Creating Efficiencies in Coordinated Entry

Clark County, WA
Who Are We?

Melissa Baker, Coordinated Entry Director (she/her)

- Oversee direct service and partner agency relationships
- Ensuring our CE/A system is efficient and as trauma informed as possible.
- Recently became a grandma for the third time!

Gwen Beebe, HMIS Coordinator (she/her)

- Administer HMIS system, provide accessible reporting and user training
- To streamline and improve data systems in order to make direct service easier and more effective
- Current quarantine projects are quilting and learning French
What Does Council for the Homeless Do?

Our mission is to provide community leadership, compelling advocacy, and practical solutions to prevent and end homelessness in Clark County, WA.

**Leadership**
- Engage the community
  - Outreach, education, understanding
- Identify and monitor needs
  - Data collection and analysis
- Convene and collaborate

**Advocacy**
- Eviction Moratorium
- Advocacy in Olympia

**Solutions**
- Severe weather planning
- Coordinated entry
Overview

New Tricks for Old Tools

- Fillable pdfs as tools
- Created ‘ping’ alert system for referrals
- HMIS-generated priority and by-name lists to streamline coordinated entry
- Generated required program documentation from HMIS
- Implemented real-time, shared budget documents

Cool Tricks for New Tools

- Establishing shared knowledge bases
- Designing automated client contact systems
- Creating self-paced training options
- Partnered with the county to launch a dashboard accepted for grant report
- Launched agency portal for submitting ERAP referrals
New Tricks for Old Tools
Fillable PDFs as Tools

Assessment Tools

- We switched to a local assessment tool based on the VI-SPDAT, fillable pdfs allow us to automate scoring

Program Documentation

- Prevention programs use fillable pdfs to determine eligibility and skip the scanning step
- Increased work–from–anywhere flexibility

Calculators

- Monthly and annual household income calculator
‘Ping’ System for HMIS Referrals

Internal Referrals

● We used to use slack, paper forms, and email for these
● Intended to flag clients that would benefit from specific additional supports
● Scalable!

External Referrals

● We used to use a hodgepodge of systems (email, hand-delivered paper files, Google sheets...)
● Using HMIS increased confidentiality
● Fully trackable, less likely that clients will fall through the cracks
Things We Generate From Our HMIS

No additional data entry work!

- Priority Pools
- By-Name Lists
- Shelter Waitlists
- Check Requests
- Client Notification Letters
- Program Documentation
Coordinated Entry Reports

Priority Pools

- Our priority list used to be a shared Google Sheet
- Replaced with a custom HMIS report
- This has saved so much time!!

Bonuses

- Endless options to customize by referral request
- Easy to implement coordinated entry prioritization changes
Coordinated Entry Reports

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Coordinated Entry Reports

Shelter Waitlists

● We used to use a shared Google Sheet for tracking folks in need of shelter
● Could only maintain it for families, single women, and couples
● Replaced with custom HMIS reports

Bonuses

● Old waitlist used a subjective, three-point vulnerability ranking system
● New waitlist uses objective vulnerability criteria
Coordinated Entry Reports

By-Name Lists

- Our first attempt at a veteran by-name list was an HMIS report based on referrals
- Switched to event-based by-name lists to leverage the data entry that was already happening

Bonuses

- Easy to extend by creating by-name lists for other populations
**Program Documents**

**Check Requests**
- Rent payments for a rapid re-housing program requiring check requests each month

**Rent Change Notifications**
- A rapid re-housing program with rent payments that change on schedule needs notification letters sent monthly

**Program Documentation**
- We used the information entered in HMIS to generate the Commerce eligibility forms for our CARES Emergency Rental Assistance Program (ERAP)
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Shared Budgets

Maybe The Only Time We’ll Say: “Use Google Sheets!”

- The whole diversion team uses shared budget sheets to stay informed about how much remains of each funding source
- Other programs use it to track individual fund sources
- Automatically creates colorful live reports based on the information entered
Cool Tricks for New Tools
Shared Knowledge Bases

FAQ and Resource Sharing

- Every staff member knows about a different set of resources
- The question is how to share that information
- We used Trello to create an accessible and searchable list

Landlord Information

- The answer to the endless “does anyone have an email for Apartment X” instant messages
- Stores information about contact methods, eligibility criteria, and agency experiences with that landlord in Airtable
Automated Texting

- System uses Airtable, automate.io, and Twilio
- Conducting client surveys
- Requesting feedback for development team
- Handling bulk outreach and basic eligibility screening for placement requests

Survey Notes

- Response rate went from roughly 10% with paper and SurveyMonkey surveys to 45% with texted surveys
Staff Training

What It Is

- Self-paced video training modules
- A combination of recorded videos and self-scoring quizzes on each topic help staff feel comfortable faster
- Saves significant training time
- Increased turnaround time for onboarding new staff
- Flexibility to start training and finish later
- No need to officially schedule training
Staff Training

How It Works

- Used built-in Windows software for recording training videos (Windows key + G)
- Videos are hosted on Youtube
- Training is done through a Google Form with the videos embedded
- Google Form has a built-in scoring mechanism
- Use the Form Notification extension to share scores, allow self-pacing, and notify administrator of completion
Reporting Dashboard

County-Accepted Reporting Tool

- Worked closely with the county in development to make sure the funders trusted it
- Increases placement transparency because aggregate program-level data is refreshed every month
- Increased understanding of actual resources available in system
- Makes self-serve analytics easy
ERAP By/For Referrals

Streamlining Partnerships

- Bi-lingual online form for referrals
- Built-in eligibility verification
- Automatic email or Slack notifications when referrals are submitted
- Option to generate funder-required documentation directly from portal
Wrap Up
Questions?

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