ICA MN COORDINATED ENTRY DASHBOARD: FACILITATION GUIDE
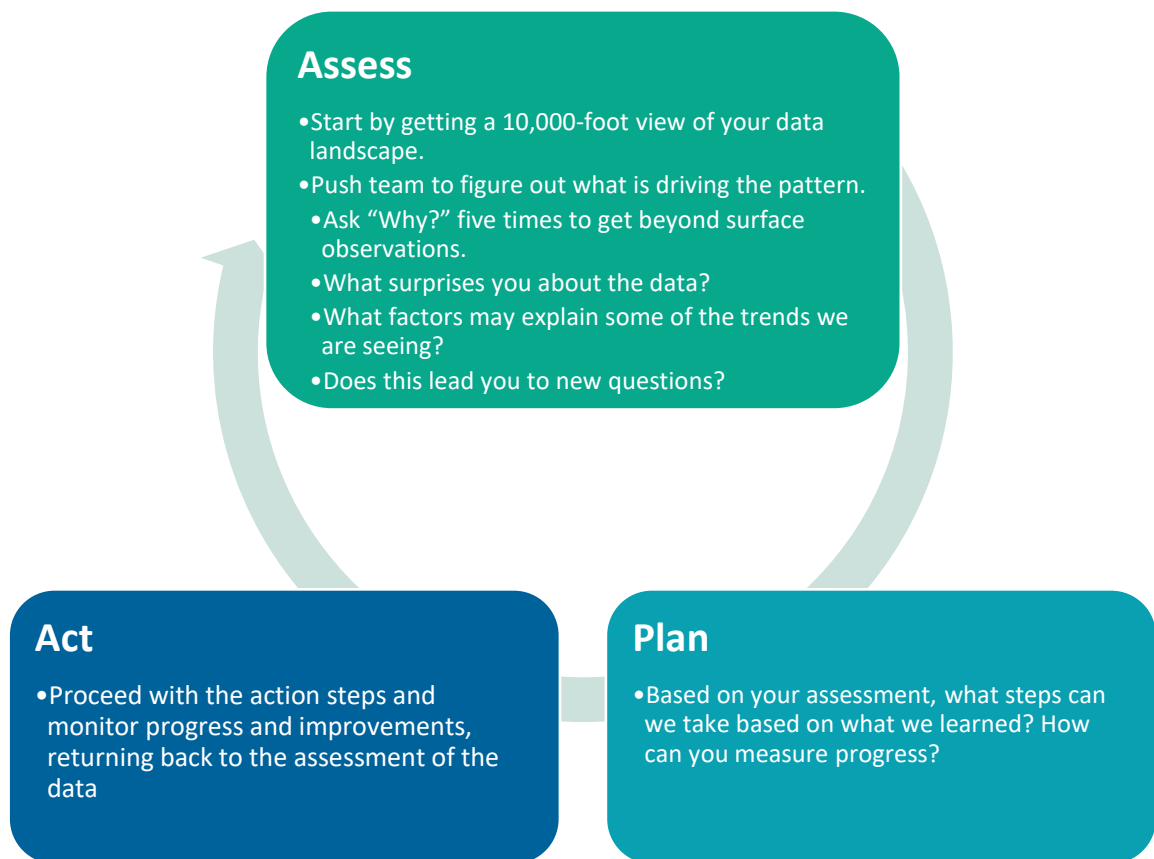
WHAT IS THE DASHBOARD?

The ICA Coordinated Entry (CE) Dashboard is a tool to help your community monitor the coordinated entry system for changes, gaps, and slowdowns that need to be addressed.

The CE Dashboard pulls from the MIN-00-CES-211 CES Monitoring Report to offer your community a picture of coordinated entry through the lens of HMIS data.

ASSESSMENT TO ACTION

The assessment to action cycle is never-ending and we hope that the CE Dashboard helps facilitate action in your community.

Assess
- Start by getting a 10,000-foot view of your data landscape.
- Push team to figure out what is driving the pattern.
  - Ask "Why?" five times to get beyond surface observations.
  - What surprises you about the data?
  - What factors may explain some of the trends we are seeing?
  - Does this lead you to new questions?

Act
- Proceed with the action steps and monitor progress and improvements, returning back to the assessment of the data

Plan
- Based on your assessment, what steps can we take based on what we learned? How can you measure progress?

UNDERSTANDING & INTERPRETING THE DASHBOARD

This guide contains focusing and guiding questions to help you facilitate discussions using data from the dashboard to support coordinated entry evaluation and planning.

For more data dialogue facilitation tools, check out our Turning HMIS Data into Insight guide. You can also reference our Breaking Down the Dataset 6-Step Approach to supplement the guiding questions below.

The data in the CE dashboard is relevant to anyone involved in coordinated entry in your community. Analyzing this information with individuals with different coordinated entry roles, including planners, assessors, and providers, may provide context to the numbers presented in the dashboard.

KICKING IT OFF – PROVIDE AN OVERVIEW

For all groups, especially those not familiar with the CE Dashboard, begin with an overview of the Clients and Time Dashboard. Make sure the group understands where the information from the dashboard is coming from and limitations of the data presented.

- One example of a limitation is that the dashboard includes only individuals entered in the HMIS. In the Appendix, you will find a Calculation Guide to provide you with more details on how dashboard visualizations are being calculated. While this may be too much information to present in the overview, know that you have a reference for questions on how numbers on the dashboard are being calculated.

Demonstrate some of the functionality of the dashboard

- Show participants how to select Filters and Details. If you would like participants to focus on a certain CoC or County for purposes of analysis, pay special attention to those filters.
- Make sure participants understand how to set Current and Comparison Report Periods. If you are having the group focus on certain time period, specify during this time.

DISCUSSION TOPIC 1: WHAT DO YOU SEE?

Start with a 10,000 Ft View of the Data.

Have meeting participants explore the dashboard. Either individually, in small groups, or as a larger group, begin noting down observations from the dashboard.

Observations should be in the form of a descriptive statements. In this portion of the meeting, urge participants to stick to the facts. Beginning with observations allows us to avoid forming an opinion and jumping to conclusions without the full story.

Example of an observation: *500 fewer people entered the priority list this quarter than last quarter.*

Example of a conclusion: *Fewer people entered the priority list this quarter because we are spending more money on prevention services.* Is this really the case? Or did your CoC change the criteria to be added to the priority list? Or is this a seasonal trend? This is something to investigate but try to steer your group away from forming these opinions too early.

Guiding Questions

- Pretend you are writing an article about coordinated entry in our community, what are three statements you can make using data from the dashboard?

DISCUSSION TOPIC 2: QUESTIONING THE DATA

This is another activity to help the group explore the dashboard. You can have participants dig into each visualization on the dashboard and explain their rationale for what they are seeing. What questions does each of the rationale statements spark about the data?

Here's an example, using the "…entering the Priority List" visualization.
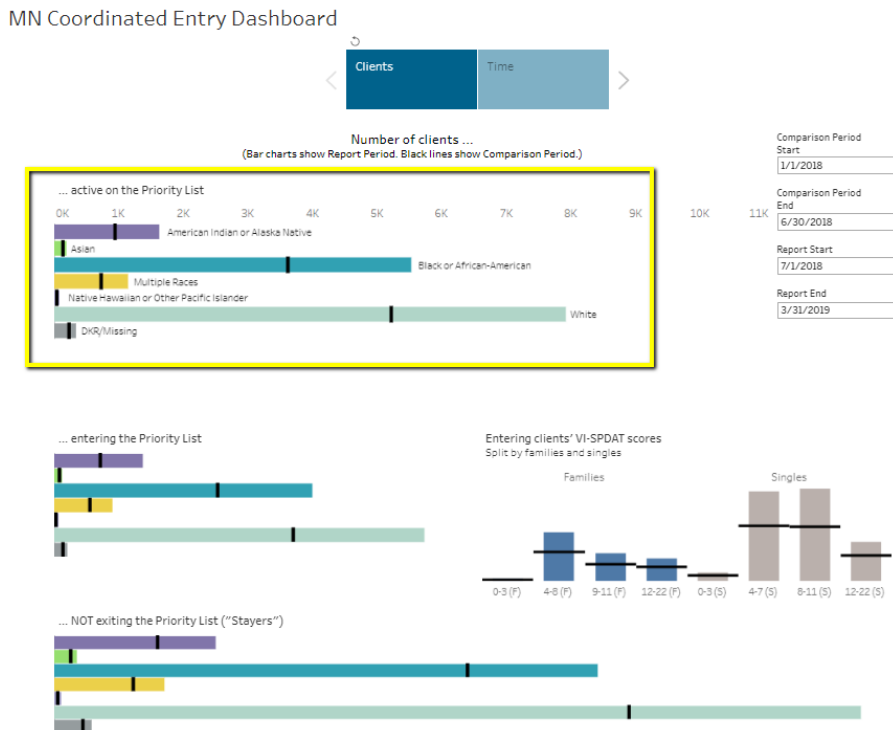
	If the number in this report period is higher the comparison period, what do you know? What questions do you have?	If the number in this report period is lower than the comparison period, what do you know? What questions do you have?
…entering the Priority List	More people are entering the priority list in this report period. Is this because we changed criteria for being added to the CoC's priority list? Are there certain subpopulations that are contributing to the increase? How many people are leaving? Is the ratio of persons entering to leaving this report period the same as the last comparison period?	Fewer people are entering the priority list in this report period. Have numbers decreased in other CoCs? Have VI-SPDAT scores or demographics of those entering changed?

DISCUSSION TOPIC 3: ANY SURPRISES?

Next, ask the participants to draw out any surprises, or concerns about any of the information presented on the dashboard.

Guiding Questions

- What are some assumptions that you have that are confirmed by the data in the dashboard?
- What surprises you about the data in the dashboard? For each of the visualizations on the dashboard, is the number higher or lower than you expected?

DISCUSSION TOPIC 4: WHAT MAY BE DRIVING THE PATTERN?

You should have a list of dashboard observations that surprised the group participants. For each of these observations, push the team to figure out what may be driving the pattern.

Note, sometimes this can lead a group to question whether the data is correct. If this occurs, ask the group why they believe the data is not correct. Depending on the conversation, you may also want to ask the group if it is okay to continue the activity with the assumption that the data is correct. If you have done the work to identify limitations and build trust in the data, it can minimize people's fears of it not being correct.

Guiding Questions

- Ask "Why?" five times to get beyond surface observations.
- What factors may explain some of the trends we are seeing?
- Does this lead you to new questions?

DISCUSSION TOPIC 5: REFLECTION

Have participants take time to summarize their key take-aways from the dashboard data. Based on their assessment, what actions can the group take based on what they learned? This may vary by group, but possible next steps may include the following:

- Identify one goal of coordinated entry in the community and choose a metric from the dashboard to help track progress towards the goal.
- Create a list of research questions to begin analyzing coordinated entry data further. Are there other data sources that are needed to analyze the CE data?
- Recommend a coordinated entry policy change and support with data from the dashboard.
- Set up a monitoring and evaluation plan based on goals of coordinated entry and incorporate data from dashboard to track progress.
    - HUD Coordinated Entry Management and Data Guide: Includes information on coordinated entry performance monitoring and evaluation

APPENDIX: CALCULATION GUIDE

CLIENTS DASHBOARD

… active on the Priority List

Counts clients with a Start Date (Prioritization) less than or equal to the Report/Comparison Period End, and an End Date (Prioritization) that is either greater than or equal to the Report/Comparison Period Start or null.

…entering the Priority List

Counts clients with a Start Date (Prioritization) less than or equal to the Report/Comparison Period End and greater than or equal to the Report/Comparison Period Start.

Entering clients' VI-SPDAT scores

Counts clients who qualify as "entering the Priority List" according to their household type and VI-SPDAT score. Client value for HH Type (Prioritization) is categorized into Families or Singles as shown below. VI scores are split into ranges within household type. Clients with a Missing/Null household type are not shown in the graph.

Families: FA, FC, FY

Singles: SA, SC, SY

Missing/Null: FM, SM, MA, MC, MY, MM

…NOT exiting the Priority List ("Stayers")

Counts clients whose End Date (Prioritization) is null or greater than the Report/Comparison Period End and who also qualify as "active on the Priority List" (above).

…leaving the Priority List

Counts clients with an End Date (Prioritization) that is not null and is less than or equal to the Report/Comparison Period End and greater than or equal to the Report/Comparison Period Start.

The graph showing reasons for leaving counts clients qualifying as leaving, above, according to their Destination (Prioritization), Reason (Referral) or presence of a Valid Start EE HMI Date (Prioritization).

If a client has a Valid Start EE HMI Date at any point in the data, the client counts as "Housed". If not, the grouping uses the Destination associated with the Prioritization transaction that qualifies the client as leaving above. If no Destination is recorded, the grouping uses the Rease associated with the client's most recent Referral transaction.

Destinations and Reasons are grouped as follows:

Housed:	(Canceled) Client found housing/self-resolved Permanent Client found housing (self-resolved) *(retired picklist value)*
Not Housed:	(Canceled) Client is out of shelter (Canceled) Client placed in institutional setting (Canceled) Client refused service (Canceled) Deceased (Declined) Client is eligible, but provider unable to accept (Declined) Client is not eligible, other (Declined) Client is not eligible, over income (Declined) Client refused service (Declined) Client unable to locate housing (Declined) Property Management denial – eviction history/money owed Accepted into TH or PH (Referral Workflow) Homeless Institutional Non-Homeless Client is eligible, but provider unable to accept *(retired picklist value)* Client is not eligible *(retired picklist value)* Client is out of shelter *(retired picklist value)* Client placed in institutional setting *(retired picklist value)*

	Client refused service and not returned to list *(retired picklist value)*
	Client refused service and returned to list *(retired picklist value)*
	Deceased *(retired picklist value)*
	Unable to locate housing *(retired picklist value)*
Unknown:	Null
	(Canceled) Client moved outside of CoC
	(Canceled) Client unreachable – disappeared
	(Declined) Client unreachable – after initial contact
	(Declined) Other
	DKR
	DNC/No Intv
	Missing
	Unknown
	Client disappeared or unreachable *(retired picklist value)*
	Client moved outside CoC *(retired picklist value)*
	Other *(retired picklist value)*

…with a project entry date

Counts clients with a non-null End Date (Prioritization) and an End Date (Prioritization) and Valid Start EE Date (Exits) that are less than or equal to Report/Comparison Period End and greater than or equal to Report/Comparison Period Start.

Divides clients by Valid EE Project Type (Exits) according to the following grouping:

PH (non-RRH): PH – Housing only (HUD), PH – Housing with services (no disability required for entry) (HUD), PH – Permanent Supportive Housing (disability required for entry) (HUD)

RRH: PH – Rapid Re-Housing (HUD)

TH: Transitional housing (HUD)

…with a housing move-in date

Counts clients with a non-null End Date (Prioritization) whose End Date (Prioritization) and Valid Start EE HMI Date (Exits) are less than or equal to Report/Comparison Period End and greater than or equal to Report/Comparison Period Start.

Divides clients by Valid EE Project Type (Exits) as in …with a project entry date.

Referrals (hover for reason)

Counts referrals (NOT clients) where the End Date (Referral) is less than or equal to the Report/Comparison Period End and greater than or equal to the Report/Comparison Period Start. Divides referrals by Outcome (Referral), grouping "Accepted" and "Accepted on Wait List" together into Accepted, and by Reason (Referral).

TIME DASHBOARD

Average Days … to get a referral

Counts number of days between clients' earliest End Date (Referral) that falls in the relevant period (less than or equal to Report/Comparison Period End and greater than or equal to Report/Comparison Period Start) and latest Start Date (Prioritization) that is less than or equal to this end date.

Averages number of days across all clients with a qualifying End Date and Start Date.

Average Days … to project entry

Counts number of days between a client's earliest Valid Start EE Date (Exits) that falls in the relevant period and latest Start Date (Exits) that is less than or equal to this start EE date.

Averages number of days across all clients with a qualifying Valid Start EE Date and Start Date.

Average Days … to housing move-in

Counts number of days between a client's earliest Valid Start EE HMI Date (Exits) that falls in the relevant period and latest Start Date (Exits) that is less than or equal to this start EE HMI date.

Averages number of days across all clients with a qualifying Valid Start EE HMI Date and Start Date.

Average Days … on the Priority List (Clients not exiting)

Counts number of days between the Report/Comparison Period End and a client's latest Start Date (Prioritization) that is less than or equal to the Report/Comparison Period End.

Averages number of days across all clients who qualify as "active on the Priority List" and who have an End Date (Prioritization) that is null or is greater than the Report/Comparison Period End.

FILTERS AND DETAIL SELECTION

Selector	Calculation
Filters:	**Filters data based on clients'…**
CoC	CoC Code (Prioritization)
County (Client Residence)	County of Primary (Current) Residence (Prioritization)
Household Type	HH Type (Prioritization), grouping all values with a missing component ("M") into Missing
HUD Homeless	Lit Hmls (Prioritization)
Select Detail	Groups clients based on the selected field as found in Prioritization. NOTE: Select Detail uses clients' most up-to-date values available in the dashboard data.
Comparison Period Start/End Report Start/End	Limits calculations as described above. On the Clients dashboard, the bar charts show Report Period counts and black lines show Comparison Period counts. If selected dates fall outside data available in the dashboard, results will only include available data. Dashboard data is limited to approximately two years prior to the current date and may not extend all the way to current, depending on when it was last updated.