

# Technology Solutions: Leading with Lived Experience



Presented by: **Sketch Salazar**  
**Maureen Damrel**  
**Marti Phillips**





**Sketch Salazar**  
Board Member  
Lived Experience Advisory Board



## About the Lived Experience Advisory Board

The Lived Experience Advisory Board (LEAB) is a leadership development body consisting of members with current or past experience of homelessness. Members use this platform to learn about and evaluate the system of care and to make recommendations for improvement.

LEAB is focused on:



Fostering the development of self-determination, leadership skills, and sense of empowerment among consumers



Providing clear lines of communication between leadership, staff, and consumers to resolve issues as they arise and better anticipate future consumer needs



Creating a working partnership between consumers and providers to inform policy development and improve the quality and types of services provided



**Marti Phillips**  
Senior Project Manager  
Bitfocus



## About Bitfocus

Bitfocus, Inc. is on a mission to empower communities nationwide who are looking for better ways to use technology, data, and policy to improve their systems of care. Our HMIS platform, Clarity Human Services, is a powerful tool that connects your community's most vulnerable populations to the most effective services and resources available to them—all while streamlining the service provider workflow and providing the analytics necessary to support informed decision-making.

## About Destination: Home



**Maureen Damrel**  
Senior Initiatives Officer  
Destination: Home



## A Public-Private Partnership Ending Homelessness in Santa Clara County



*Our work is grounded in a commitment to advancing racial and socioeconomic justice, and delivering real solutions that will deliver true systemic change.*

# Pilot Program Partners





# Agenda

- Opportunity for Change
- Technology Solution
- Shift in Process
- Insights and Lessons Learned
- Looking forward
- Q&A

# Opportunity for CHANGE



TECHNOLOGY NEEDS  
ASSESSMENT OF THE  
SANTA CLARA COUNTY  
SUPPORTIVE HOUSING  
SYSTEM

PREPARED BY HOMEBASE AND VIZTRIC

JANUARY 2019

Access to technology is now a basic need in our society, but for our neighbors experiencing homelessness, it can be hard to come by.

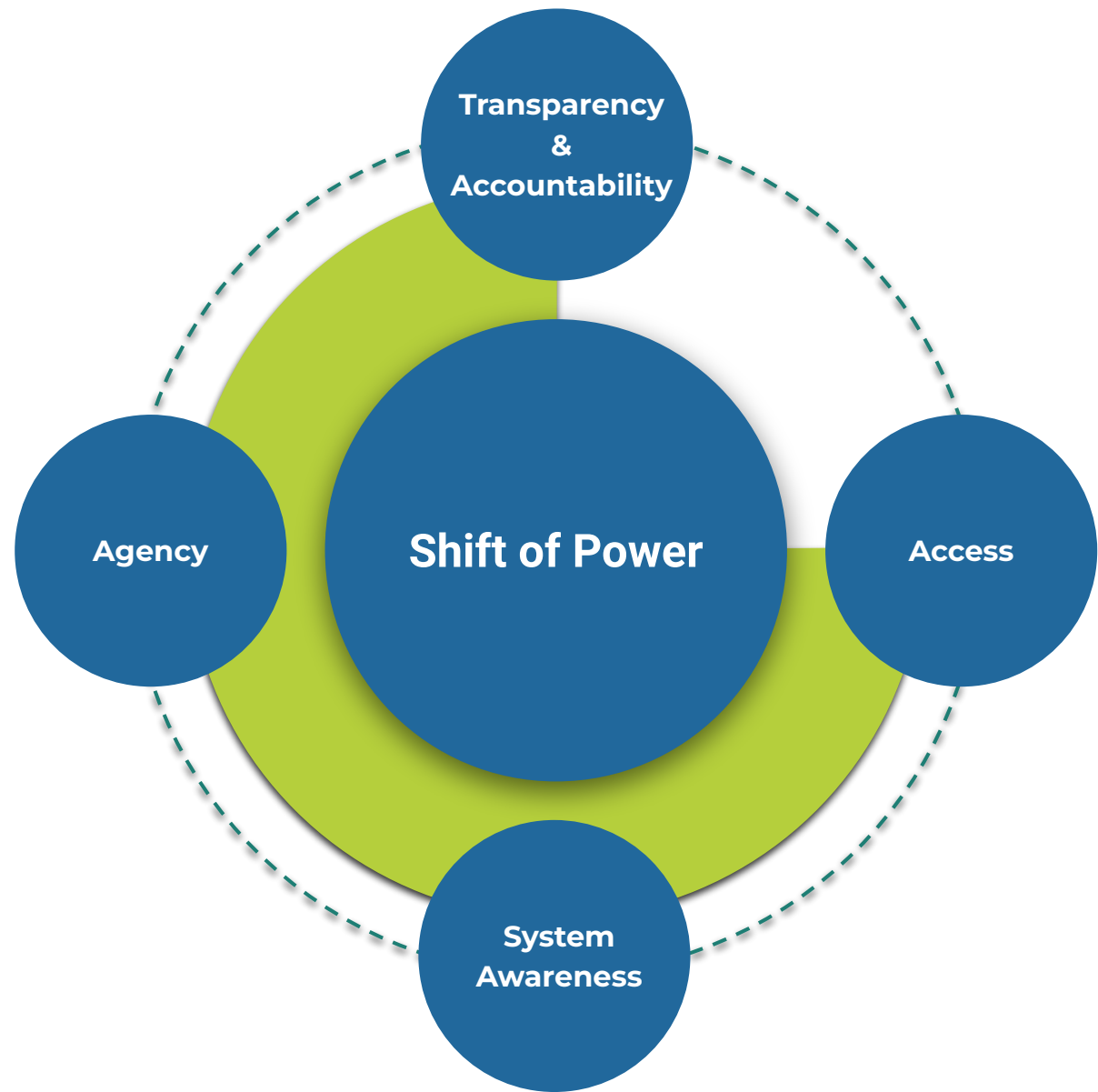
# Needs Identified in the Assessment

- Provider Capacity & Infrastructure
- Data Collection & Integration in Homeless Management Information System (HMIS)
- Reporting Analytics & Data Sharing
- **Client Engagement & Access to Technology**



# Commitment to System Change:

Access + Equity





# Technology Solutions

A photograph showing a homeless encampment in a park-like setting. Several tents and makeshift shelters made of tarps are set up under the shade of large, mature trees. A chain-link fence runs across the middle ground, separating the encampment from a residential area with houses and trailers in the background. The ground is dirt and littered with some debris. The scene is brightly lit, suggesting a sunny day.

NHSDC Fall 2022 Conference | Seattle

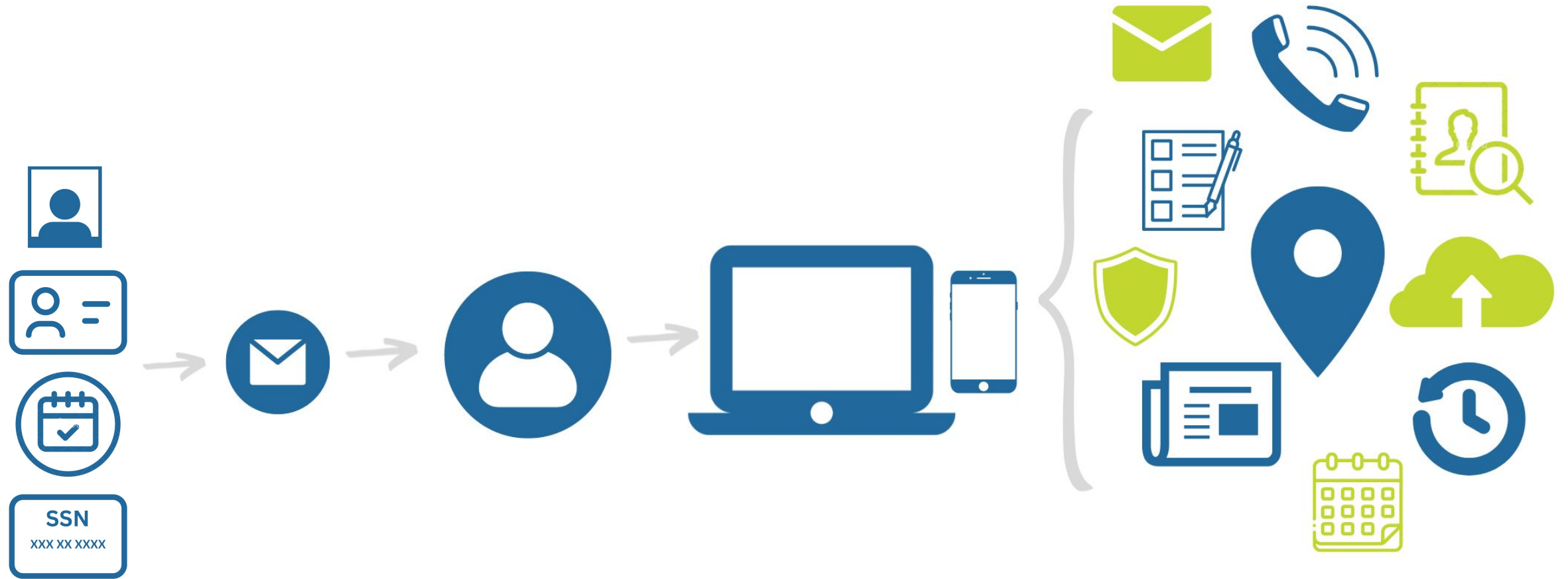


# HMIS Customer Portal

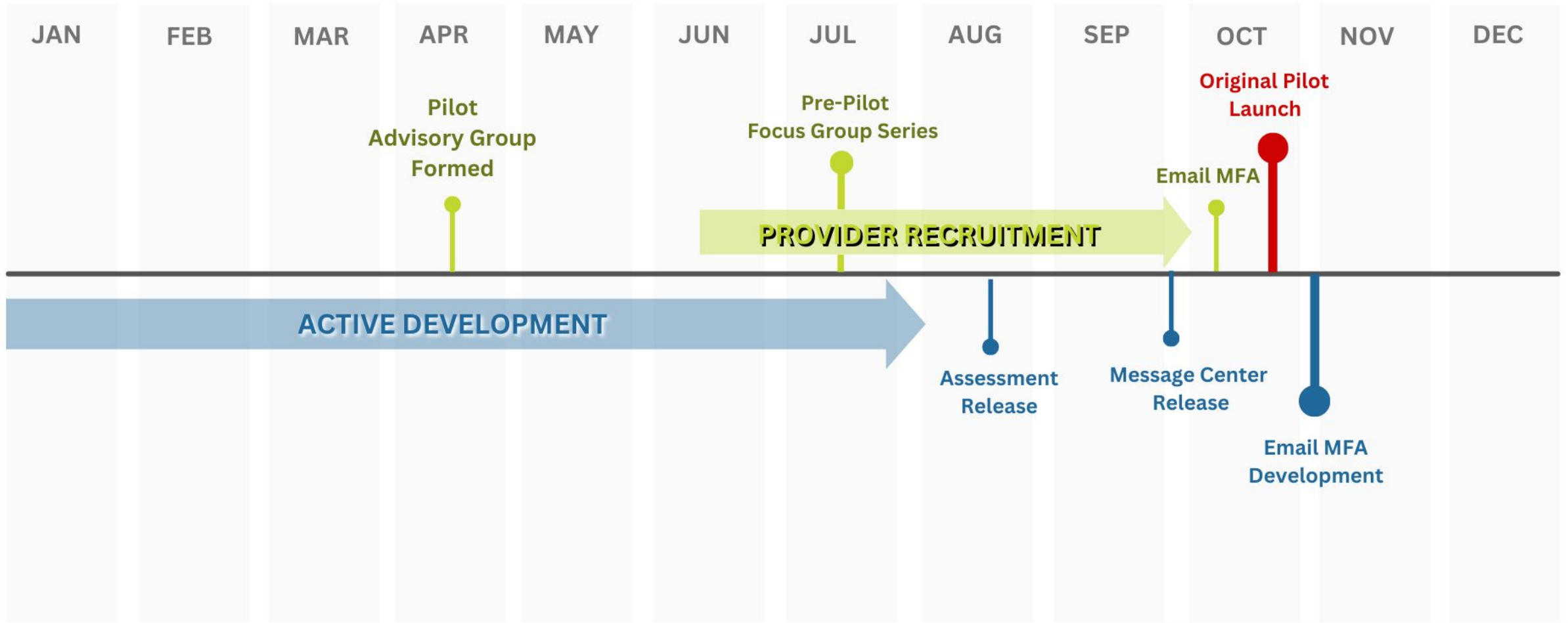
	ACCESS	<ul style="list-style-type: none"><li>• Low barrier access methods</li><li>• Optimized for mobile use</li><li>• ROI Management</li><li>• Message Center</li></ul>
	ACCOUNTABILITY & TRANSPARENCY	<ul style="list-style-type: none"><li>• Real-time connection to HMIS record</li><li>• Activity &amp; History</li><li>• Assessment Management</li></ul>
	AGENCY	<ul style="list-style-type: none"><li>• Location &amp; Contact Updates</li><li>• Documentation Repository</li><li>• Appointment Management</li></ul>
	SYSTEM AWARENESS	<ul style="list-style-type: none"><li>• Resource directory with proximity features</li><li>• Community news &amp; articles</li><li>• Banners &amp; notifications</li></ul>



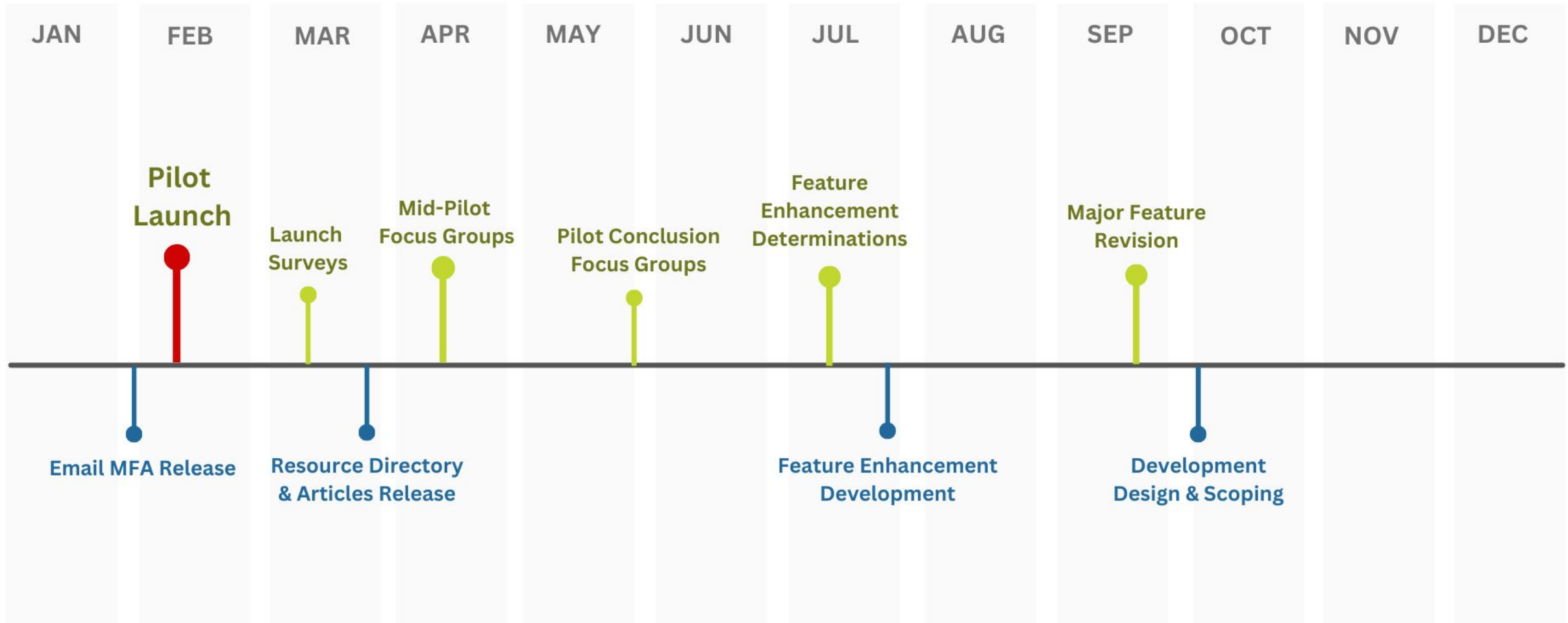
# Customer Portal Overview



# Year 1 | 2021



## Year 2 | 2022







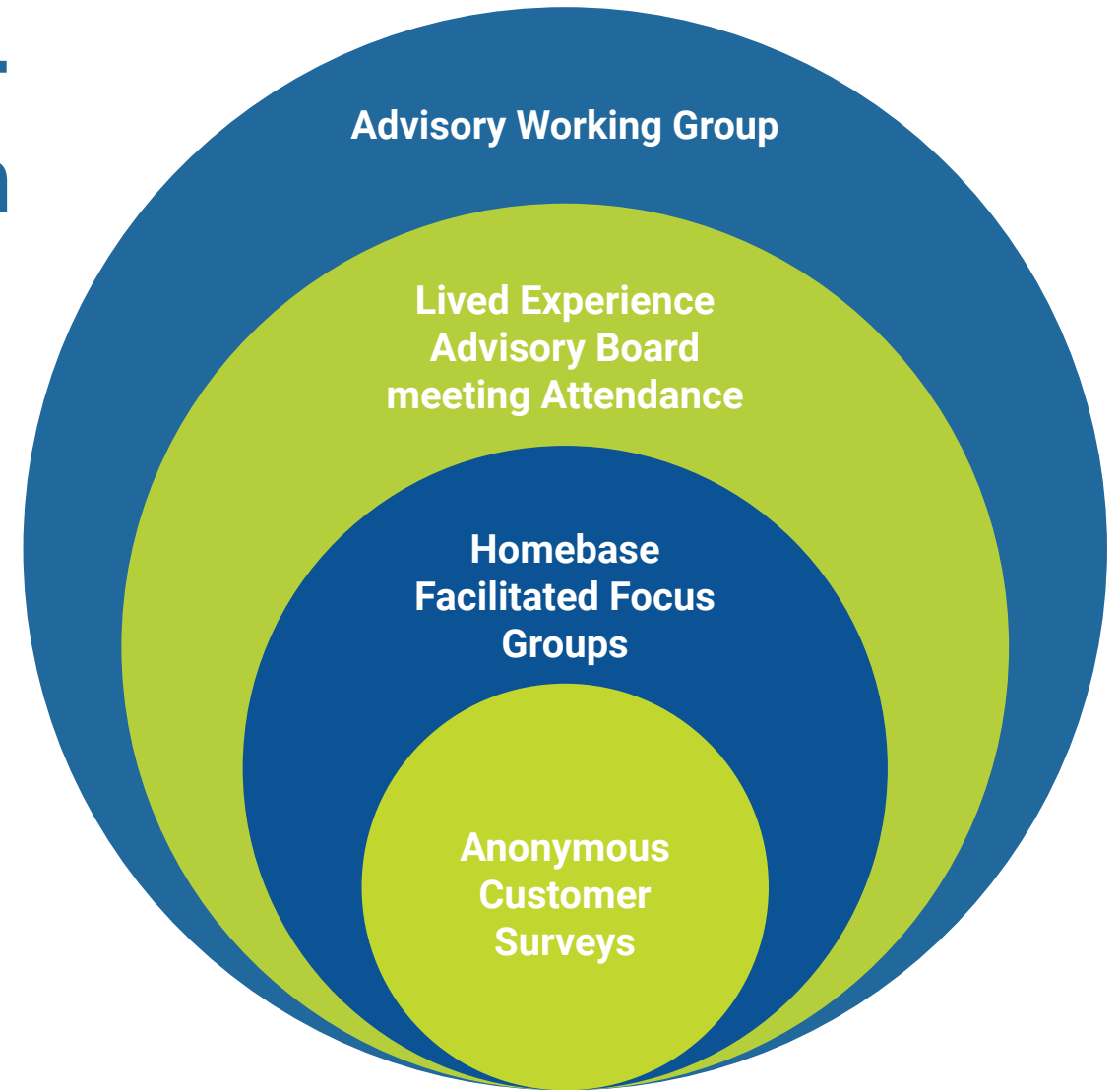
# Shift in Process



- Questions & Insights
- Desire for deeper engagement
- Follow-up on feedback-based changes



# Creating Safe Spaces + Providing Compensation



## Anonymous Customer Surveys

- Low-risk
  - Fear of retaliation
- Low-barrier
  - Anytime
  - Inside/ outside portal

## Homebase Facilitated Focus Groups

- Facilitated by 3rd party and Lived Experience
- Safe space & Anonymous results
- Trusted & experienced community partner

## **Lived Experience Advisory Board Meeting Attendance**

- Streamlined information dissemination
- Open invitation for engagement
- Answer concerns

## **Advisory Working Group**

- LEAB members, County staff, Bitfocus staff, D:H staff, & other stakeholders
- Safe space for critiques and ideas
- Consistent & active engagement

# Customer Portal Pilot Objectives

Model use of the Customer Portal on a small-scale in order to define the community workflow process, useability, and value to clients for expansion to all of Santa Clara County.





# About the Pilot



Four Month Pilot Period



Santa Clara County Homeless Service Providers



Individuals over the age of 18 providing consent to participate



Training & technical support for providers & clients



Feedback opportunities available throughout pilot

# Pilot Results & Insights



Reduce Access Barriers Through  
Email Multifactor Authentication



Include Scheduling & Calendar Integration



Introduce Client-Initiated Actions



Access Points for Clients Not Connected to Services



More Client Control for Location Sharing

# Lessons Learned

- Leading with Lived Experience
- Co-Design
- Willingness to Change Course







**Leading With  
Lived Experience**

**Identifying Barriers**



# Barrier: Technology Access and Comfort

- Lack of access to technology
- Unstable and/or unreliable wifi connection
- No guaranteed power source



# Barrier: State of Crisis

- Inability to focus and comprehend
- Survival mode
- Lack of safety
- Mental Health challenges
- Addiction

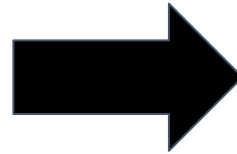
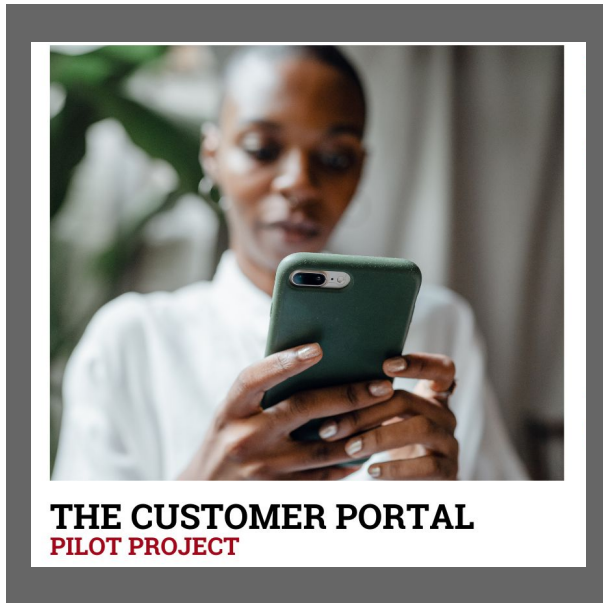




## Barrier: Product Testing and Training

- Training videos with computer view
- Reliance on staff for training
- Development of training materials

# Barrier: Industry Standards



**Help Improve Your Housing Support Services Through The Santa Clara County HMIS Customer Portal Pilot**



Are you currently experiencing homelessness or receiving housing-related supportive services in Santa Clara County? If so, the Homelessness Management Information System(HMIS) Customer Portal allows you to be more hands-on in your housing journey.

- Use images people can identify with
- Use engaging & vibrant colors

# Use more concise & familiar language

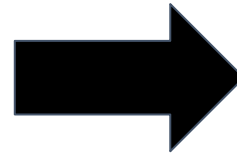
## THE CUSTOMER PORTAL PILOT PROJECT

### What is the Portal?

- The Customer Portal is a secure website connected to Clarity Human Services, Santa Clara County's Homeless Management Information System (HMIS). HMIS is a local information system used to collect and store your personal information and service history so that providers can better understand your needs and match you to appropriate resources.
- The Portal allows you to communicate with providers, share information, and learn about community resources. Through the Portal, you can also access and update some of your information stored in Clarity Human Services.
- The Portal was built in collaboration with individuals with current or past lived experiences of homelessness in Santa Clara County.
- The tools available through the Portal are designed to give you more access to information and resources in your journey to permanent and stable housing.
- The Portal Pilot is a testing period for you to use and explore the Portal and its tools. Your feedback will help us improve the Portal, our processes, and plan for rolling it out to the whole community!

### How can it help me?

Using the Portal, you can quickly update and share your location with service providers, update your personal contact information any time it changes, send messages to your care team, upload documentation, and so much more! The Portal gives you more control over the housing process to the providers and resources available in your reating an account today!



Are you currently experiencing homelessness or receiving housing-related supportive services in Santa Clara County? If so, the Homelessness Management Information System(HMIS) Customer Portal allows you to be more hands-on in your housing journey.

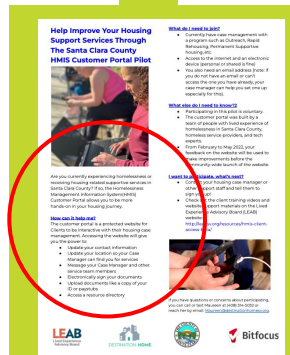
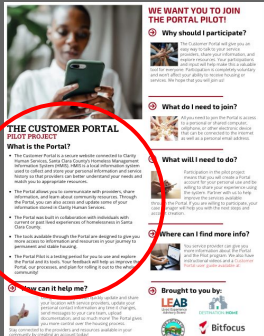
### How can it help me?

The customer portal is a protected website for Clients to be interactive with their housing case management. Accessing the website will give you the power to:

- Update your contact information
- Update your location so your Case Manager can find you for services
- Message your Case Manager and other service team members

Electronically sign your documents  
Upload documents like a copy of your ID or paystubs

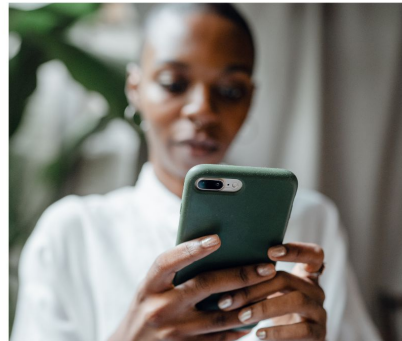
Access a resource directory





# Original

# Modified



## WE WANT YOU TO JOIN THE PORTAL PILOT!

### Why should I participate?



The Customer Portal will give you an easy way to talk to your service providers, share your information, and explore resources. Your participations and input will help make this a valuable tool for everyone. Participation is completely voluntary and won't affect your ability to receive housing or services. We hope that you will join us!

### What do I need to join?



All you need to join the Portal is access to a personal or shared computer, cellphone, or other electronic device that can be connected to the internet as well as a personal email address.

### What will I need to do?



Participation in the pilot project means that you will create a Portal account for your personal use and be willing to share your experience using the system. Partner with us to help improve the services available through the Portal. If you are willing to participate, your case manager will help you with the next steps and account creation.

### Where can I find more info?



Your service provider can give you more information about the Portal and the Pilot program. We also have instructional videos and a [Customer Portal user guide](#) available at:

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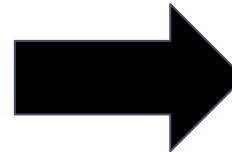
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Stay connected to the providers and resources available in your community by creating an account today!

### Brought to you by:



## Help Improve Your Housing Support Services Through The Santa Clara County HMIS Customer Portal Pilot



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- Upload documents like a copy of your ID or paystubs
- Access a resource directory

### What do I need to join?

- Currently have case management with a program such as Outreach, Rapid Rehousing, Permanent Supportive housing, etc.
- Access to the internet and an electronic device (personal or shared is fine)
- You also need an email address (note: if you do not have an email or can't access the one you have already, your case manager can help you set one up especially for this).

### What else do I need to know?

- Participating in this pilot is voluntary.
- The customer portal was built by a team of people with lived experience of homelessness in Santa Clara County, homeless service providers, and tech experts.
- From February to May 2022, your feedback on the website will be used to make improvements before the community-wide launch of the website.

### I want to participate, what's next?

- Contact your housing case manager or other support staff and tell them to sign you up!
- Check out the client training videos and website support materials on the Lived Experience Advisory Board (LEAB) website:  
<http://leabsc.org/resources/hmis-client-access-beta/>



If you have questions or concerns about participating, you can call or text Maureen at (408) 314-5032 or reach her by email: [Maureen@destinationhomes.org](mailto:Maureen@destinationhomes.org).





# Co-Design

- **Why:** To shift power
- **Who:** People with Lived Experience, Service providers & Tech partners
- **What:** Designing things *with* people not for people
- **When:** Ideation, Development, Testing, Release



# Willingness to Change Course

- Set & communicate a strong plan:
  - Establish feedback loops
  - Emphasize meaningful opportunity
  - Timely response
- Expect change
- Adapt accordingly



# Looking Forward



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**Your Challenge:**

**Step Back, Empower & Strengthen**

**Thank you**