



 **20,000**  
HOMES

**Tips & Tricks for Managing Your By-Name List in Excel & HIFIS 4  
Windsor, Waterloo & Chatham-Kent  
September 17, 2018**

## The By-Name List (BNL) Scorecard

The BNL Scorecard is a 10 question self-assessment tool to assist you to take a snapshot of your local progress towards a quality By-Name List and identify areas for improvement.

The [Canadian BNL Scorecard Guide](#) explains what the BNL Scorecard is, makes suggestions for how to use it, walks you through the questions and scoring, and provides tips and resources.

20K-Homes Campaign communities are asked to complete the [on-line BNL Scorecard](#) every quarter until they achieve a quality By-Name List.

Here are some [BNL Scorecard Group Exercises](#) and a [By-Name List Scorecard Worksheet](#) you can use with your community when you review the BNL Scorecard together.

To document your progress and/or once you have self-assessed as reaching a 10/10 on the BNL Scorecard – submit a written narrative to [marie@caeh.ca](mailto:marie@caeh.ca) – using the [By-Name List Scorecard Worksheet](#) (see sample completed worksheet [here](#)).

## BNL Tools and Sample Documents

- [By Name List Excel Templates](#) – examples you can use and customize:
  - [Sample from Guelph-Wellington](#)
  - [Sample from Hamilton](#)
  - [Sample from Peterborough](#) – links to spreadsheet and instructions
  - [Sample from Waterloo Region](#)
  - [Sample from Windsor](#)
- [Inactivity Policy – Key Considerations and Examples](#) (considerations for BNL Scorecard Question #2)
- [Coordinate Outreach Coverage – Key Considerations, Tips & Resources](#) (for BNL Scorecard Question #4)

## [By-Name List Page](#)

Community Map

Community Progress

Campaign Progress

# 20,000 HOMES CAMPAIGN

BEGINNING THE END OF HOMELESSNESS IN CANADA

JOIN TODAY!

## NOVASCOTIA

### Cape Breton

Fred Deveau / 902.539.0025 / [Email](#)

### Halifax

Claudia Jahn / 902.406.1777 / [Email](#)

## ONTARIO

### Brantford

Anthony Labatt / 519.759.3330 ext. 6247 / [Email](#)

### Brockville

Leigh Bursey / 613.342.7712 / [Email](#)

[Community  
Map](#)  
(Contact List)

# Today's Presentation By...

## Windsor



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BNL Coord.

Windsor-Essex

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## Waterloo



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## Chatham-Kent



Josh Myers  
Supervisor, Employment  
& Social Services  
Municipality of  
Chatham-Kent

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# WINDSOR-ESSEX BY-NAMES PRIORITIZED LIST

Ashley Van Der Mark — *By-Names List Co-ordinator*

Jessica Brunet — *Program Developer*

# WE Community

Windsor, ON:

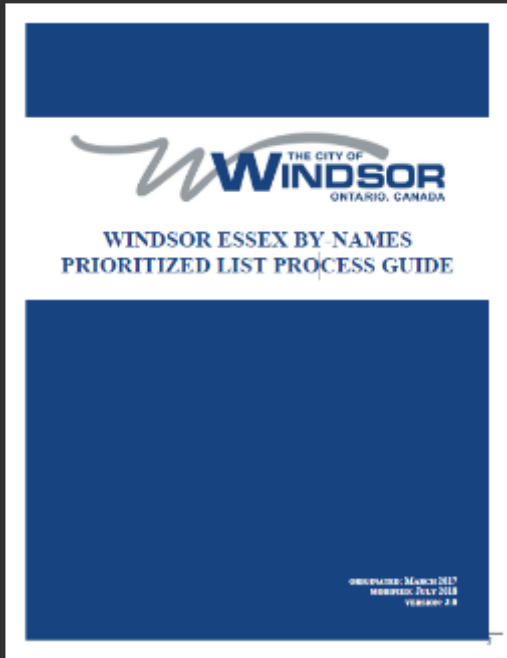
- Population – 217 188 (2016 Census)
- Urban city covering 146 km<sup>2</sup>
- Location – most Southern city in Canada
- Border city with Detroit
- Known for the automotive industry



Essex County, ON:

- Population – 181 530 (2016 Census)
- Comprised of 8 municipalities: Amherstburg, Essex, Kingsville, Lakeshore, LaSalle, Leamington, Tecumseh, and Pelee Island.
- Rural area covering 1662 km<sup>2</sup>

# WE Coordinated Access System



- Launched publically May 23<sup>rd</sup>, 2018
- 250+ staff trained across the community representing 23 agencies
- 19 community partners participate in the weekly community table meeting
- Includes shelters, youth serving agencies, Indigenous specific supports, mental health, transitional housing, and Housing First program

# Exclusively (Excellent) Excel

- Our data is exclusively in an Excel workbook and has been since February 2018

Number of individuals  
actively experiencing  
chronic homelessness

*August 2018*

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162

Number of individuals in  
database overall

*August 2018*

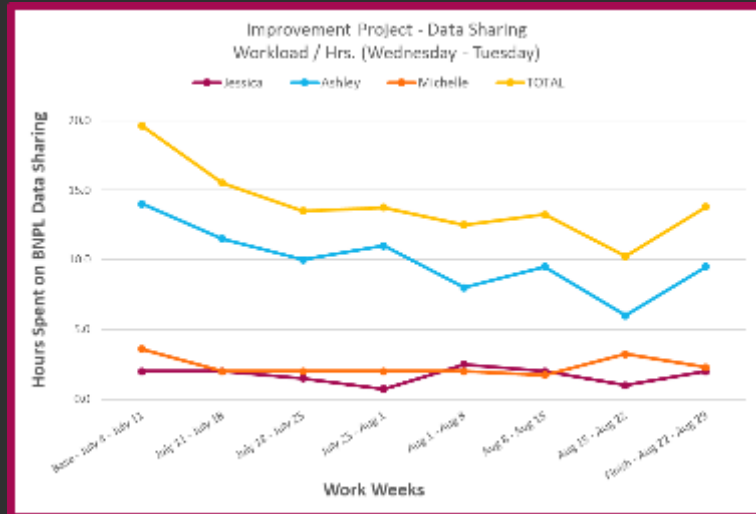
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505



# BNPL Data Sharing Team

Team Member	Data Flow	Avg. Hours / Week
Michelle	1 <sup>st</sup>	2.5
Ashley	2 <sup>nd</sup>	10
Jessica	3 <sup>rd</sup>	2



# BNPL Additions

- Secure online portal held by the Service Manager
- Training required prior to access
- Referral form, consent, and VI-SPDAT
- Duplication

Windsor Essex By-Names Prioritized List



Submit application

# Updating the BNPL

- Secure Online Portal
- Unique Identifier
- Updates are a crucial part to understanding your system!!!

**Unique Identifier \***

If unknown, please enter "N/A".

## Application

**Application Type \***

☐

New

☒

Update

**Date**

9/11/2018

☐

\* I confirm that I have written and/or provided verbal consent to disclose the information contained in this form with a variety of community stakeholders as it pertains to the Windsor Essex By-Names Prioritized List administered and managed by the City of Windsor.

☐

I withdraw my consent to disclose information contained in the Windsor Essex By-Names Prioritized List administered and managed by the City of Windsor.

**Note:** Update is selected. Only complete the fields that have changed including all required fields. If available, also include applicant's date of birth.



# Pulling & Reporting Data

## Community Needs

*Eligibility criteria columns on main tracking sheet*

*Data reliability check for Inflow/Outflow for entire population*

## Reporting to 20KHomes

*Self-populating reporting sheets;*

*Data reliability check for Inflow/Outflow for chronic population*

C25

✕

✓

*fx*

=COUNTIFS('Windsor-Essex BNPL'!CA:CA, "Chronic", 'Windsor-Essex BNPL'!BT:BT, "September", 'Windsor-Essex BNPL'!BU:BU, "2018")+  
COUNTIFS('Windsor-Essex BNPL'!CA:CA, "Chronic", 'Windsor-Essex BNPL'!BG:BG, "Newly Chronic", 'Windsor-Essex BNPL'!BX:BX, "September", 'Windsor-Essex BNPL'!BY:BY, "2018")



BNPL SPECIFIC		
<b>INFLOW</b> <i>Newly Identified</i>	How many people meeting the definition of Chronic Homelessness did your community assess for the first time during the month for which you are reporting?	5

# Tips & Tricks – Finding / Sorting

- Clear definitions and criteria are essential to making a tracker useful and efficient
- By having designated criteria (e.g. a drop down menu), it is much easier to sort accurately for information

Program Eligibility			
ACCESS / HIS WEHC - HR	FSWE WEHC - HF	<b>Jessica Brunet:</b> Eligibility (ALL): - 21 years or older - Mid acuity	
DNE	DNE	DNE	DNE
---	---	ELIGIBLE	ELIGIBLE
ELIGIBLE	---	---	---
ELIGIBLE	---	---	---
---	ELIGIBLE	---	---

Most Frequented Location	Current Sleeping Arrangements	Gender
DD	DD	DD
Windsor - South	Current Unit	Female
Windsor - Downtown	Streets/Outdoors	male
Windsor - Downtown	Hospital	male
Windsor - West	Hotel/Motel	male
Windsor - West	Incarcerated	male
Windsor - West	Shelter	male
Windsor - Downtown	Streets/Outdoors	male
Windsor - Downtown	Transitional Housing	male
Windsor - Downtown	Declined	male
Windsor - Downtown	Not Filled	Male
Windsor - Downtown	Shelter	Male
Windsor - Downtown	Couch Surfing	Female

Most Frequented Location	Current Sleeping Arrangements	Gender
DD	DD	DD
Wind	Sort A to Z	Female
Wind	Sort Z to A	Female
Wind	Sort by Color	Male
Wind	Clear Filter From "DD"	Female
Wind	Filter by Color	Male
Wind	Text Filters	Male
Wind	Search	Male
Wind	<input type="checkbox"/> Current Unit	Female
Wind	<input type="checkbox"/> Declined	Male
Wind	<input type="checkbox"/> Hospital	Female
Wind	<input type="checkbox"/> Hotel/Motel	Female
Wind	<input checked="" type="checkbox"/> Incarcerated	Female
Wind	<input type="checkbox"/> Not Filled	Female
Wind	<input type="checkbox"/> Shelter	Female
Wind	<input type="checkbox"/> Streets/Outdoors	Male
Wind	<input type="checkbox"/> Transitional Housing	Female
Wind	<input type="checkbox"/> (Blanks)	Female
Wind	OK	Male
Wind	Cancel	Female
Windsor - West	Streets/Outdoors	Male
Windsor - West	Shelter	Female
Windsor - West	Shelter	Female

# Tips & Tricks – Balancing Data

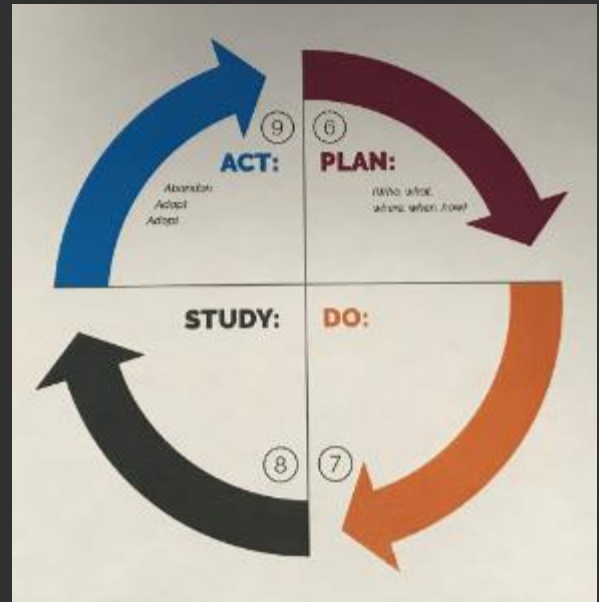
- Weekly entries are key to keeping the data process clean / manageable / time efficient
- Data balance formulas are checked after each period of data input – this make its easy to spot a mistake within 30 rows as opposed to 150 rows of data

Chronic Data Check Annual Roll Up								
Month	Actively Homeless	Placements	Moved to Inactive	Newly Identified	Returned to Active from Housing	Returned to Active from Inactive	Net Monthly Change	Balance Check
Jan-18								
Feb-18	31	0	0	31	0	0	-	-
Mar-18	36	6	0	11	0	0	5	Yes
Apr-18	131	3	0	98	0	0	95	Yes
May-18	154	2	3	28	0	0	23	Yes
Jun-18	150	4	20	20	0	0	-4	Yes
Jul-18	139	9	51	47	0	2	-11	Yes
Aug-18	162	14	6	34	0	9	23	Yes
Sep-18							-162	No
Oct-18							0	Yes
Nov-18							0	Yes
Dec-18							0	Yes

!!! FORMULAS ARE YOUR FRIENDS !!!

# WE Next Steps

- Increase provider participation
- Rent Subsidy Pilot
- PDSA....PDSA....PDSA!!!





Region of Waterloo  
COMMUNITY SERVICES

# Managing our BNL in Excel and HIFIS 4

September 17, 2018  
Ashley Coleman, Region of Waterloo



ALL ROADS LEAD TO HOME



# Waterloo Region

- Cities of Cambridge, Kitchener, Waterloo and 4 townships
- 10<sup>th</sup> largest urban area in Canada and 4<sup>th</sup> largest in Ontario
- \$14M annual funding to prevent and end homelessness



Population 583,500

# Housing Stability System

- Level 1 – Renter's Toolkit (Self-Directed)
- Level 2 – Emergency Shelters (**7 Providers**), Street Outreach (**3 Providers**), Housing Resource Centres (**1 Provider**)
- Level 3 – Shorter-Term Portable Home-Based Support (**1 Provider**)
- Level 4 – Longer-Term Portable Home Based Support (**1 Provider**), Supportive Housing (**8 Providers**)



# Context for the BNL

- By-Name List hosted in [Excel workbook](#) since June of 2015
- BNL called the Prioritized Access to Housing Support, or PATHS List
- Covers Waterloo Region in its entirety
- Started list with high acuity, then expanded from there
- Evolving state of information management
- Began implementing HIFIS 4 in March to coincide with the PiT/Registry Week
- **Currently 279 actively homeless households\***
- **Total 830 households in database** (761 individuals plus 69 families)

# Managing the BNL

- PATHS leadership and administration (1 role)
- Coordinated Access/PATHS team
- PATHS Framework
- Protocols to outline:
  - SPDAT
  - Matching and Prioritization
  - Declined Housing Offer
  - Housing Support Agreements
  - Shared Care Approach

# Keeping the BNL Live

- Additions through the Housing Support Application Form and Vacancy Matching Form
- Outreach, Shelters, Housing Resource Centres and the PATHS Team
- Use of HIFIS and Information Management
- Inactivity Protocol and Removals

# BNL Data and Reporting

- Run separate lists for Service Providers  
(Added by Acuity, Removed and Reason, No Update in 90+ Days)
- Data submission worksheet ensures accuracy, reliability, balanced data
- Monitoring and sharing progress with community

# Tips and Tricks for Managing the BNL

- Hiding information and filtering
- Use of formulas to automate and update
- Consistent use of columns and data labels
- Completing all data cleaning, sorting and updates on a weekly basis saves time
- List administration completed by one person

# Demo of Database







Every person has an affordable, suitable, and adequate home to provide the foundation to secure employment, raise a family, and build strong communities.



## Chatham-Kent's By-Name List

Presented by: Josh Myers

Supervisor, Employment and Social Services

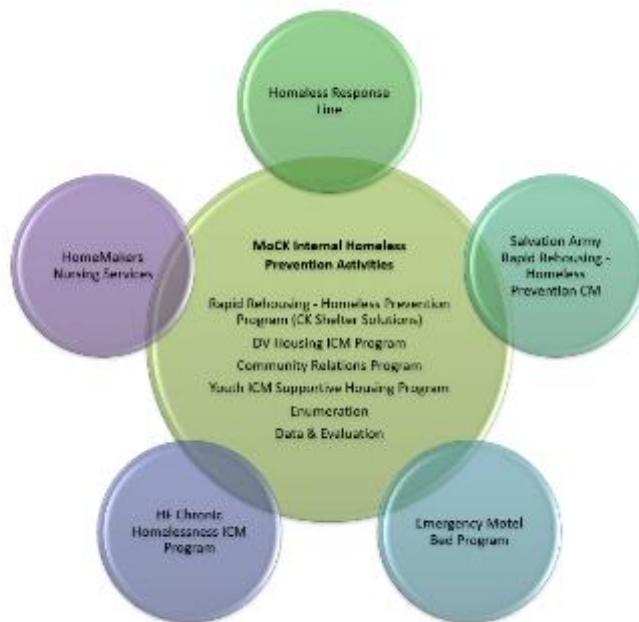


# Welcome to Chatham-Kent

- The Municipality of Chatham-Kent is a single tier urban-rural municipality in Southwestern Ontario with a population of approximately 104,000 residents.
- Chatham-Kent (CK) encompasses 23 former communities in a 2500 square km area - making it the second largest municipality in Ontario by geographic area.



# CK's Homeless Serving System



# HIFIS 4



## HIFIS / SISA

Homeless Individuals and Families Information System / Système d'information sur les personnes et les familles sans abri

### Log In / Connexion

User Name / Nom d'utilisateur



Password / Mot de passe



Service Provider / Fournisseur de services

Select an o... ▾



Log In / Connexion ➔

[Forgot Password? / Mot de passe oublié?](#)



Chatham-Kent

*Cultivating Growth, Share to Share*

Community Human Services

# Staffing and Workload

Who is responsible for reporting..

- 1 Data Lead for reporting to 20,000 homes
- 1 Admin assistant
- Series of Job aids and policies surrounding data input.

## ***Policy and Procedure***

Chatham-Kent

**Subject:** 20,000 Homes By-Name List and Monthly Move-In Report

**Purpose:** As part of Chatham-Kent's commitment to participate in the 20,000 Homes Campaign we have agreed to report an updated By-Name List each month along with a monthly Move-In List.

In order to provide accurate reporting it is crucial that staff follow the same guidelines and definitions for all clients that are presenting as homeless.

The following policy will provide definitions and procedures that are to be followed to ensure accurate reporting.

**Definitions:** **Homeless:** an individual or family who is without stable, permanent and appropriate housing. This can include couch-surfing, motels, friends and family when it is identified as being temporary and they do not have a home to return to. The client must be the one to identify their situation as being temporary.

*Ex 1. Individual is requesting next address for Son's Motel. They have been residing at Son's for years and believe they can stay as long as they would like. They express no interest in wanting to move to another location.*

- Not Homeless

*Ex 2. Individual has been living at Son's motel for 2 years. They report that they wanted to SLMs after being kicked out of apartment due to failed relationship. They don't know how long they can remain at motel as it is month to month and/or they would like to live in something they consider long term but can't afford it or haven't found housing*

- Classically Homeless

# Adding Names to the BNL

## By Name List Report for 20,000 Homes

The report displays a list of all clients who are currently homeless, and displays their housing, income, risk of homelessness, priority population, whether they are a new client within the past 30 days, how many previous housing placements they have, their VI-SPDAT score, whether they have a full SPDAT, and their phone number.

Unique ID	Client Name	DOB	Gender	Source of Income	Housing Status	Status Updated Date	Client Based	Priority Population	Newly Identified	Returning from Housing	Previous Housing Placements	VI-SPDAT Score	VI-SPDAT Caseworker	Full SPDAT
3,822	Santa Clause	1989/08/11	M	OW	Shelter	2018/07/31		Non-Aboriginal, Unknown / Not Asked	No	Yes	0	8	Williams, Dawn	
272	Michael Jordan	1982/03/26	F	OW	Shelter	2018/09/04		Non-Aboriginal, Unknown / Not Asked	No	Yes	0	10	Heard, Denise	
3,436	Serena Williams	1958/05/07	M	Canada Pension Plan (CPP)	With friends/family (paying rent)	2018/06/13		Non-Aboriginal, Unknown / Not Asked	No	No	1	8	Case Manager, Ontario Works	
3,763	Charlita Perry	1999/09/11	M	OW	Parents	2018/07/19		Non-Aboriginal, Unknown / Not Asked Youth (16 - 25)	No	No	0	3	Case Manager, Ontario Works	
2,102	Morgan Carson	2000/09/28	M		Parents	2018/08/10	Yes	Unknown, Not a Veteran Youth (16 - 25) Youth with compromised Addictions	No	No	0	12	Thomas, Maggie	
2,127	Kim Crow	1990/07/31	M		Outdoors	2018/08/03	Yes	Non-Aboriginal, Not a Veteran Youth (16 - 25)	No	No	1	14	Christian, Lisa	Yes
2,088	Josh Myers	1982/04/11	M	OW	Couch Surfing	2018/08/08		First Nations, Off reserve, Not a	No	No	0	5	Thomas, Maggie	

# Removing Names from the BNL



## 20,000 Homes Campaign

Move In Report for August 2018



### List of Move-Ins this Month

This is a list of all Housing Placements entered in HIFIS 4 that have a Move-In date in the reporting month. All Housing Placements are listed here, as are all family members in each Housing Placement, even if they do not meet the definitions of Chronic, Episodic, and/or High Acuity.

Move In Date	Chronic?	Episodic?	High Acuity?	Unaccompanied Youth?	Aboriginal?	Veteran?
August 1, 2018					Yes	
August 8, 2018						
August 1, 2018						
August 31, 2018						
August 14, 2018	Yes					
August 13, 2018						
August 2, 2018			Yes	Yes		

# Reporting to 20,000 Homes

## By Name List Report for 20,000 Homes - August

This report displays a list of all clients who are currently homeless, and displays their housing, income, risk of homelessness, priority population, whether they are a new client within the past 30 days, how many previous housing placements they have, their VI-SPDAT score, whether they have a full SPDAT, and their phone number.

Unique ID	Client Name	DOB	Gender	Source of Income	Housing Status	Status Updated	Chronic	Episodic	Priority Population	Newly Identified	Returning from	Previous Housing	VI-SPDAT Score
2,127	Santa Clause	1993/07/31	M		Outdoors	2018/08/03	Yes		Non-	No	No	1	14
2,212	Josh Myers	2001/12/31	F	OW	With	2018/07/27	Yes		Unknown, Not	No	No	1	7
3,389	Kim Crew	1985/04/09	F	ODSP	Shelter	2018/08/24	Yes		Non-	No	No	0	6
435	Steve Smith	1997/06/01	F	OW	Couch Surfing	2018/06/14	Yes		Unknown, Not a Veteran	No	No	1	5



## Walkthrough....

- I am going to spend the next few minutes taking you through our sandbox environment to show you how it works for our staff.