Data Literacy Institute
Planning for Data Requests

Nov 1, 2018

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Data Literacy Institute

The goal of the Data Literacy Institute is to help staff at all levels enhance their understanding of the data collected in HMIS, how to measure program performance, and how to use data to effectively communicate the success of your programs.

Agenda

- Evaluation Planning
- Best Practices When Managing Data Requests

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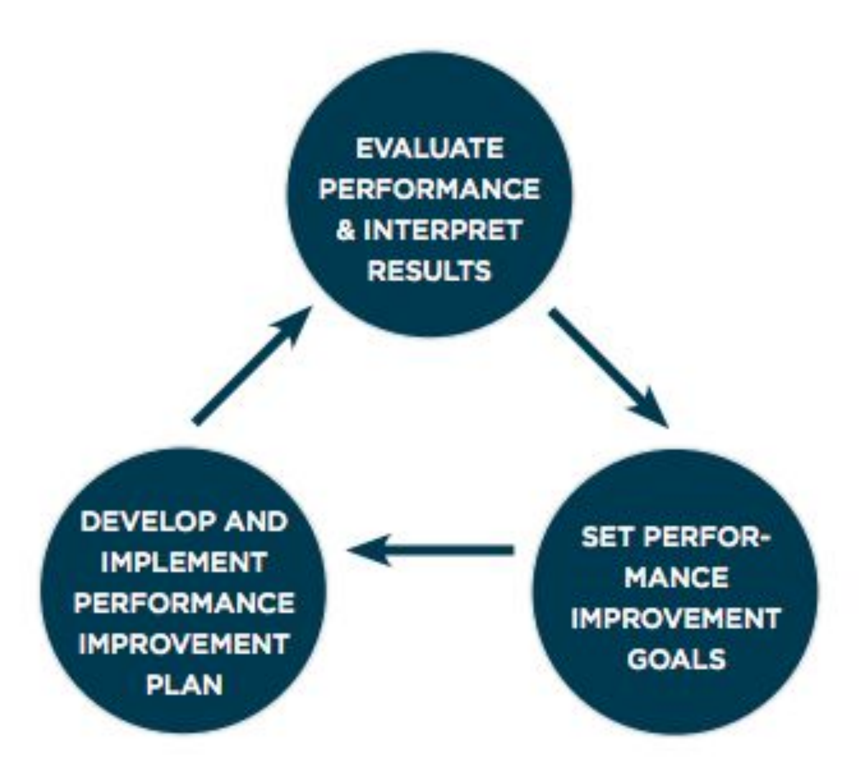
Evaluation Planning

Overview



When planning your evaluation, consider:

- Purpose
- What will you evaluate?
- How will it be collected?
- How will you use the information?

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Purpose of Evaluation Planning

Why do we measure outcomes?

1. Contractual/funder obligations
2. Performance Management
3. Project Management
4. Other?

Try to streamline evaluation questions when possible, but not all outcome measures will serve all purposes.

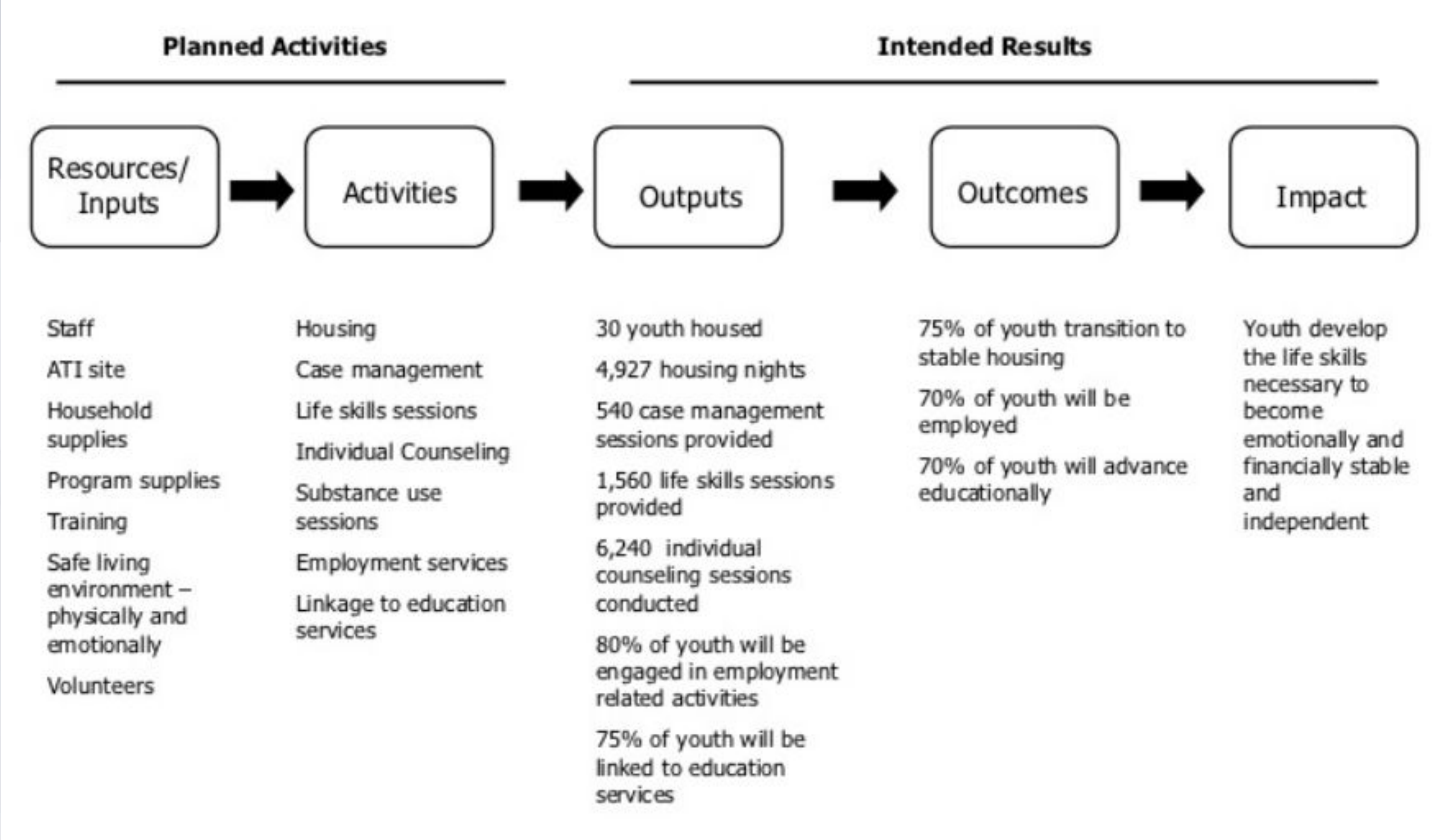
Scope of the Evaluation

Minimum

- Contract Performance Measures
- Agency or Program-Specific Outcomes

Others

- Effectiveness of case managers
- Effectiveness of variations in program delivery (length of time of assistance, type of supportive services)
- Effective interventions for clients with specific characteristics or needs


Planned Activities
Intended Results
Resources/ Inputs
Activities
Outputs
Outcomes
Impact
Staff
ATI site
Household supplies
Program supplies
Training
Safe living environment – physically and emotionally
Volunteers
Housing
Case management
Life skills sessions
Individual Counseling
Substance use sessions
Employment services
Linkage to education services
30 youth housed
4,927 housing nights
540 case management sessions provided
1,560 life skills sessions provided
6,240 individual counseling sessions conducted
80% of youth will be engaged in employment related activities
75% of youth will be linked to education services
75% of youth transition to stable housing
70% of youth will be employed
70% of youth will advance educationally
Youth develop the life skills necessary to become emotionally and financially stable and independent

How data will be collected?

How are benchmarks set?

What can be measured in HMIS? Your own database?

Do data collection tools need to be developed (surveys, assessments, etc.)

Do staff understand the data collection requirements and workflow?

Can reports be scheduled to run automatically?

Who will run reports? Who will review data quality?

Scheduled times to review performance? (at least quarterly recommended)

Using Outcome Data

Who is involved in reviewing outcome data?

How often will you make changes to programs?

How will you communicate outcomes to funders and other stakeholders?

How will you share outcomes with program staff?

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Other Tips

Make SMART Goals

Use data to advocate for necessary changes to your contract

Keep it simple and streamline outcomes wherever possible

Revisit goals at least annually

Make your results and reports user friendly

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Tracking Evaluation Data Using HMIS

Depending on the type of evaluation, HMIS can help you track your data!

Existing Resources:

- Tracks data on demographics, program enrollment and exit information, services
- Reports that generate program outcomes (income, exit destination, benefits), services provided
- Data Analysis tab if basic custom reports need to be generated

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Can’t find what you need in HMIS?

If your evaluation needs to collect additional information that you’d like to track in HMIS, contact Bitfocus

Items that are possible to add to allow for more data tracking:

- New / additional services (options to track Funding Source, Attendance feature for high-volume services, time tracking by 15 min increments, etc)
- Custom questions to program entry/status update/exit screens (Note: some programs, such as UPLIFT and CCP, have set questions that are defined by OSH)

If you’re not sure the best way to track things, Bitfocus can talk through options with you

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Considerations in Adding Services / Questions to HMIS

- ✓ What are the reporting needs? Is it possible to get the data/reports needed through HMIS (either through the Report Library or Data Analysis tab)?
- ✓ If HMIS doesn't specifically track what I need, is there something that is currently already tracked that I can use?
- ✓ What will be the added data entry burden for staff? Will it be easy for staff to understand what to enter and when to enter it? Will it be easy to maintain good data quality?
- ✓ How much time will I need in order to request any new services/programs and train users?

Sharing Best Practices

Any tips about for evaluation planning?

Best Practices When Managing Data Requests

Best Practices

- Be consistent
- Be organized
- Show your work

Be Consistent

- Have a set of questions to ask anyone who is requesting data:
  - What programs should be included?
  - Time period?
  - Households or individuals?
  - Any specific population (families vs singles, youth, veterans, etc)?
  - Is the request associated with a specific grant or funding source?
  - Due date?
  - Purpose for the report?
- Use the same logic for the same statistic
  - Use the same report in the Report Library (or Data Analysis tab) if you are running the same type of statistics across multiple reports (e.g. exits to permanent housing)
  - Have definitions on what report/logic to use for frequent statistics

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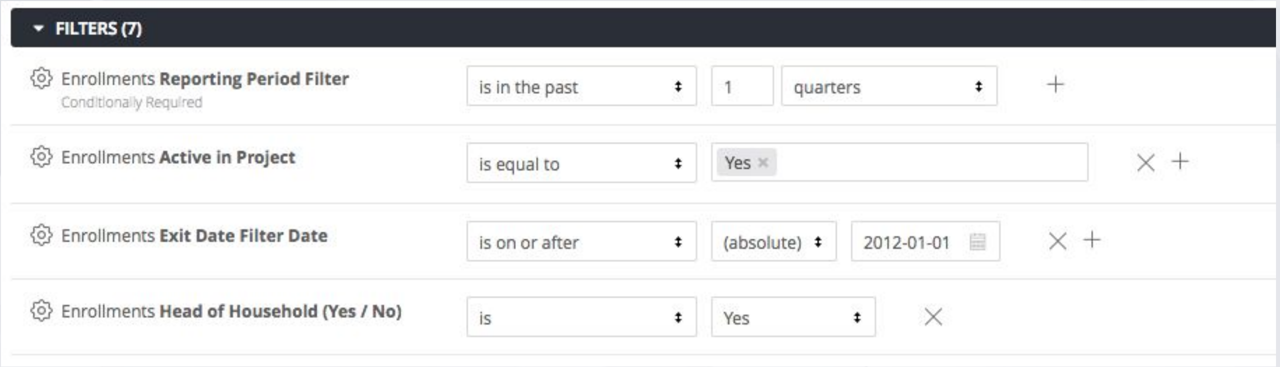
Be Organized

- Create a folder for your reports
  - Include folders by grant / program / time period
  - Save reports even if they are "one off" reports - you never know if they will come in handy!
- Save
  - Final report or numbers provided
  - Backup reports or documents used in calculating statistics
  - If there are specific steps you take each time
    - What reports you usually run
    - Data Quality checklists you used, if any
    - Important notes/reminders/instructions

Show Your Work

- If needed and when appropriate, provide backup information when sending your report
- Data Analysis/Looker tip: save the Looker filters to share with others so they can replicate the report



Sharing Best Practices

Any tips about for evaluation planning and managing data requests?

Resources

- Report Library
  - https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library
- Bitfocus SCC HMIS Help Desk
  - sccsupport@bitfocus.com
  - 408.596.5866 x2
- Data Literacy Institute page on the SCC HMIS site
  - http://scc.hmis.cc/training/data-literacy-institute/

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Upcoming Workshops

Nov 7: How to Request Data (Agency Staff)

Can’t find something in the Report Library? Want to take a more detailed look at your data, but need help? Find out how to effectively ask your agency's data analyst, HMIS Administrator, or the Bitfocus Help Desk about your reporting needs. We will also be cover how to be a good data partner - how to monitor your own data and participate in planning for reporting and evaluation requirements.

Feb 7: How to Tell Your Story (Agency Manager)

Want to know how to use data to message your agency's successes to stakeholders and the community? Join us for some tips on how to best tell your story through your data.

Feb 12: Statistics, Charts, and Graphs (Agency Staff)

Join us for this hands-on workshop on how to create your own statistics, charts, and graphs!

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