are approved by ICA and assigned a project team and timeline
  - c. Proposals that do not align with the HMIS Annual Priorities are sent for review at the following P&P Committee meeting
6. After the Initial Review is complete, ICA notifies stakeholders of the decision and next steps.



## Additional Review by P&P Committee (approximately 2-4 weeks)

7. If the Project Proposal does not align with the HMIS Annual Priorities, ICA will send the proposal and any attending documentation at least one week before the next P&P Committee meeting.
8. P&P members individually review and rank Project Proposals in advance of the P&P Committee meeting. Rankings are sent to and aggregated by the P&P Committee co-chairs.
9. The P&P Committee meets to review aggregated rankings, address clarifying questions, discuss the merits of each proposal, and ultimately arrive at a consensus ranking of that month's project proposals. The P&P Committee may also decide to deny proposals altogether or hold proposals for future discussion and ranking.
10. After the meeting, P&P Committee co-chairs will notify project requestors of their ranking, avenues for addressing questions/concerns, and that ICA will be in touch shortly with next steps.

## Additional Review by ICA (approximately 2 weeks)

11. At the following ICA Project Review meeting, the ICA management team takes the consensus rankings from the P&P Committee and, in that order, assigns each project a project team and a timeline.

## Once a Proposal is Approved (dependent on timeline approved)

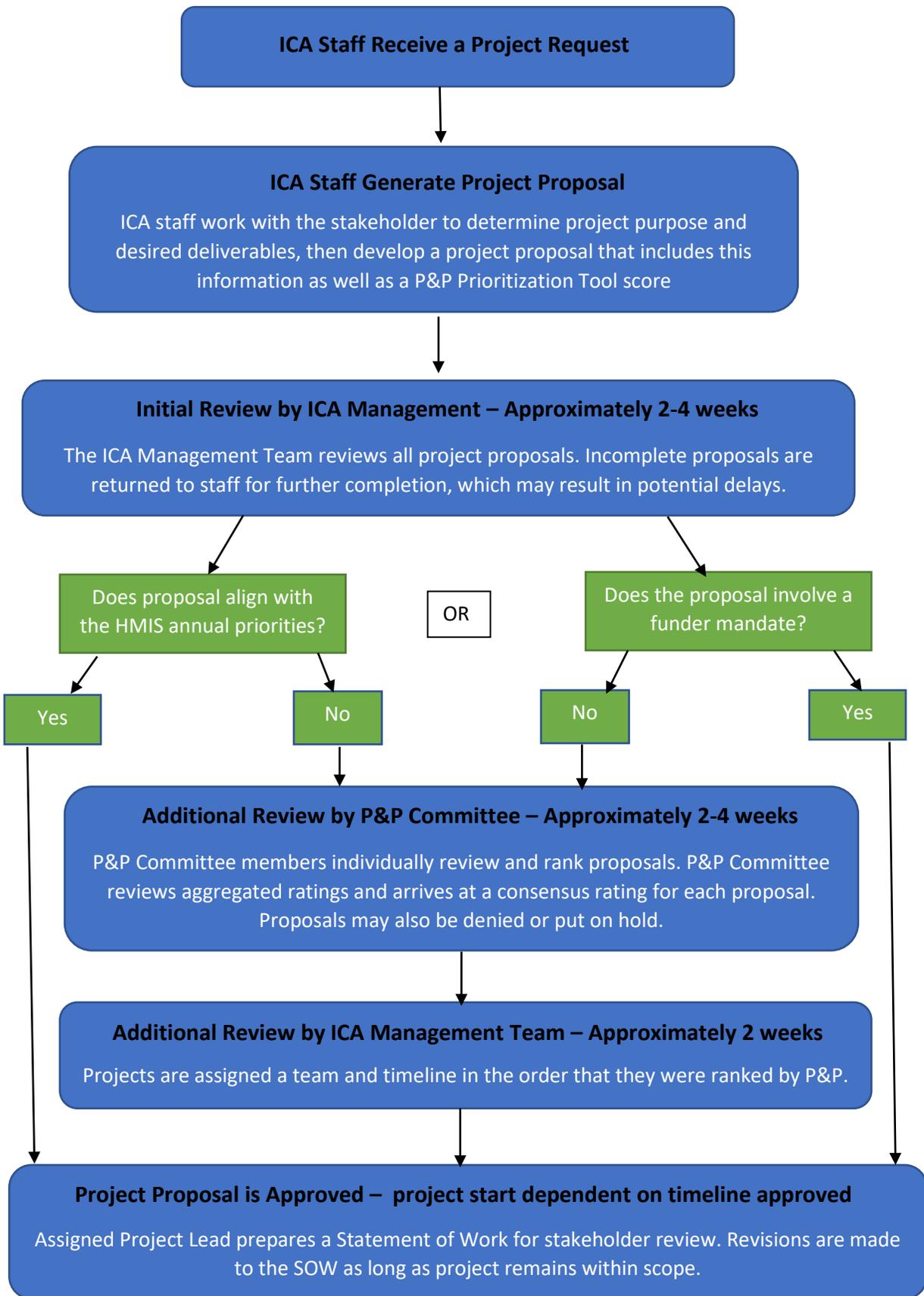
12. Once the Project Proposal has been approved, ICA informs the stakeholder of the approved timeline and the Project Team assigned.
13. As the approved project start date approaches, the assigned Project Team is assembled.
14. The assigned Project Lead completes a statement of work (SOW) and delivers it to the stakeholder for review.
15. Revisions are made to the SOW so long as the project remains within its approved scope. Substantial changes to the approved scope require additional ICA and/or P&P Committee review (depending on which entity approved the project initially).
16. The SOW is signed by the stakeholder and the project begins.

## Mid-Project Changes

17. If the project experiences scope creep or the stakeholder requests additional deliverables beyond what is agreed upon in the SOW, the project is paused and a Change Request form is completed.
18. The Change Request form is reviewed by ICA and/or the P&P Committee (depending on which entity approved the project initially).
19. ICA informs the stakeholder whether the Change Request was approved or denied. If the Change Request was denied and the stakeholder decides not to proceed with the initial SOW, the project is cancelled and any future work would require a new Project Proposal.

## Project Completion

20. At the end of the project, ICA provides the requested deliverables. Depending on the size and nature of the project, a stakeholder debrief may be scheduled.



**Mid-Project Changes**

If a project experiences scope creep or the stakeholder requests additional deliverables, a Change Form is completed and reviewed by either ICA or the P&P Committee.