

Appendix E: Sample Site Visit Instrument

DATA SYSTEM COALITION SITE VISITS

SOFTWARE _____

VENDOR _____

SITE/AGENCY _____

CITY _____

PERSONS INTERVIEWED _____

COALITION REVIEWER _____

DATE _____

Guidelines for Site Visits:

- Attempt to talk with users of the software who represent a range of “user roles,” (for example, case managers, central server staff, agency heads, and consumers, if feasible).
- Attempt to observe the software in use at service program sites of different sizes and technical configurations.
- Review and measure the speed of the system. (How quick or slow is the system?)
- Arrange to watch a client intake.
- Enter some data yourself.

Questions: (Some questions can best be answered by a case manager while others can best be answered by central server staff. The goal is to have all the questions answered.)

System Configuration:

1. What kind of agency/system is your implementation designed for?
2. What geographic coverage are you attempting?
3. How are you using the software?
4. How long have you used it?
5. How many sites?
6. How many clients (homeless persons/families, program sites, agencies)?

Satisfaction with the software:

1. In what ways does the software meet your needs? In what ways does it fall short?
2. What do like about the product? What do you dislike?
3. What features do you hope to see in the next version of the software?

Function:

1. What is the ease of use for end users with this software? (10=very easy to 1=very hard)
2. How do the end users feel about the product?
3. Does the software allow a single agency to contain more than one site? Can each site have its own multiple programs? For example: a single agency may include shelters in different neighborhoods or counties. One of those shelters might operate a drug rehab program and a job-training program in addition to providing shelter beds. How would the software track which program(s) a client participated in?
4. For residential programs, how does the software handle overflow and seasonal variations in the number of beds available while still calculating occupancy rates and capacity?

Technical support from the software developer/vendor:

1. What has the support been like? (Rate your satisfaction: 10=very satisfied to 1=very dissatisfied)
2. How fast is the response time when you need help?
3. How courteous is the support staff?
4. Who from your system is allowed to call the software developer for TA or troubleshooting?

Customizability:

1. Describe the features of the software that allow for customization.

2. Who does the customizing? A local technical person? A local, less technical staff person? The software developer?

3. If the developer customized your system:

What was the customization and what were the costs?

How quickly was the customization completed?

How satisfied were you with the outcome?

Local Technical Support and Financial Requirements:

1. What local technical support (human expertise/hardware/etc.) is required at the central site?
2. What technical support (human expertise/hardware/etc.) is required at service program sites?
3. What are the financial costs for operating your system (Central Server costs, service program costs, other costs)?

Benefits:

1. How have clients benefited from using this system?
2. How have service programs benefited?
3. How has the community benefited in its understanding of clients and services?
4. How do you think clients perceive the whole system?

Reports:

- | | | | |
|----|---|-----|----|
| 1. | Does this produce the HUD Annual Progress Report? | YES | NO |
| | If yes, what is the process like? | | |
| | How long does it take? | | |
| | How accurate is the information? | | |
| 2. | Have you done reporting or data analysis across an entire community? | YES | NO |
| | If yes, how did it go? | | |
| | Can we have a copy of any published results? If so, whom should we contact? | | |
| 3. | How satisfied are you with the functionality of the software for aggregate-level data analysis at the Central Server level, including transport of data from program sites to Central Server? How does it work? | | |
| 4. | Does the software produce a meaningful Length of Stay Report? | YES | NO |
| | If yes, how does it define and measure a client's length of stay? | | |
| | How is an "exit" defined for a service program? | | |
| | How is "visit" defined for overnight shelters and housing programs? | | |
| 5. | Are you able to calculate an average turnover rate? | YES | NO |
| 6. | What system reports do you find useful? | | |
| 7. | How easily can you customize your own reports? | | |

Reliability of software:

- | | | | |
|----|------------------------------------|-----|----|
| 1. | Do you find the software reliable? | YES | NO |
| 2. | Does it crash? | YES | NO |
| 3. | Are the data it produces reliable? | YES | NO |

Implementation process:

1. How smooth has your implementation process been?
2. In what ways has the software contributed to or deterred your implementation?
3. Have you adapted your system to fit the software application or has the software been adapted to fit your system?
4. Where are data being hosted?
5. What entity is in the Central Server role?

Interface with other management information systems:

1. To what extent, if any, are any sites using the software in conjunction with or interfacing with another local product (homegrown or otherwise)?

If yes, what needed to be done to create this interface? How well does the interface work?