



Delivery of Evidence-Based Human Service Programs

Innovative Solutions for Data Management and Evaluation of County, City & Community Collaboratives in Sonoma County

CWDA Conference, October 8, 2020



Open door to connect...



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Three session takeaways

- Understand the core elements of Upstream Investments, SCHSD's unique model that supports the County and community partners to create, implement and scale programs that address the root causes of poverty in a cost-effective way.
- Understand how APRICOT, a low-cost, easy to adopt data management system, is helping Sonoma County with cross collaboration among social service agencies and housing providers for a more holistic approach to service delivery.
- Identify potential program areas where APRICOT or an APRICOT like system could be of benefit to your social service delivery network.

Upstream Investments



Upstream believes that organizations with **effective practices and programs** have the highest potential to improve **education, health and economic wellness** for all Sonoma County residents.



Adult and Aging Services



Empower, Support, Protect

Human Services Department
COUNTY OF SONOMA

Economic Assistance Division



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Human Services Department
COUNTY OF SONOMA

Employment and Training Division



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COUNTY OF SONOMA

Family, Youth and Children's Services



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COUNTY OF SONOMA

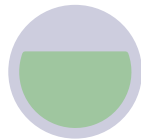
Upstream Investments



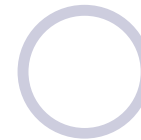
Invest



EARLY



WISELY



TOGETHER

Adult and Aging Services



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How much did we **invest**?

How much did we **do**?

How much did it **matter**?

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Shared Measurement



“There are **strong** views among important stakeholders that a shared data system to track program outcomes **will never be feasible**. Objections include: **cost**, the **inability to link data across multiple systems, privacy issues**, Community Based Organization (CBO) **resistance**, and the data entry **burden on CBOs**. Despite the Shared Outcomes Working Group recommendations, there is serious lack of consensus on the value of such a shared data system, and other interviewees pointed to multiple reasons not to pursue this plan. The reasons are:Sonoma does not have sufficient resources; the hurdle of correctly linking individual records across different databases will stymie the effort; even if records can be linked successfully, privacy issues are a stumbling block; CBOs will not want to participate; and yet another data system will mean that providers already burdened with data tasks will have to undertake additional data entry (and duplicate data entry is already a problem).”

They said **it couldn't be done...**

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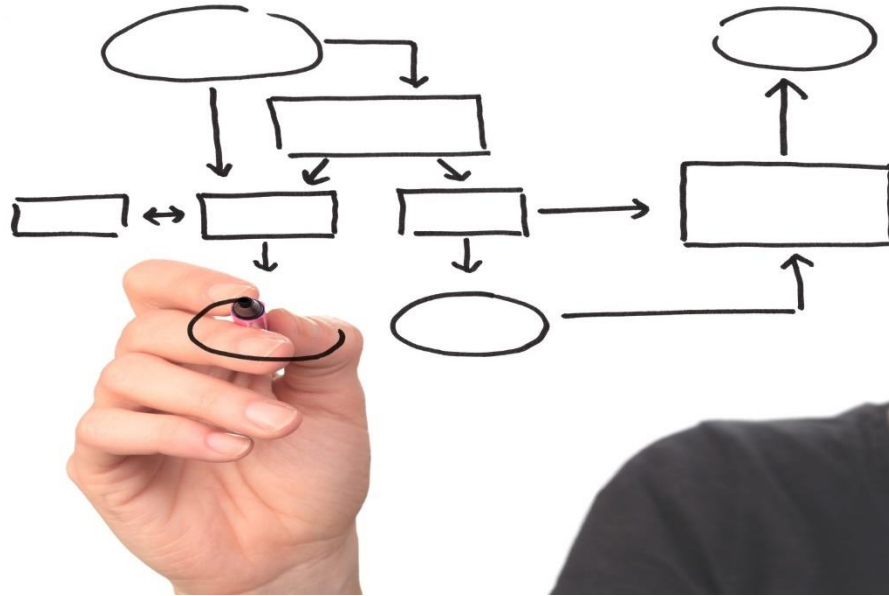
Family, Youth and Children's Services



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Upstream Investments



you set a bold **vision** to try anyway.

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\$217,007 Annually



- ✓ **300** Users
- ✓ **21** Programs
- ✓ **3** Human Service Department Divisions
- ✓ **26** Non-profit Partners
- ✓ **2** County Departments
- ✓ **1** City (City of Santa Rosa)

Project Spotlight: Housing Support Program (HSP)



Before Apricot – 2 hours leading up to the report



After Apricot – 30 minutes leading up to the report

Apricot - \$217,007 Annually



Keeping Kids in School
Sonoma County Probation Department



Family, Youth & Children
SONOMA COUNTY HUMAN SERVICES



THE SANTA ROSA
VIOLENCE
PREVENTION
PARTNERSHIP



Key to Success:

Participation between public & private sectors

Co-investment in HSD through technology grant

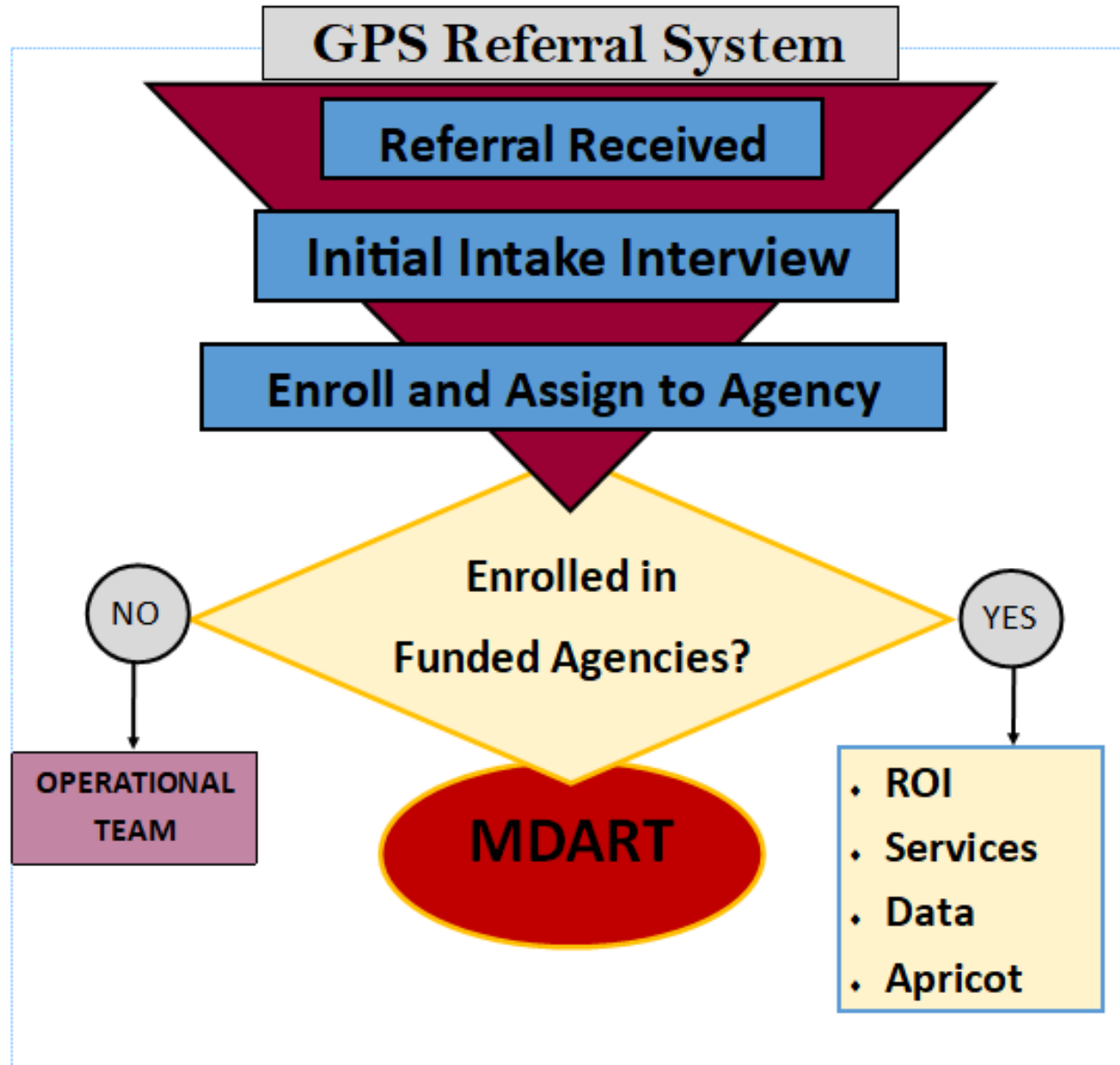
Data sharing for Improved child/family interventions





THE SANTA ROSA
VIOLENCE
PREVENTION
PARTNERSHIP

Guiding People Successfully



Collective Impact: Systems Change



- Common Agenda
- Continuous Communication (MDART, Apricot)
- Shared Measurement System (measures, forms, Apricot)
- Real Time Case Notes and Activities
- Wraparound Case Management

APRICOT



Individual-level data

- Ability to customize data elements and metrics collected on each individual by program
- Requires release of information to create a participant profile.
- Ability to initiate and accept referrals from funders and partners
- Efficient way to track youth & families receiving services from multiple organizations
- Real Time Wraparound Case Management Tool

< Fake Participant

DOCUMENT FOLDER OVERVIEW LINKS

All Documents

- + VPP - Referral (1 record)
- + VPP - Referral Assignment (4 records)
- + VPP - Intake Form (12 records)
- + VPP - Service Provider Activity (0 records)
- + VPP - Quarterly Activity Tracking (2 records)
- + VPP - Participant Update (0 records)
- + VPP - Closure Form (2 records)

APRICOT



- **Event-level data**

Efficient, user friendly way to track one-time meetings and events

- **Cohort-level data**

Efficient, user friendly way to track cohorts enrolled in a program over a certain time period.

- **Narrative/Qualitative data**

Narrative form developed to collect qualitative data on program success, challenges, etc. APRICOT also has capacity to capture case management notes and other qualitative information.

VPP - Event

Main ▾

*Event Name 

*Event Date 

*Agency

 ▾

This field is required.

*Funding Source

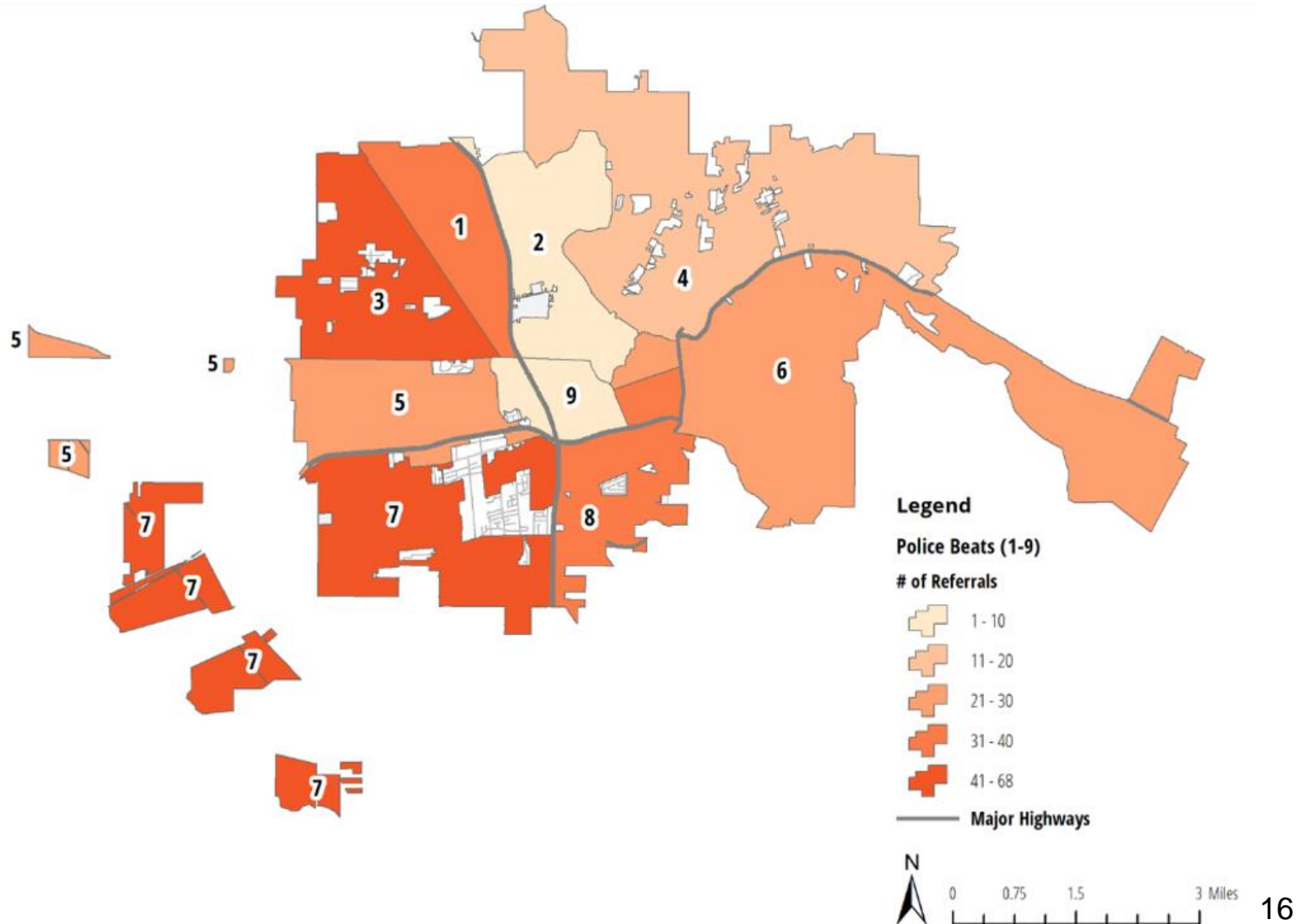
CALVIP

CHOICE

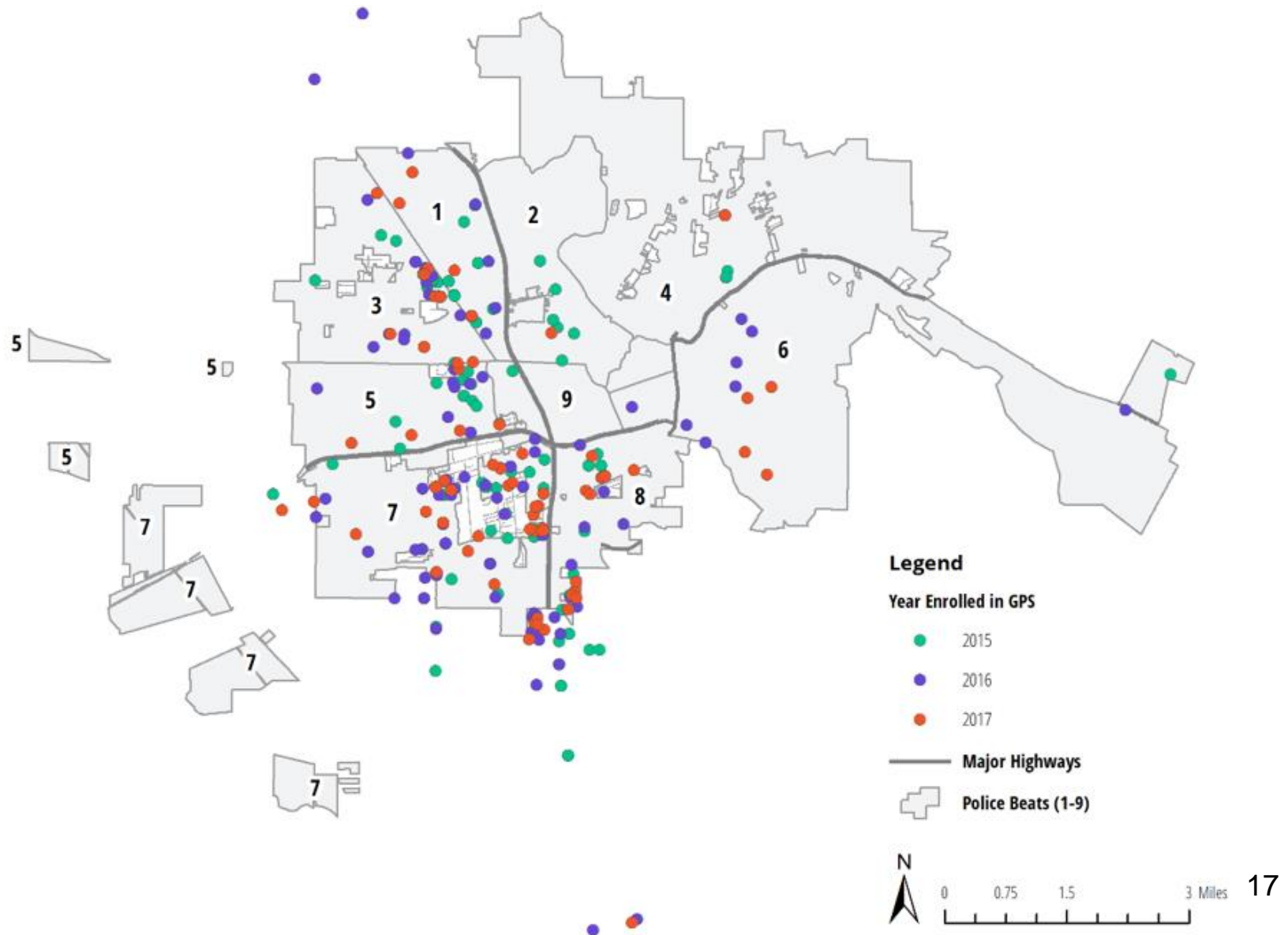
Total Youth/Children

Total Adults

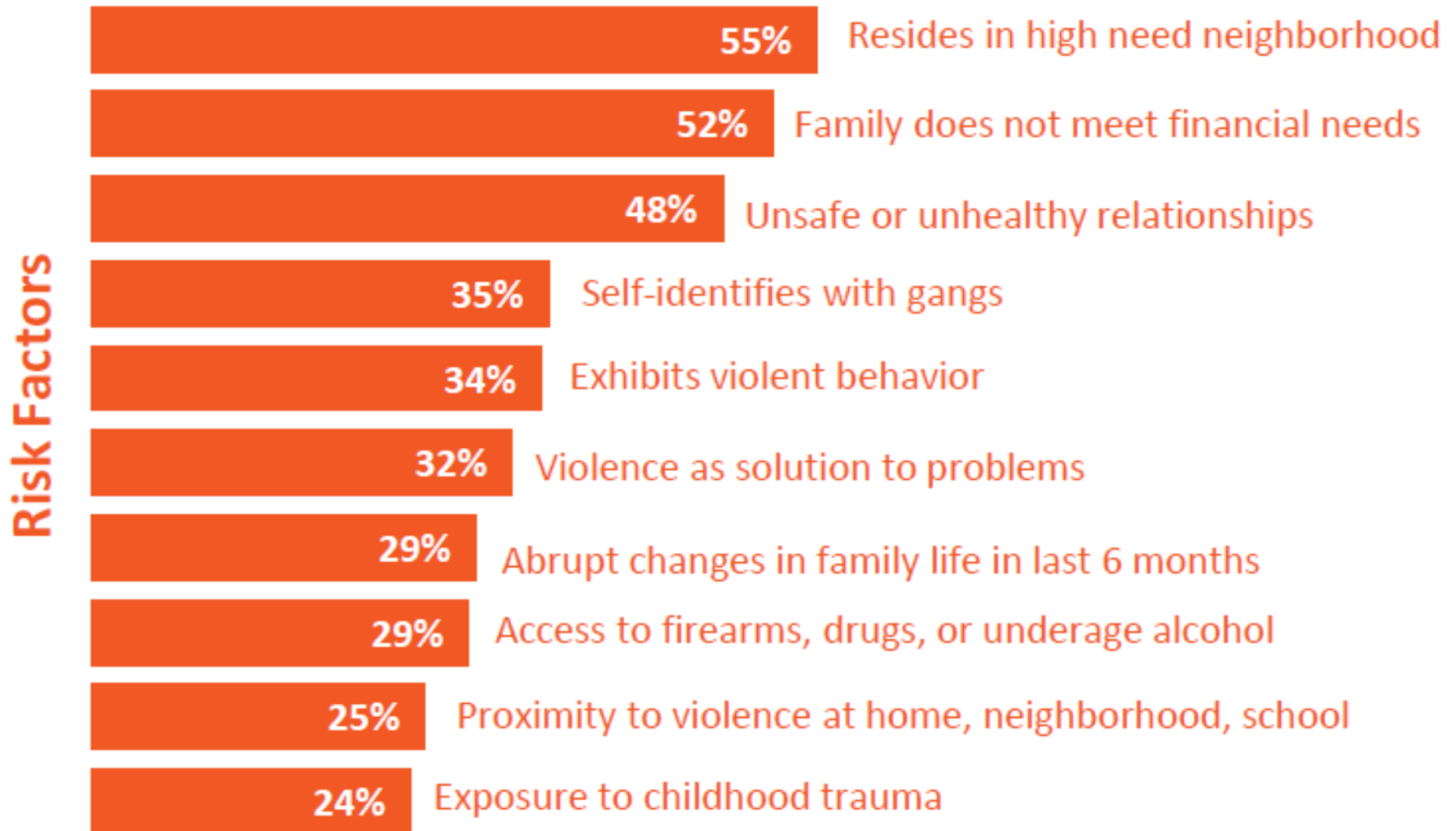
Data and Outcomes: GPS Referrals



Data and Outcomes: GPS Enrollments



Data and Outcomes: Risk Factors



Data and Outcomes: Risk Factors



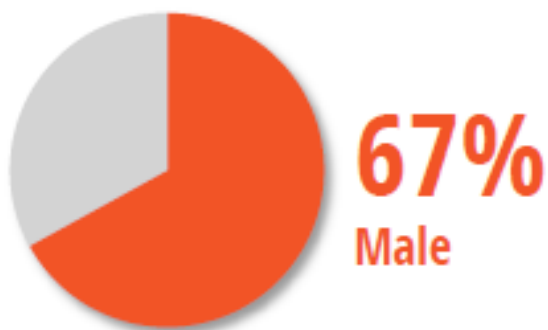
Protective Factors



Data and Outcomes: Recidivism Study



Sample Demographics (95 Youth)

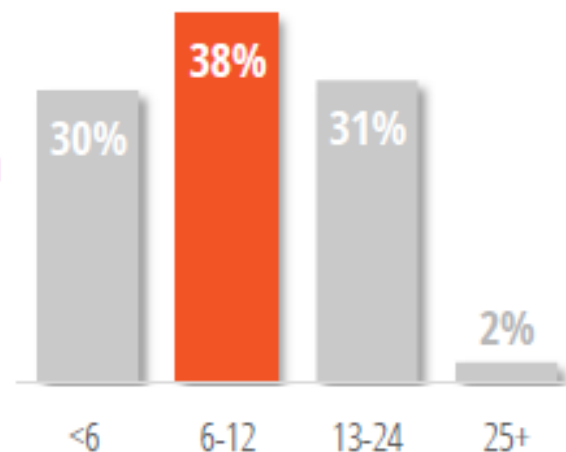


91% Hispanic/Latino



Length of Enrollment in GPS

38% of sample youth participated in GPS for 6-12 months.



GPS Services Received

2,672 Services Received

Almost half (41%) of sample youth received between 20-39 services each.

Data and Outcomes: Recidivism Study



Probation Findings

58% (55 youth)

No offenses before, during, or after GPS

82% (78 youth)

No new or more severe offense during or after GPS

88% (84 youth)

No new offenses after GPS

GPS Program Objective

75% of youth participating in GPS will not have an additional offense during the 3-year program.

12% (11 youth)

New offenses after GPS

90% were male

88% were Hispanic/Latino

64% received fewer than 20 services

46% were enrolled for <6 months

Employment
&
Training

Sonoma County
Job Link

 **SonomaWORKS**
WORKING TOWARD A BETTER FUTURE



"Empower. Support. Protect."

Human Services Department
COUNTY OF SONOMA

SonomaWORKS Housing Support Program (HSP)



Housing Support Program Overview

- CDSS funded grant to provide assistance to CalWORKs clients in need of permanent housing supports
- HSD brought program in house July 2019 to enhance our abilities to provide wrap-around supportive services that meet the needs of our families
- Staff includes Program Coordinator; four Employment & Training Counselors; Office Assistant; Housing Locator (CDC); Domestic Violence Advocate (YWCA)
- APRICOT used as referral/case management, data & outcomes tracking tool for housing and other supportive services



Housing Support Program Initial Goals

- Create a customized case management system that will assist case managers with everyday requirements of the caseload
- Create a customized program that can pull reports and data as required by CDSS
- Create reports that highlight the cross collaboration and extensive services provided to those that seek housing services
- Move away from hand-ticking and Excel spreadsheets

APRICOT-Caseload at a Glance



Browser: https://apricot.socialsolutions.com/document/search/form_id/239

hsdportal.schsd.org | HSP Case

MENU | apricot | MY APRICOT | Site Default Program HSP | CHANGE | Michelle Bendyk Sonoma County

HSP Case

EXPAND ALL

HSP Case Search

-- Add Search Field -- | Browse All

Showing 1 - 20 of 81 matching HSP Case records (0.14 Seconds) Fewer Columns...

Referral Date	CalWIN Case Number	Link individuals to the case	Name of Head of Household	Primary Phone	Request St
06/02/2018		0 links			Approved
01/22/2019		0 links			Approved
06/10/2019		0 links			Approved
06/28/2019		0 links			Approved
08/12/2019		0 links			Approved
08/15/2019		2 links			Approved
08/26/2019		0 links			Approved
09/13/2019		1 links			Approved
09/16/2019		0 links			Approved
10/02/2019		0 links			Approved
10/10/2019		0 links			Approved

Search Actions

- New HSP Case
- Clear Search History

Favorite Lists

-- Select Favorite List --

Favorite Details

Windows Taskbar: Type here to search | 1:23 PM 9/16/2020

Case Activity



Browser address bar: <https://apricot.solutions.com/profile/index/id/784767/overview>

Page Header: **apricot** | **MY APRICOT** | Site Default Program HSP | CHANGE | Michelle Bendyk, Sonoma County

Left Sidebar Menu:

- Dashboard
- Search Records
- My Apricot Tools
- COVID Resources
- Help Center
- Submit an Idea
- Resource Center 1

Recent Activity

Past 10 Actions

DATE	CREATED BY	DOCUMENT ACTIVITY
09/03/2020	Jackie Leon	Housing Placement Created
09/03/2020	Jackie Leon	Housing Placement Created
09/03/2020	Jackie Leon	Habitability Standards Inspection Checklist Created
09/03/2020	Jackie Leon	Housing Placement Created
09/03/2020	Jackie Leon	Case Notes Created
09/03/2020	Jackie Leon	Financial Assistance Obligation Created
09/03/2020	Jackie Leon	Financial Assistance Obligation Created
09/03/2020	Jackie Leon	Financial Assistance Obligation Created
09/03/2020	Jackie Leon	Housing Plan Created

Customized Reports



The screenshot shows a web browser window with the URL <https://apricot.socialsolutions.com/report/list>. The application interface includes a top navigation bar with the Apricot logo, the text "MY APRICOT", and user information for Michelle Bendyk, Site Default Program HSP. A left-hand navigation menu lists options such as Dashboard, Search Records, My Apricot Tools (with My Reports highlighted), My Bulletins, My Shared Files, COVID Resources, Help Center, Submit an Idea, and Resource Center. The main content area is titled "My Reports" and features a "Select a Report Below" section. Under the "HSP" category, there is a list of reports, each with an "Actions" link:

- Client Summary Report ▶ Actions ▶
- Housed vs Unhoused by Caseworker ▶ Actions ▶
- DRAFT - Expected Housing Placements ▶ Actions ▶
- DRAFT Financial Report ▶ Actions ▶
- Financial Report Quality Assurance ▶ Actions ▶
- HSP 14 Part A and B ▶ Actions ▶
- HSP 14 Part C, D, and Comments ▶ Actions ▶
- HSP Workflow Report - Pending, Active and Closed Cases ▶ Actions ▶

A "Report List Filters" sidebar on the right allows filtering by Date, with options for All (selected), Creation Time, Modification Time, and Last Run. An "EXPAND ALL" button is located at the top right of the report list area.

HSP 14 Sample



Browser: HSP 14 Pa | URL: https://apricot.socialsolutions.com/report/run/report_id/695

apricot | MY APRICOT | Site Default Program HSP | Michelle Bendyk, Sonoma County

Report last run September 30th 2020, 3:38 pm
[Click to refresh data](#)

Search [] | Displaying 11 of 11 Rows (Expand All Cells)

CalWIN Case Number	Request Status	Date Case Approved	Age 0-5 years	Age 6-12 years	Age 13-17 years	Age 18-24 years	Age 25 years and older	Total Family Members
	Approved	07/31/2020	1	0	0	0	1	2
	Approved	07/16/2020	0	2	0	0	1	3
	Approved	07/15/2020	1	2	0	0	0	3
	Approved	07/27/2020	0	1	0	0	1	2
	Approved	07/23/2020	0	1	0	0	1	2
	Approved	07/15/2020	0	4	2	0	2	8
	Approved	07/24/2020	0	0	0	1	0	1
	Approved	07/16/2020	0	1	0	0	1	2
	Approved	07/30/2020	0	1	1	0	2	4
	Approved	07/23/2020	0	0	0	1	1	2
	Approved	07/30/2020	1	0	1	0	2	4
			Total Age 0-5 years	Total Age 6-12 years	Total Age 13-17 years	Total Age 18-24 years	Total Age 25 years and older	Total Total Family Members
			3	12	4	2	12	33

Report Actions:

- Refresh All Sections
- Print Mode
- Export
- Full Screen
- Reset Filters
- Return to List

Navigation: Dashboard, Search Records, My Apricot Tools, COVID Resources, Help Center, Submit an Idea, Resource Center

Landlord/Vendor Screen



Browser: https://apricot.socialsolutions.com/document/search/form_id/241

apricot MY APRICOT Site Default Program HSP CHANGE Michelle Bendyk Sonoma County

HSP Landlord/Vendor/Service Provider Profile

HSP Landlord/Vendor/Service Provider Profile Search

-- Add Search Field -- [Browse All](#)

The following 9 HSP Landlord/Vendor/Service Provider Profile records matched your search criteria (0.03 Seconds) [Fewer Columns...](#)

Business or Agency Name	Type	Primary Contact	Main Address	Primary Phone	Alternate Phone	Email
Extended Stay America South	Hotel	General Manager				
Hillside Inn	Hotel	Front Desk				
Kelley Rentals Property Management, INC.	Landlord					
	Landlord					
	Landlord					
	Landlord					
	Landlord					
The Living Room Center	Service Provider					

EXPAND ALL

Search Actions

- [New HSP...](#)
- [Clear Search History](#)

Favorite Lists

-- Select Favorite List --

Favorite Details

APRICOT BENEFITS

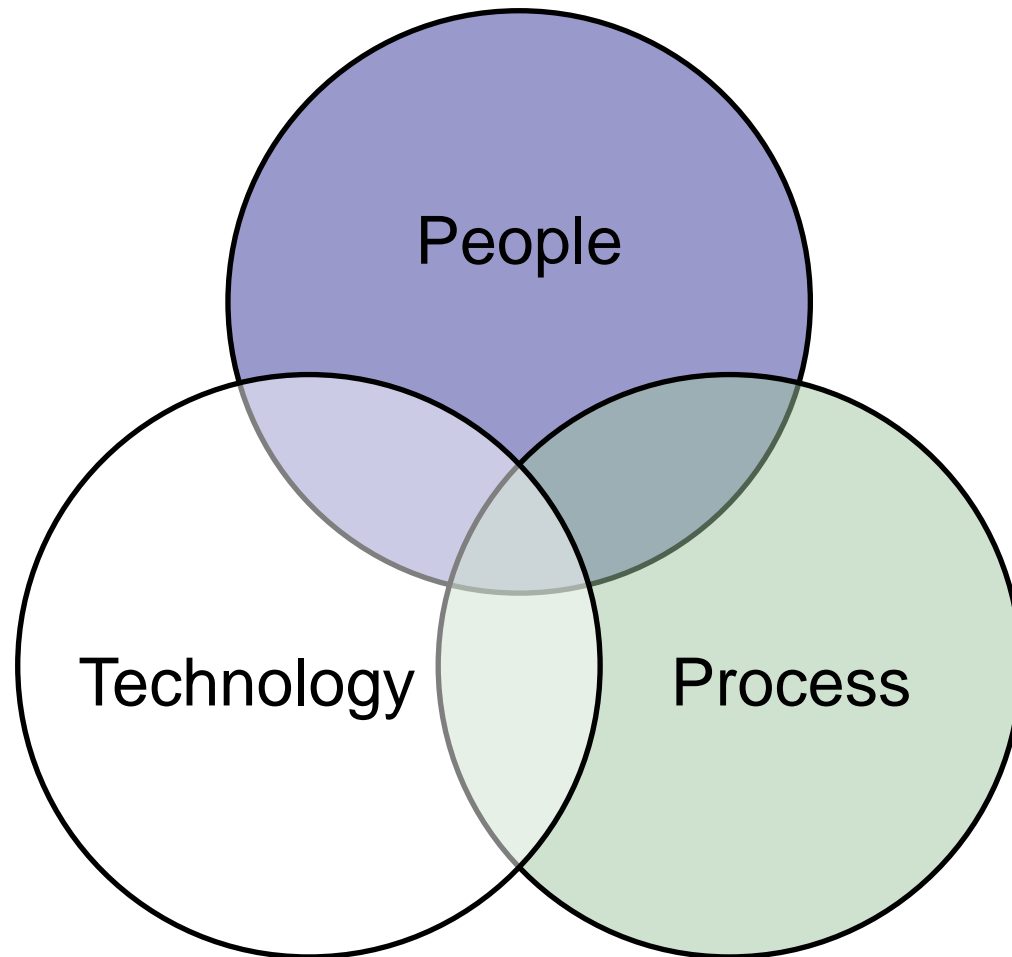




Technology Summary

Where we've found success with technology, specifically Apricot 360, takeaways from our journey to date, and our next steps.

Social Solutions  apricot[®] 360 





Scenarios where we found fit

1. Existing programs that do not have a system
2. New programs that need to be spun up quickly with proper data controls
3. Multi-stakeholder programs that need to collaborate on a process
4. Programs that are burdened by reporting and need organized ways to present data



Scenarios where we found fit

5. Agencies that want a broader view of unduplicated participants across many domains
6. Handling inter-agency and intra-agency referrals and closing loop on the outcome
7. Service coordination that involves many partners toward shared goals
8. Customize to a program need when required software platforms fall short



Our deployment methodology

- Develop a specification of the requirements
- Pilot an initial configuration
- Test and iterate with user feedback
- Improve and refine with ongoing system maintenance

**Reduce risk upfront with a proof of concept,
and then scale.**



Solution req's that align with method

- Configurable
- Built-in report designers
- Scales up with new users
- Earns high marks from users for ease of use

Overcome seemingly insurmountable technological hurdles with the right ingredients.



Our Apricot 360 highlights (features)

- Web-based
- Mobile accessible
- Compliant
- Role-based security
- SAP BI tools
- Integration-ready
- Custom configure
- Low user learning curve



Our Apricot 360 highlights (capabilities)

- Eligibility screening
- Track services
- Coordinate interventions
- Send/receive referrals
- Manage partners
- Survey populations
- Engage virtually
- Inform progress
- Measure pre/post
- Report outcomes
- Supervise staff



Our next steps

- Stronger integration with other systems, including SIS and CWS/CMS
- Track RBA measures for internal and external stakeholders, contracts, and programs
- Deploy broader use of resource/referral systems for County Social Workers
- Study cross-program participants and families that experience programs in more than one domain

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Additional Resources:

<http://upstreaminvestments.org/Learn/Reports-and-Publications/>

<https://srcity.org/2198/The-Partnership>

<https://www.sidekicksolutionsllc.com/apricot/blog/how-to-improve-apricot-software>