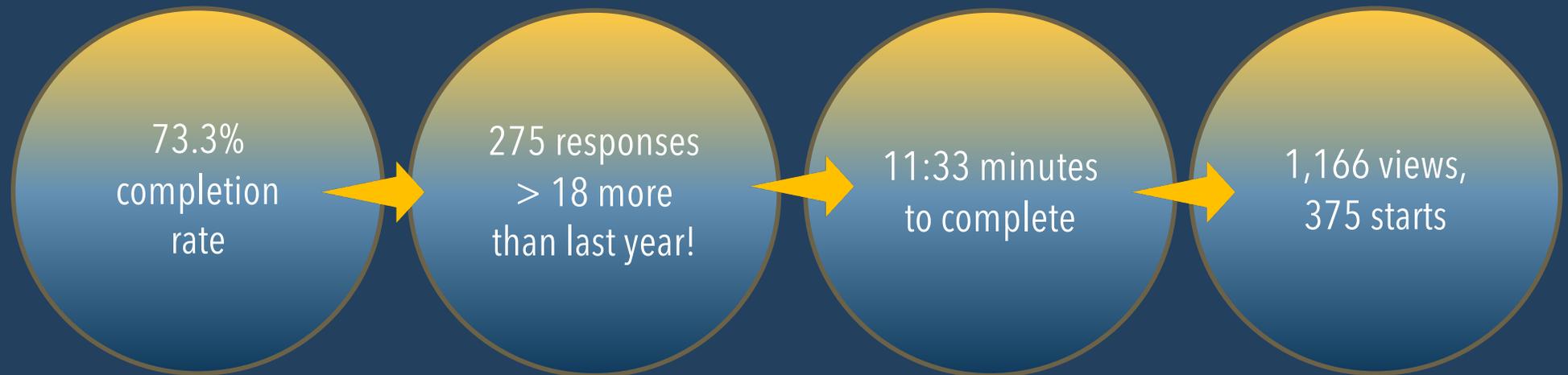# Goals

Understand the results of the Annual Survey

Note changes & improvements for next year

# Survey Logistics

73.3% completion rate

275 responses > 18 more than last year!

11:33 minutes to complete

1,166 views, 375 starts

# Type of Services Agencies Provide

Half of respondents offer Coordinated Assessment/Coordinated Entry Services

The second highest offered was supportive services

9.1% responded as "Other" down 1.8% from last year

Coordinated Assessment / Coordinated Entry (e.g. VI-SPDAT)

130 resp. **47.3%**

Supportive Services (e.g. General assistance, medical or behavioral health services, counseling, job training & placement childcare, transportation; Federal, state & local benefits)

127 resp. **46.2%**

Recommend updating "Prevention" with examples to lower amount of "other" responses

# Type of Services Agencies Provide - Other

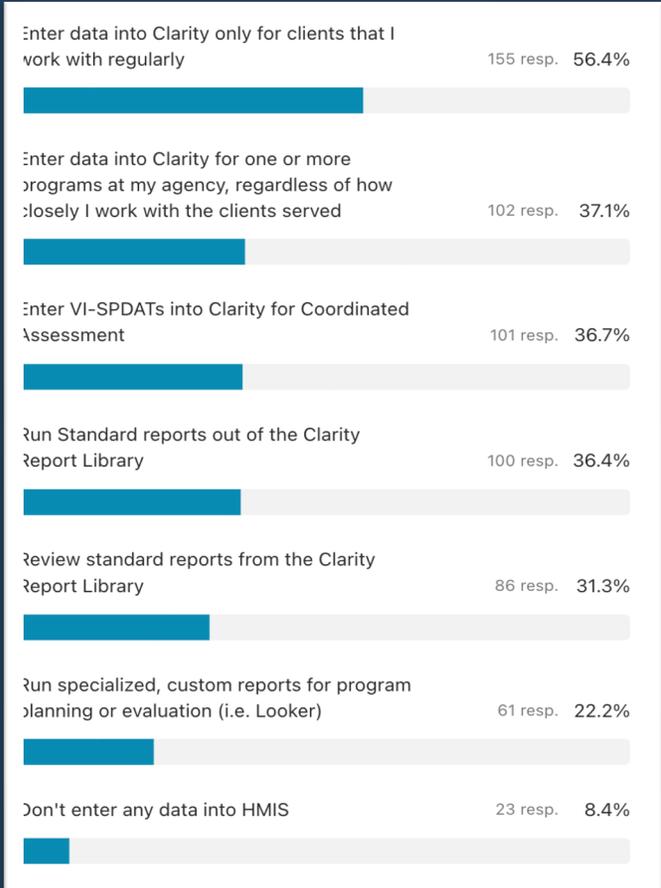| Services |
|---|
| Data Analysis or Data |
| EAN Services |
| Employment Assistance |
| Food and Clothing Assistance |
| Financial Literacy |
| Medical or Behavioral Health and Social Services |
| Case Management |
| Reentry Services |
| Referral to different resources |
| Safe Parking and Housing Placement |
| Contract Monitoring |
| No Direct Services |

**9.1%**

# Type of Services Agencies Provide – 2025 Proposed Options

| SERVICE OPTION | EXAMPLE |
|---|---|
| Coordinated Assessment / Coordinated Entry | Example: Includes VI-SPDAT and HPAT |
| Case Management | |
| Emergency Shelter | |
| Other | |
| Permanent Supportive Housing | |
| Homeless Prevention Services | |
| Rapid Rehousing | |
| Street Outreach | |
| Supportive Services | General assistance, medical or behavioral health services, counseling, job training & placement childcare, transportation; Federal, state & local benefits |
| Transitional Housing | |
| UPLIFT | |

# Using Clarity

Enter data into Clarity only for clients that I work with regularly — 155 resp. 56.4%

Enter data into Clarity for one or more programs at my agency, regardless of how closely I work with the clients served — 102 resp. 37.1%

Enter VI-SPDATs into Clarity for Coordinated Assessment — 101 resp. 36.7%

Run Standard reports out of the Clarity Report Library — 100 resp. 36.4%

Review standard reports from the Clarity Report Library — 86 resp. 31.3%

Run specialized, custom reports for program planning or evaluation (i.e. Looker) — 61 resp. 22.2%

Don't enter any data into HMIS — 23 resp. 8.4%

**56.4%** — Enter data into Clarity only for clients that they work with regularly

**37.1%** — Enter data into Clarity for one or more programs at my agency, regardless of how closely they work with the clients served

**36.7%** — Enter VI-SPDATs into Clarity for Coordinated Assessment
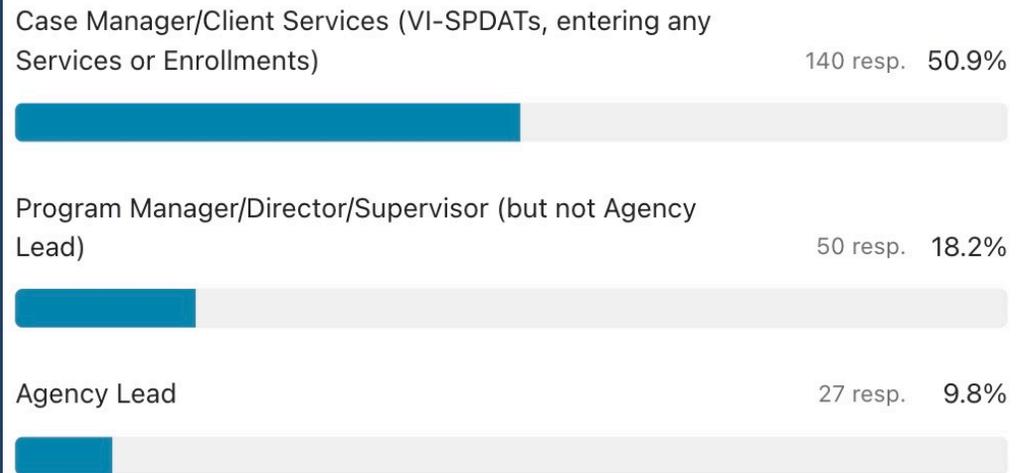
**8.4%** — Do not enter any data into HMIS

# Primary Role

Case Manager/Client Services was the primary role of respondents

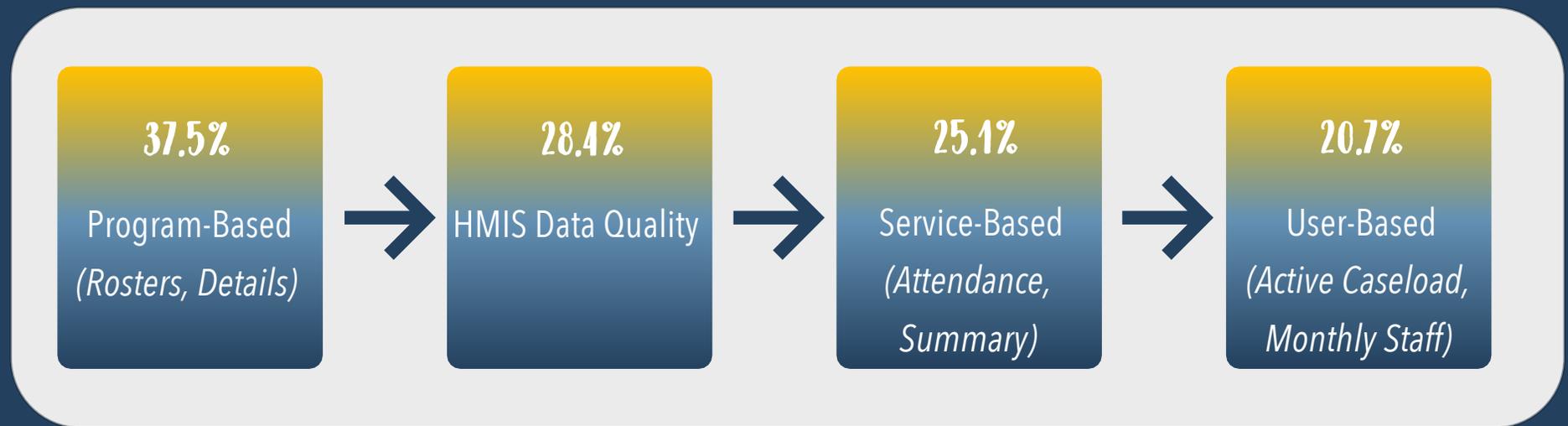Program Manager/Director/Supervisor were the next highest

Agency Lead

Case Manager/Client Services (VI-SPDATs, entering any Services or Enrollments) — 140 resp. **50.9%**

Program Manager/Director/Supervisor (but not Agency Lead) — 50 resp. **18.2%**

Agency Lead — 27 resp. **9.8%**

*Recommend updating options to reduce the selection of "Other" when not applicable*

# Frequently Run Reports

| 37.5%<br>Program-Based<br>*(Rosters, Details)* | → | 28.4%<br>HMIS Data Quality | → | 25.1%<br>Service-Based<br>*(Attendance, Summary)* | → | 20.7%<br>User-Based<br>*(Active Caseload, Monthly Staff)* |
|---|---|---|---|---|---|---|

*All frequently run reports down 5-10%. Potential increase in longtime users implementing Data Analysis reports or developing reports in alternate software.*
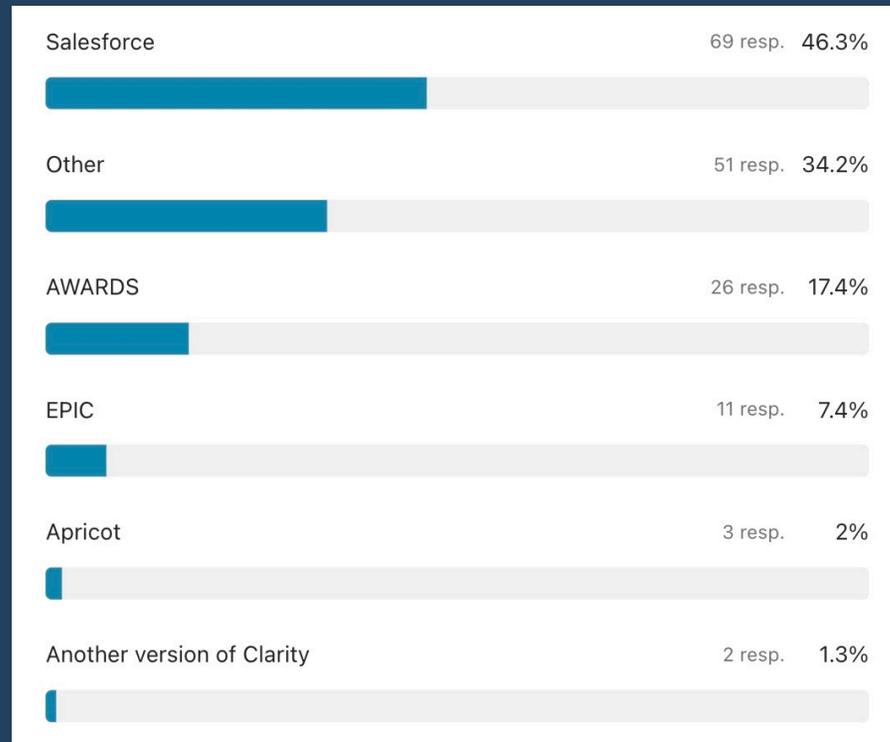
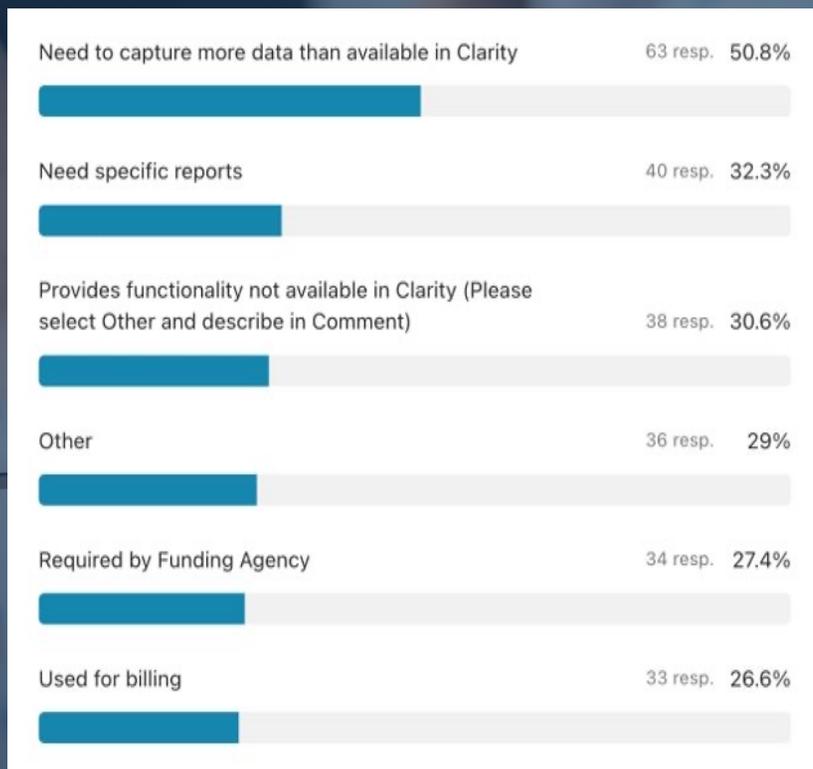# "Does your agency use *another* Data Management System?"

**49.4%
2023**

**56.7%** responded **YES**, they do use another data management system

**43.3%** responded **NO**, they do not use another data management system

| | | |
|---|---|---|
| Salesforce | 69 resp. | **46.3%** |
| Other | 51 resp. | **34.2%** |
| AWARDS | 26 resp. | **17.4%** |
| EPIC | 11 resp. | **7.4%** |
| Apricot | 3 resp. | **2%** |
| Another version of Clarity | 2 resp. | **1.3%** |

# Reasons for Additional Data Management System

## 2023

| | | |
|---|---|---|
| Need to capture more data than available in Clarity | 63 resp. | 50.8% |
| Need specific reports | 40 resp. | 32.3% |
| Provides functionality not available in Clarity (Please select Other and describe in Comment) | 38 resp. | 30.6% |
| Other | 36 resp. | 29% |
| Required by Funding Agency | 34 resp. | 27.4% |
| Used for billing | 33 resp. | 26.6% |

## 2024

| | | |
|---|---|---|
| Need to capture more data than available in Clarity | 80 resp. | 52.6% |
| Need specific reports | 53 resp. | 34.9% |
| Required by Funding Agency | 53 resp. | 34.9% |
| Other | 50 resp. | 32.9% |
| Provides functionality not available in Clarity (Please select Other and describe in Comment) | 42 resp. | 27.6% |
| Used for billing | 30 resp. | 19.7% |

# Data Quality (Scores Based 1-5)
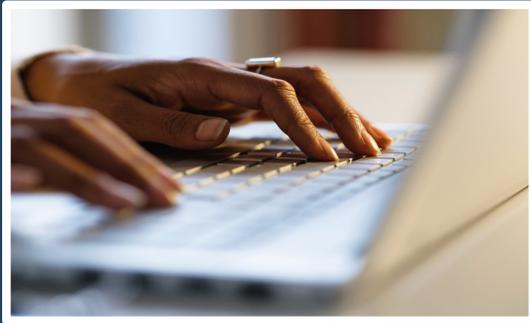
Respondents feel confident about the data being entered by their agency (4.1) but less confident of other agencies (3.4)

Data quality is a high priority for end users (4.7)
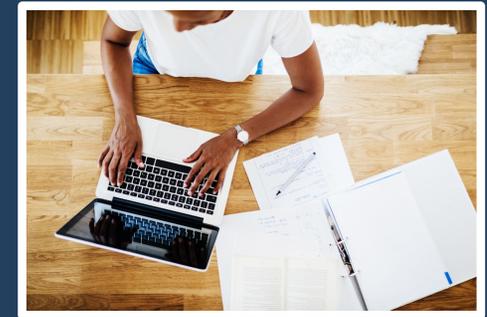
Respondents feel it's easy to enter client-level data into Clarity (3.9)

# Overall Satisfaction – End User are Satisfied with...
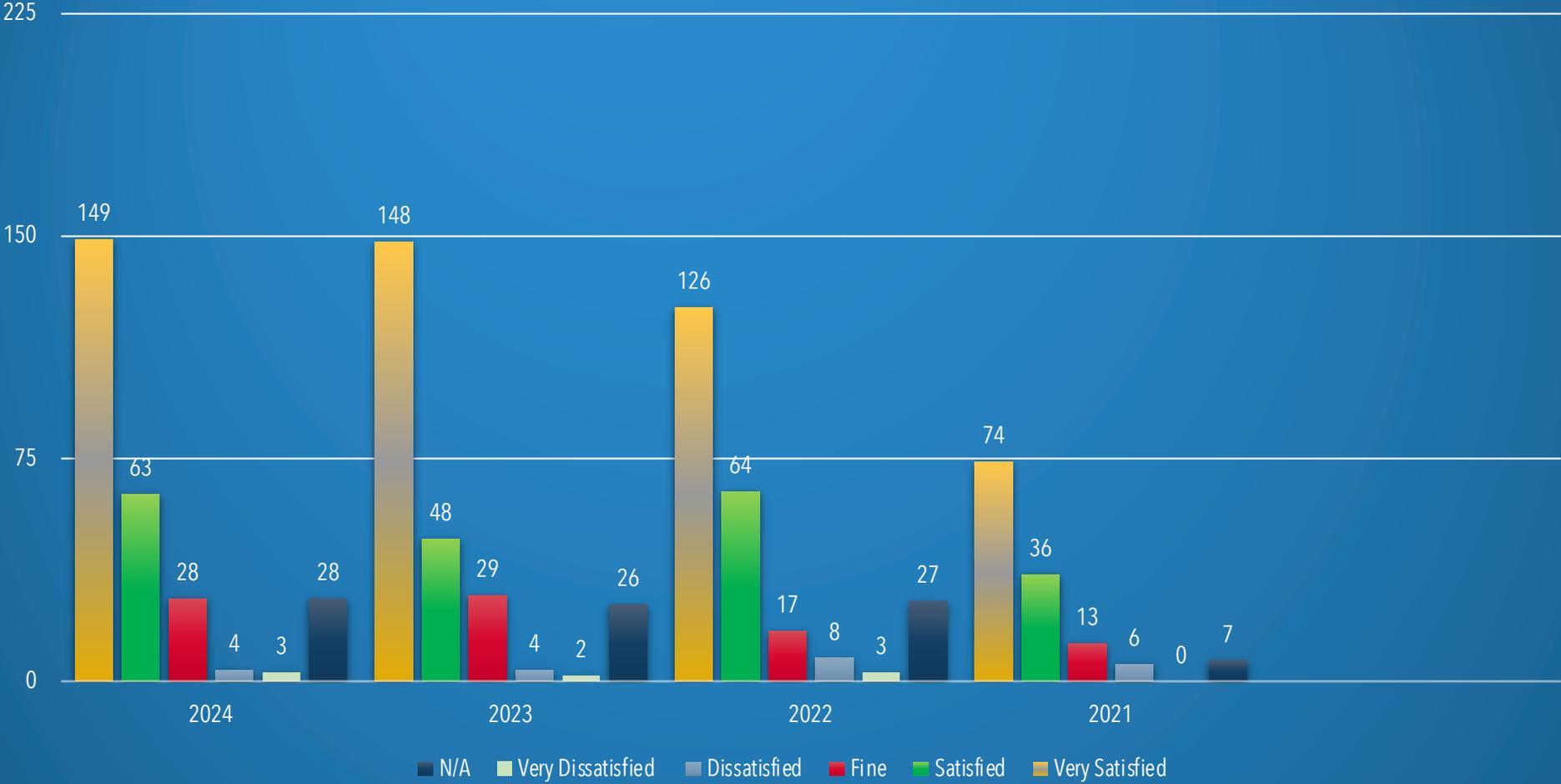
**Clarity Human Services**

**Bitfocus Help Desk**

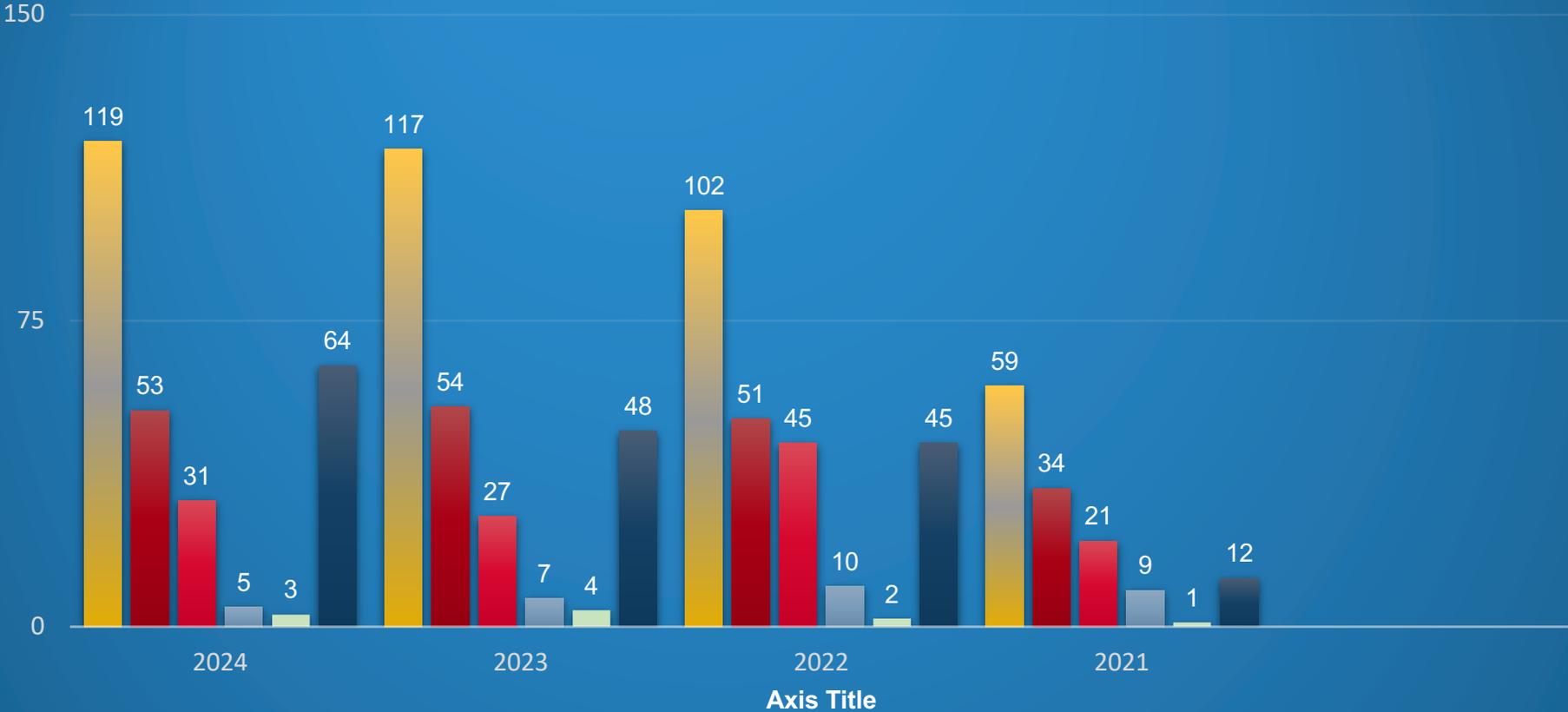**System Administration Team**

**Training Provided by Bitfocus**

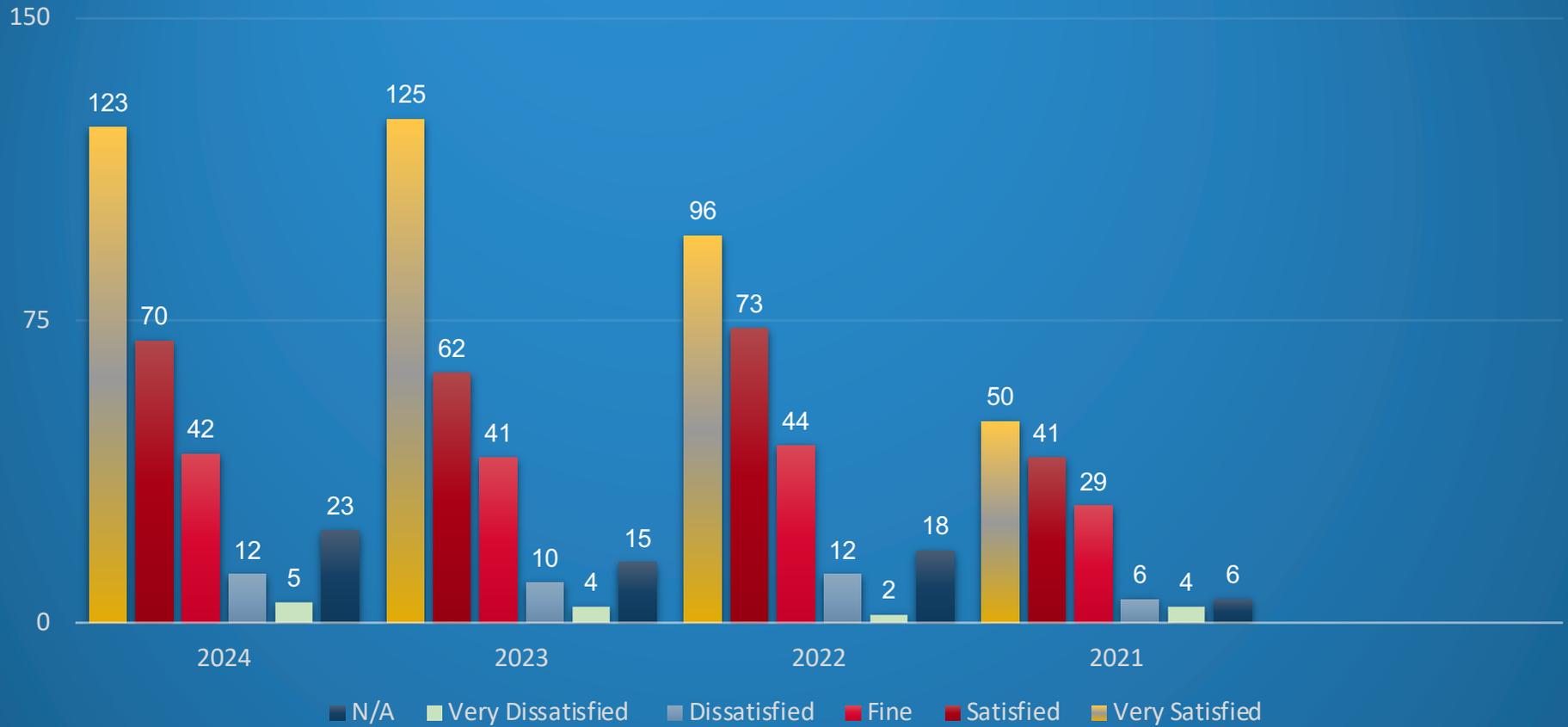**Data Engagement Workshops**

# Help Desk Satisfaction Over Time



225

150

149
148
126
74

75

63
64
48
36
28 29
28 27
26
17
13
4 3
4 2
8 3
6
0
7

0

2024    2023    2022    2021

■ N/A   ■ Very Dissatisfied   ■ Dissatisfied   ■ Fine   ■ Satisfied   ■ Very Satisfied

Bitfocus System Administration Team Satisfaction Over Time
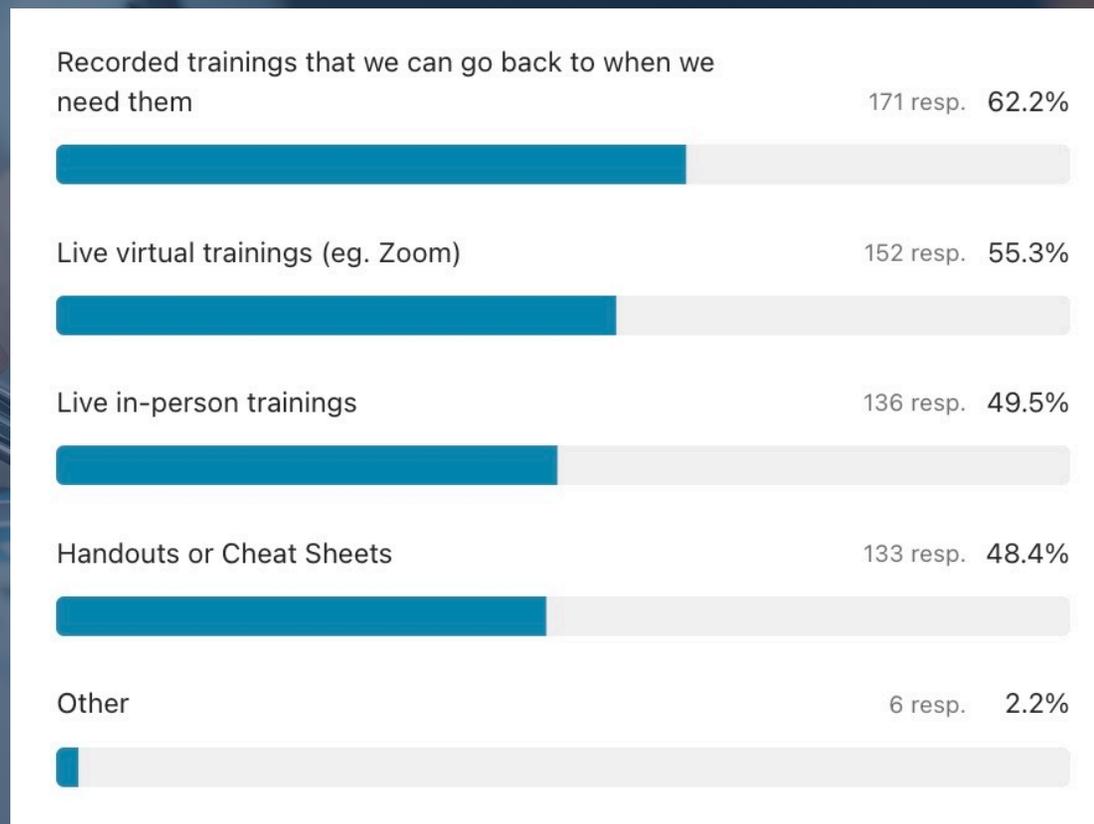
# Who do you go to when you need to learn something new?

| Response | Count | Percentage |
|---|---|---|
| Colleagues at my agency | 151 resp. | 54.9% |
| The Bitfocus HelpDesk team | 126 resp. | 45.8% |
| The Agency Lead | 96 resp. | 34.9% |
| The Bitfocus Community Administration team (Lesly and Angie) | 94 resp. | 34.2% |
| HelpCenter articles or internet search | 48 resp. | 17.5% |
| Other | 6 resp. | 2.2% |
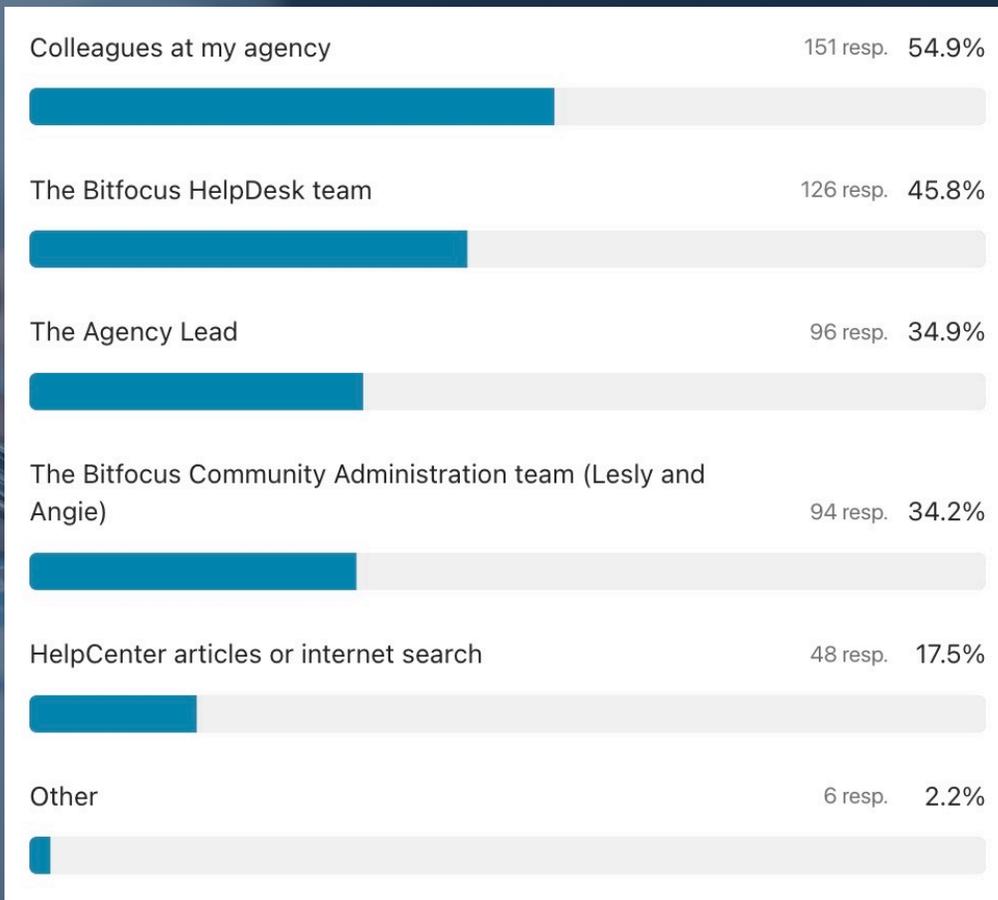
# Recommendations

**Increase number & types of training sessions in this community**

(Running reports, in-person/online, etc.)
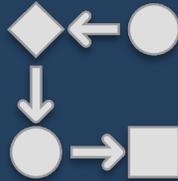
**Workflow Reconfiguration (entering data, fewer clicks, multiple at one time, etc.)**

**Create customized reports & allow for upload & auto-filling of enrollment paperwork for families instead of typing in each enrollment at a time**

**Additional options for data import and export to reduce double data entry**

# Survey Responses – What Stayed the Same

## End User Experience

Access Roles: Case Manager/Program Manager/Data Entry

2 or more years experience

Value & prioritize DQ as being important & trust data being entered by others

End Users remain satisfied with Help Desk and Admin. Team

## Using Clarity

56% "Enter data into Clarity only for clients that I work with regularly"

Program-based reports are most frequently used, HMIS Data Quality remains 2nd

Recommendation from last year includes more and different types of trainings

## Other Database

Salesforce continues to be most used comparable data system, largely for additional data points or reports

Over 50% of end users use other databases because data that needs to be captured isn't available in Clarity

# Survey Responses – What Changed?

**The type of services provided – Supportive Services moved to 1ST place on the list**

**MORE RESPONSES!**

**Data integration is increasingly important - Last year 49% (127) stated they were using another data management system compared to 49.4% (156) this year**

**Users report a need for simpler data entry & UPLIFT process**

**Also requested more and different types of training, and ability to fix errors without contacting the helpdesk**