Community Information Exchange (CIE) Partner Meeting

May 7, 2020

WELCOME
&
INTRODUCTIONS

Talking, By Khalil Gibran

And then a scholar said, "Speak of Talking. " And he answered, saying:

You talk when you cease to be at peace with your thoughts; And when you can no longer dwell in the solitude of your heart you live in your lips, and sound is a diversion and a pastime.

And in much of your talking, thinking is half murdered. For thought is a bird of space, that in a cage of words many indeed unfold its wings but cannot fly.

There are those among you who seek the talkative through fear of being alone. The silence of aloneness reveals to their eyes their naked selves and they would escape.

And there are those who talk, and without knowledge or forethought reveal a truth which they themselves do not understand.

And there are those who have the truth within them, but they tell it not in words.

In the bosom of such as these the spirit dwells in rhythmic silence.

When you meet your friend on the roadside or in the market place, let the spirit in you move your lips and direct your tongue.

Let the voice within your voice speak to the ear of his ear;

For his soul will keep the truth of your heart as the taste of the wine is remembered

When the color is forgotten and the vessel is no more.

Agenda

1. Welcome & Introductions

2. 211 Update

3. CIE COVID-19 Survey Updates

   • Post Application Assistance

4. Food Analysis

5. Legal Aid Society- Eviction Moratorium

6. Resources & Tools

   • Tools for Working Virtually

7. Open Forum

Next Meeting: May 28, 2020 at 9:00 am

211
Update

211 Insights

- Received over 182,000 calls, since activation

- Top Needs:
  - Housing
  - Income Support
  - Utilities
  - Food

- Seen an increase in utility assistance needs

- 1 in 6 people are requesting food assistance

- All time high Public Health Nurse line (new testing available)

- Continued questions about CARES Act
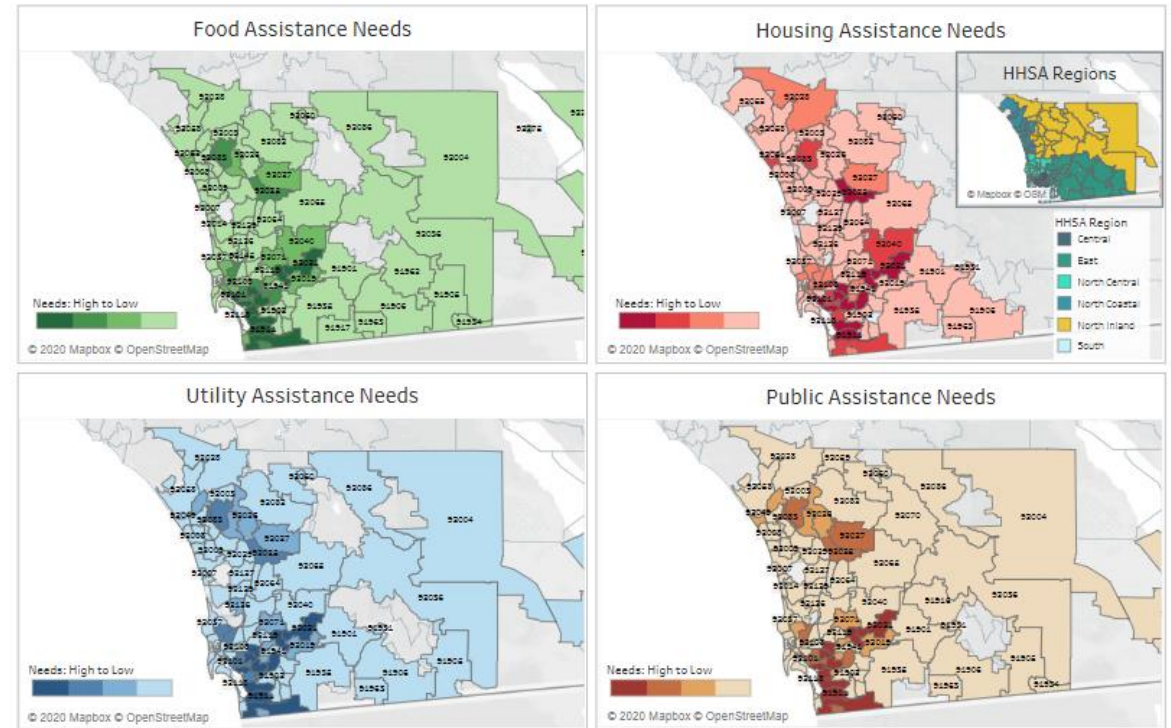
New testing

- COVID-19 testing is now available by State of California by appointment only

- Reservations do not require a doctor's note

- Anyone is eligible to receive COVID-19 testing

- Make an appointment online at https://lhi.care/covidtesting

- For those without Internet access, please call 888-634-1123, Monday through Friday, 7 A.M. to 7 P.M. (PST). The line is available in English and Spanish.

- Opt-in for results via text message or e-mail

CIE COVID-19 Survey Update

https://www.surveymonkey.com/r/W3PTWX6

# Post Application Assistance

Post Application Assistance Update

Increase in Applications:
- First time applicants for these resources
- Language barriers
- Access to a computer
- Technology savvy to navigate the online tools

- In North County, there was a 211% increase in applications in San Marcos and a 190% increase in Escondido
- In San Diego, areas with above average increases include Logan Heights (+ 120%), North Park (+139%), and Mira Mesa (+227%)

Comparison of Applications Submitted by Zip Code

© 2020 Mapbox © OpenStreetMap
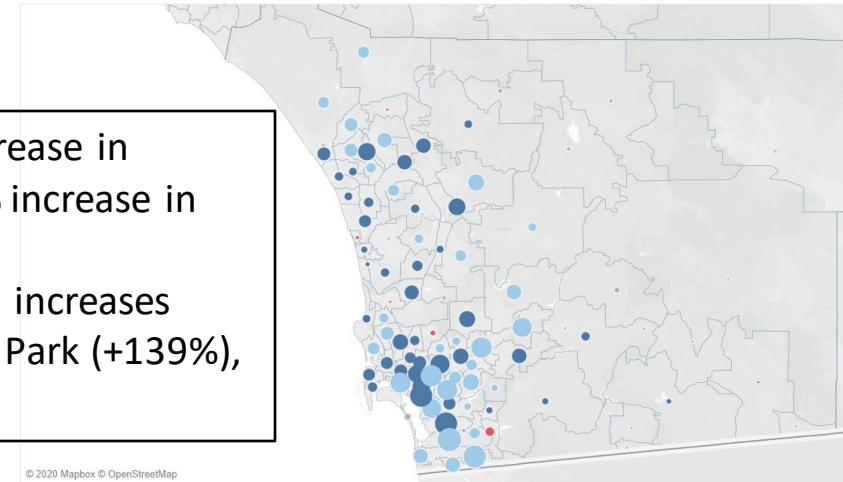
- **Opportunities to collaborate:**
  - Appointment setting via 2-1-1
  - Direct referrals via CIE
  - Uploading of documents
  - Program Enrollment
 - Shared training and tools

Food Analysis

Client Demographics

- The demographics for clients in need of food resources during COVID-19 are similar to demographics during the same timeframe in the previous year, with a few key differences:
  - Clients during COVID-19 are **older** (57% are 50 and older during COVID-19, compared to 43% in the previous year)
  - Slightly higher proportion of **women** clients (70% women during COVID-19, compared to 65% in the previous year)
  - Higher proportion of **Hispanic/Latino** clients and lower proportion of White clients during COVID-19, as compared to previous year (Hispanic/Latino: 41% compared to 33%, and White: 29% compared to 36%)
  - **Less likely for clients to be homeless** and seeking food assistance during COVID-19 (29% compared to 41%)
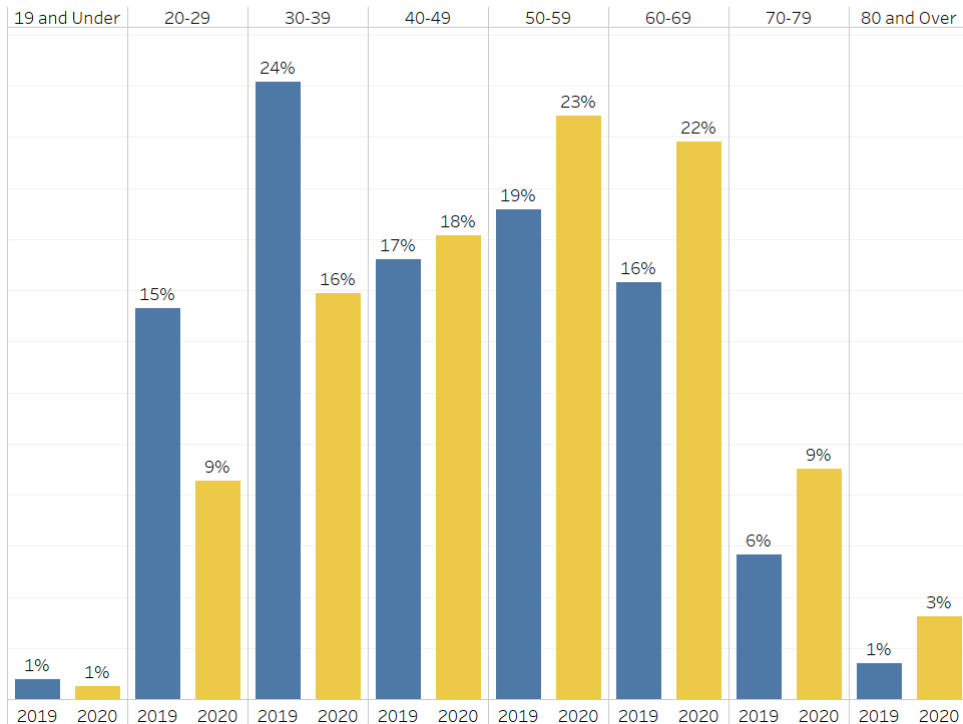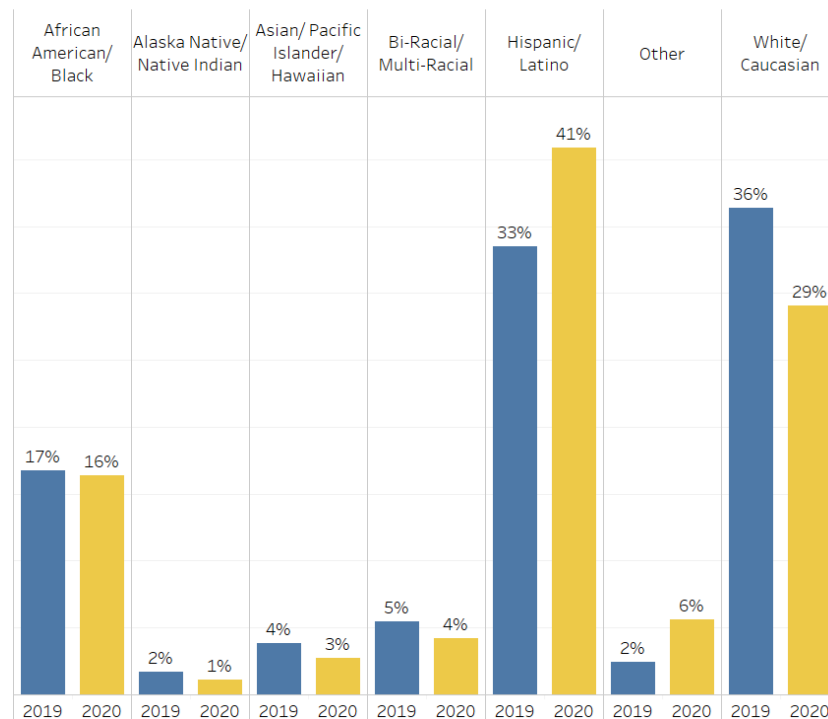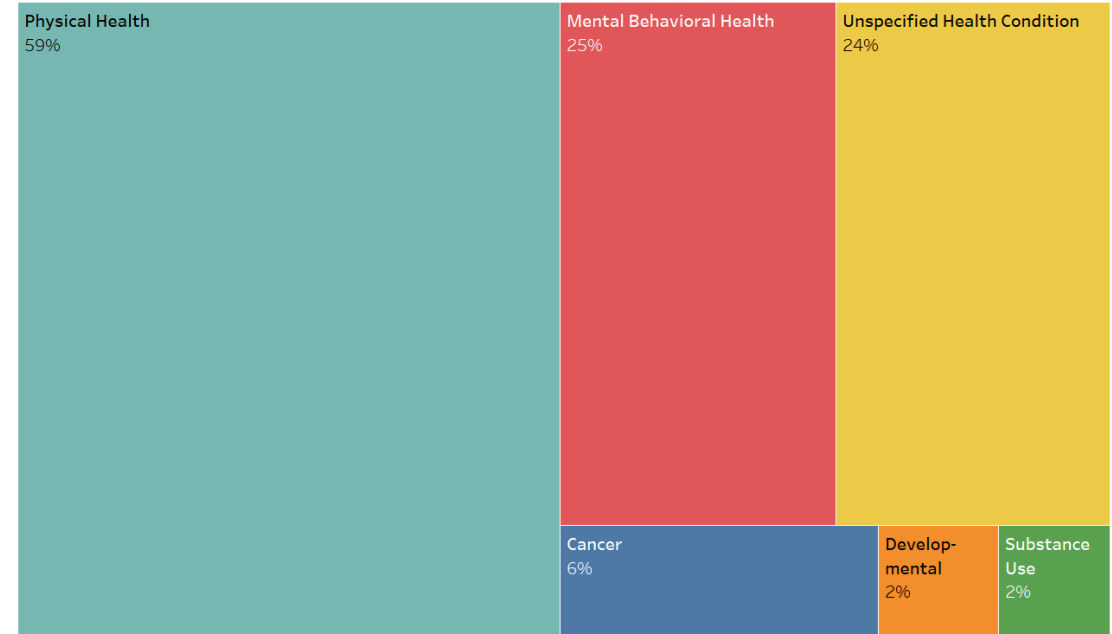
Client Demographics

Additional demographics of clients in need of food assistance during COVID-19, which are similar to demographics prior to COVID-19, include:

- 37% have children in the household
- 90% have household incomes at 30% of less of Area Median Income (AMI)
- 44% have a high school diploma or equivalent, 27% with some college, and 24% have less than a high school degree
- 38% are unemployed, 20% have at least part-time employment
- 9% are military/veterans
- 86% have health insurance, with Medi-Cal as most common type of insurance (50%)
- 61% indicated a health concern or disability

Health Conditions

| Physical Health 59% | Mental Behavioral Health 25% | Unspecified Health Condition 24% |
| Cancer 6% | Developmental 2% | Substance Use 2% |

- Among those with a health concern, physical health conditions are the most common type of health concern or disability (59%)
  - About 1 in 5 clients indicated they have **diabetes**
 - About 1 in 11 indicated they have **cardiovascular disease**

Comparing the Demand for Food Bank to Available Services

The following section analyzes potential imbalances between client need and available resources by calculating the ratio of need to the number of resources in a zip code (i.e. how many needs can be met by one food bank).

Interpreting the Map

- Areas shaded in red indicate that there are no food banks in that zip code
  - Darker shaded red areas indicate a greater demand but there are no food banks in that zip code
- Areas shaded in blue indicate that there is at least one food bank in that zip code
  - Darker shaded blue areas indicate a greater demand per food bank in that zip code


Needs to Services Ratio County Map

Ratio of Needs per Service

High to Low - 0 - Low to High

No Services - At Least 1 Service
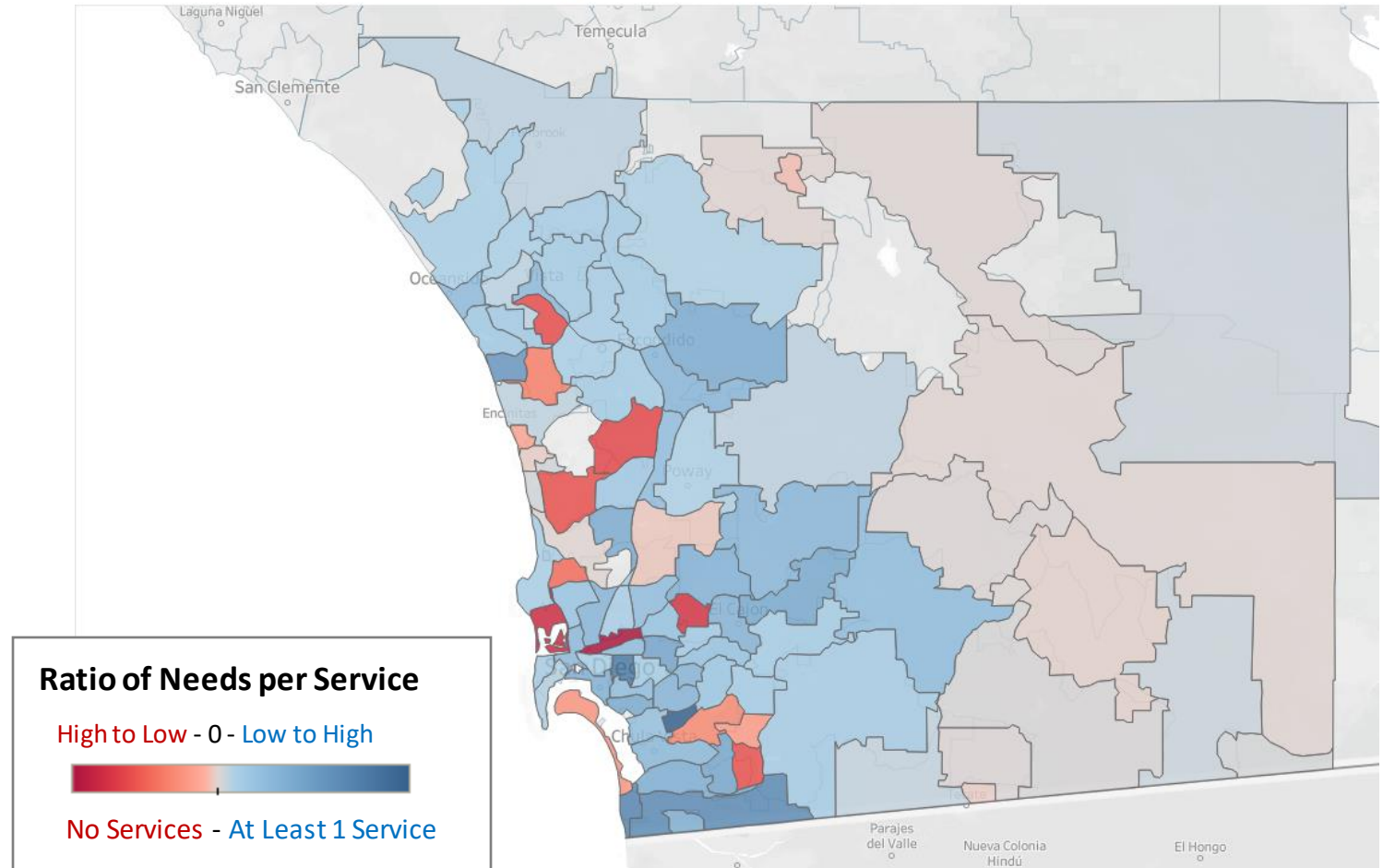
Limitations

- The share of resources represents the number of services offered in each service category group and does not necessarily represent the number of clients that can be served by a given service. For example, one service may serve 1,000 clients and another service could serve 100 clients. This analysis will treat both services the same.
- Maps are provided to visualize data on resources and needs. The maps provide a high-level overview of which neighborhoods have the highest level of need and where resources are located, but will not show service area.
- Additionally, data will be shown to illustrate which neighborhoods have high levels of need and low levels of resources. This data is limited to geographic boundaries such as zip codes and neighborhoods. Since clients can cross these boundaries for services, this data should also be used as a guide for where gaps in resources may exist.
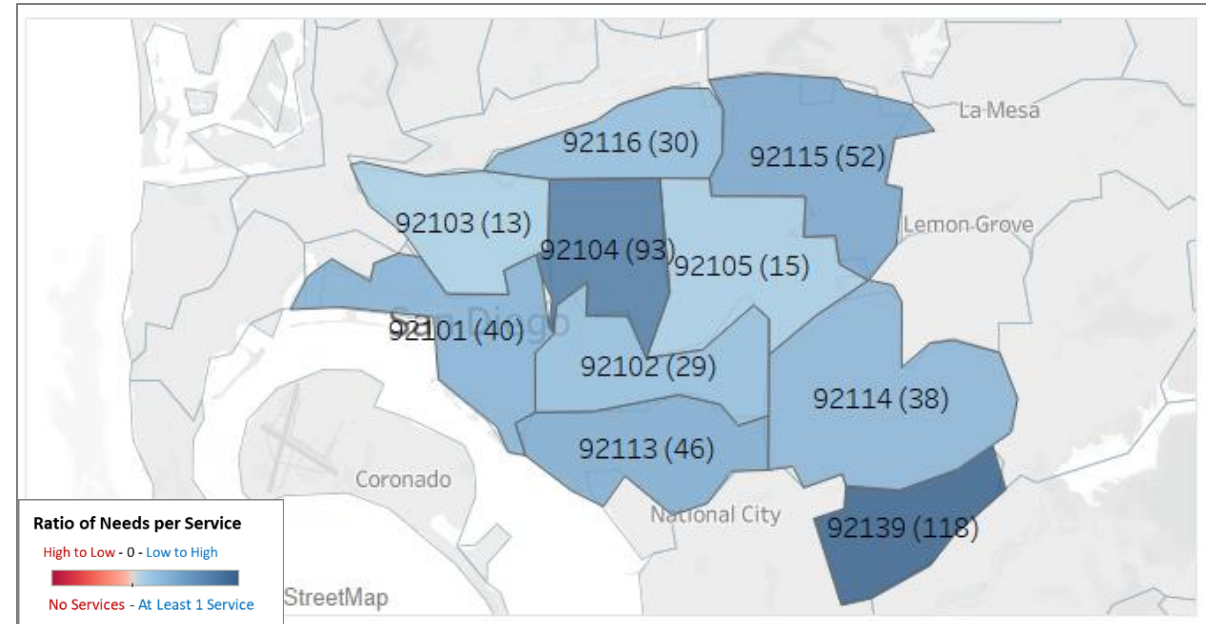
Central | 23% of need : 20% of resources

Location of Resources with Number of Referrals
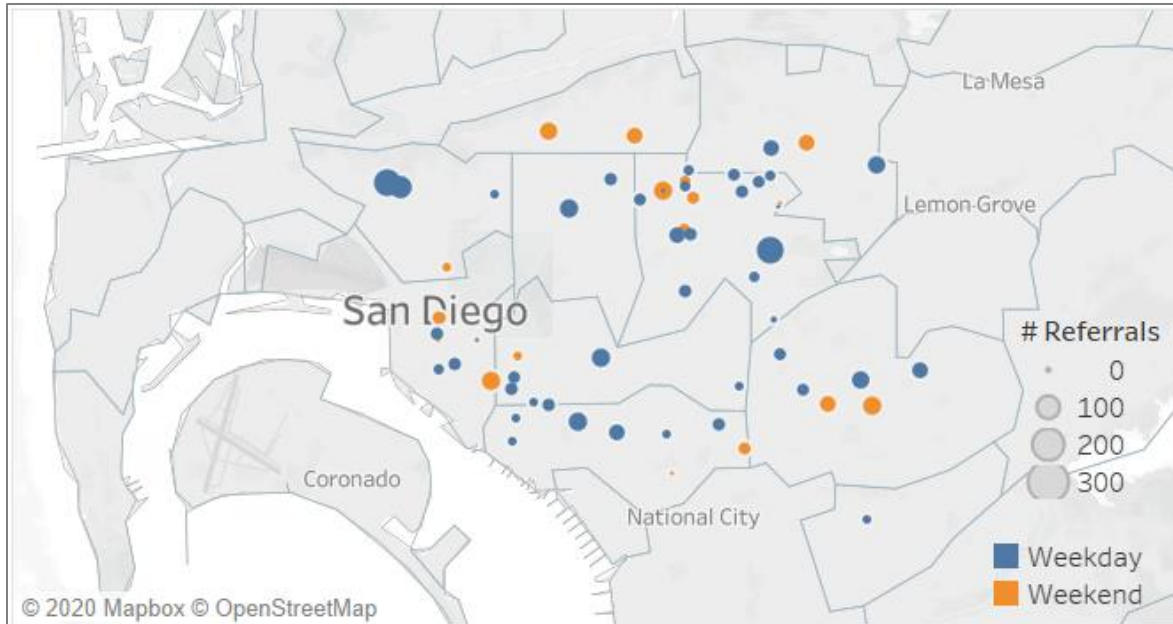
Ratio of Needs per Service by Zip Code

- Weekday referral options are more commonly provided than weekend options (27% of referrals provided to weekend resources)

- Greatest disparity in need to service ratio in North Park (92104) and Paradise Hills (92139)
- In North Park, there are 93 needs per resource and 118 needs per resource in Paradise Hills
- The demand in North Park for food pantries is nearly double the typical demand from 2018

South | 19% of needs : 13% of resources

Location of Resources with Number of Referrals

Ratio of Needs per Service by Zip Code

- Weekday referral options are more commonly provided than weekend options (23% of referrals provided to weekend resources)

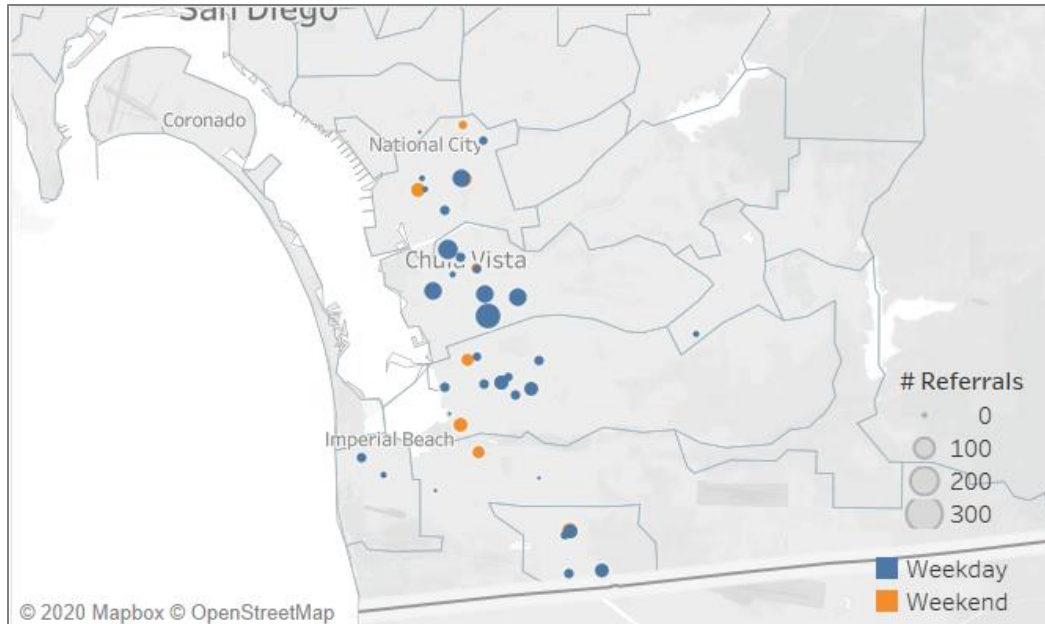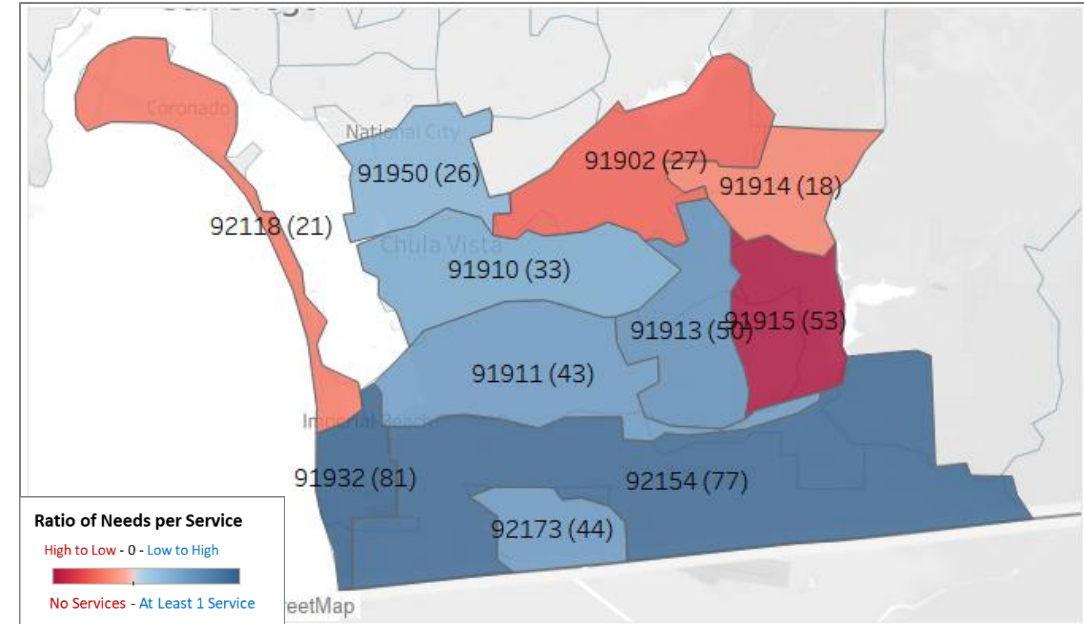- Imperial Beach (92132) and Otay Mesa (92154) have nearly double the amount of needs per resource than other communities
- Chula Vista (91915, 91914), Coronado (92118), and Bonita (92102) have no resources to meet the need

East | 17% of need : 22% of resources

Location of Resources with Number of Referrals

Ratio of Needs per Service by Zip Code

- Weekday referral options are more commonly provided than weekend options, with the highest share of weekend referrals in this HHSA region compared to other regions (34% of referrals provided to weekend resources)

- El Cajon (92021) has more than double the needs per resource compared to other zip codes in the East region, though resources are located in areas of highest demand

North Central | 10% of need : 12% of resources

Location of Resources with Number of Referrals

- Weekday referral options are more commonly provided than weekend options (20% of referrals provided to weekend resources)
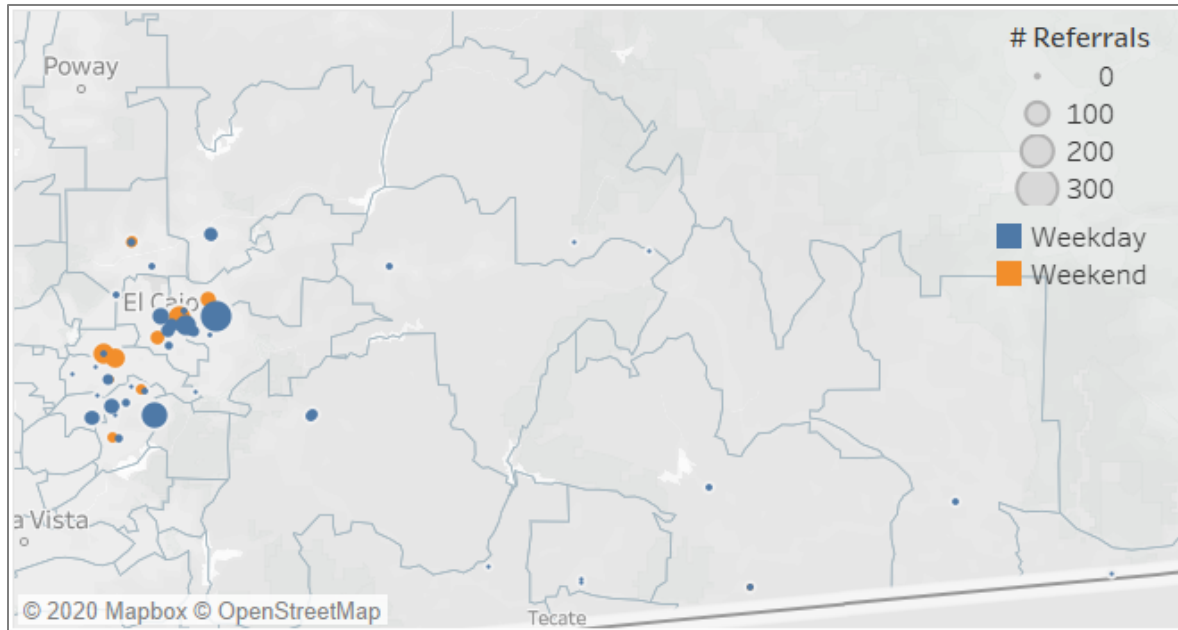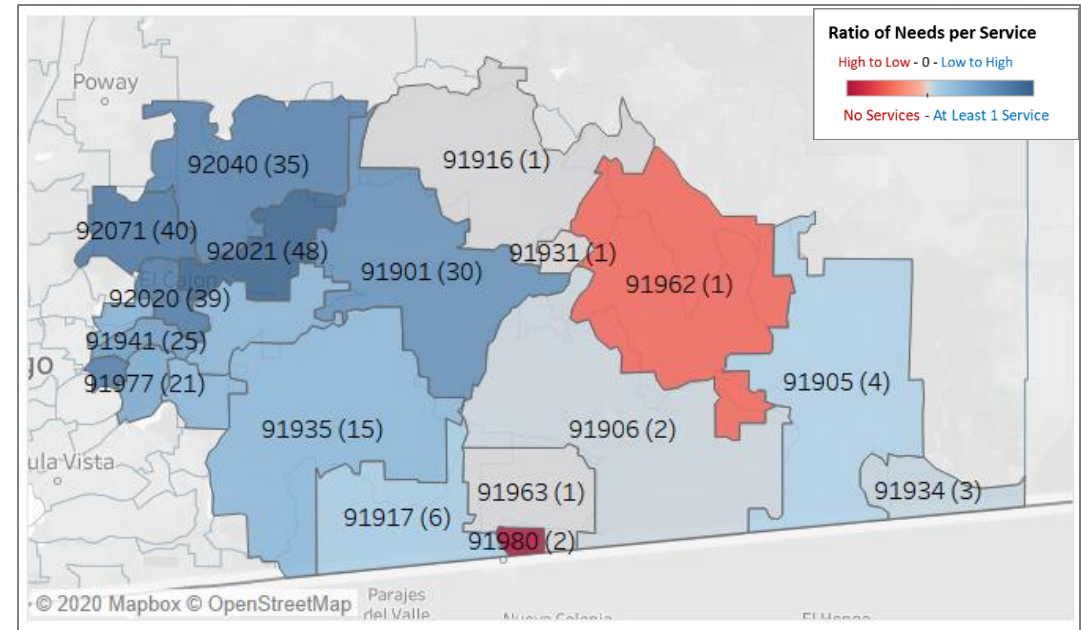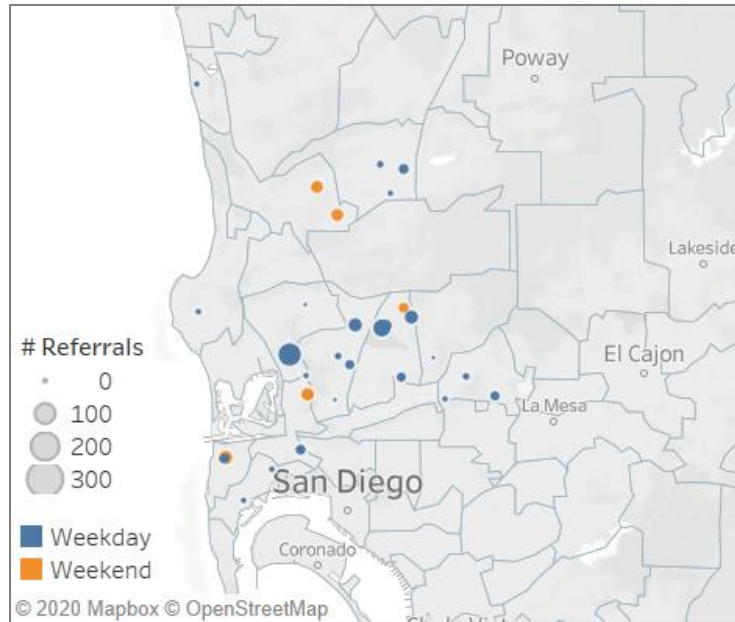
Ratio of Needs per Service by Zip Code

- Four areas have no resources to meet needs: Mission Valley (92108), Pacific Beach (92109), Carmel Valley (92130), and University City (92122)
- The demand for food pantries doubled in University City and Mission Valley and tripled for Carmel Valley compared to 2018

North Inland | 8% of needs : 18% of resources

Location of Resources with Number of Referrals

Ratio of Needs per Service by Zip Code

- Weekday referral options are more commonly provided than weekend options (25% of referrals provided to weekend resources)

- North Inland has the most resources per need
- Parts of Escondido (92025, 92027) have triple the needs per resource, and Rancho Bernardo (92127, 92128) has 7 times the needs per resource in this region
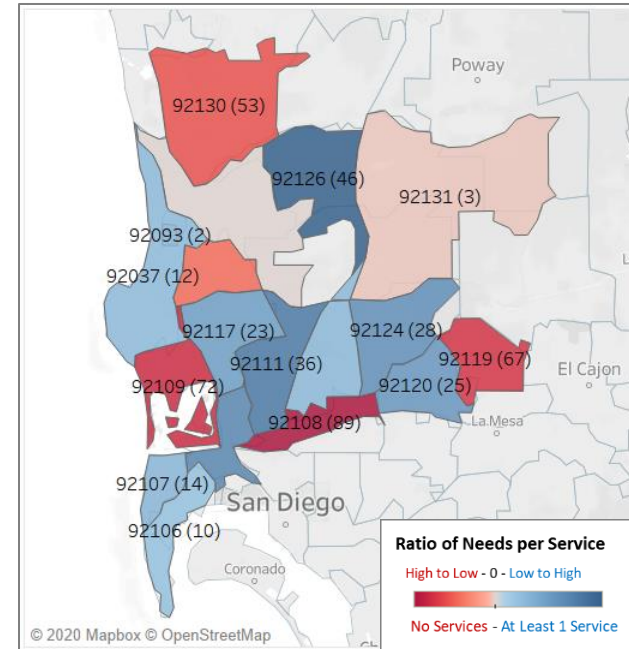- The demand for food pantries in Rancho Bernardo has doubled since 2018

North Coastal | 7% of needs : 12% of resources

Location of Resources with Number of Referrals
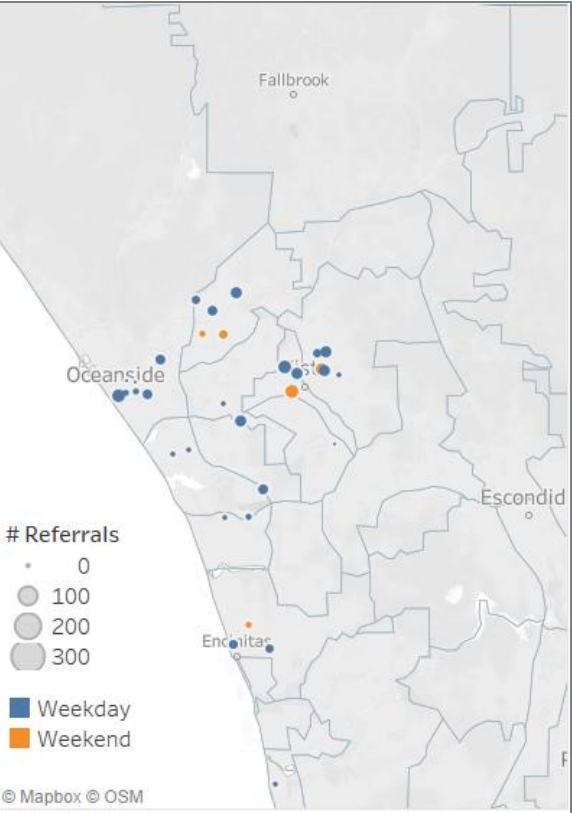
- Weekday referral options are more commonly provided than weekend options (27% of referrals provided to weekend resources)
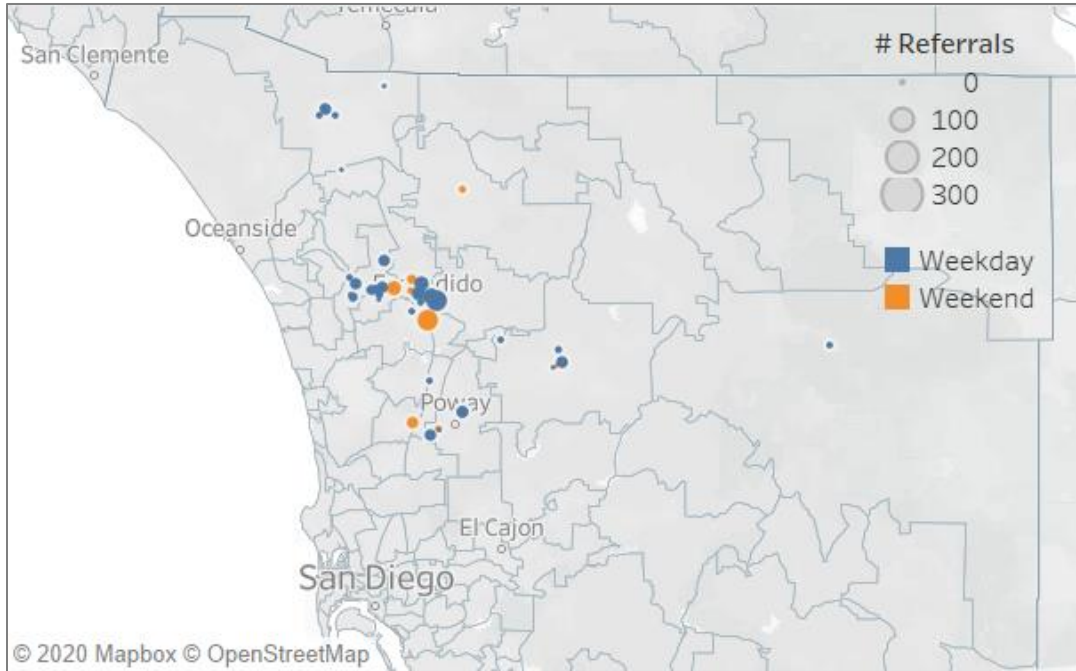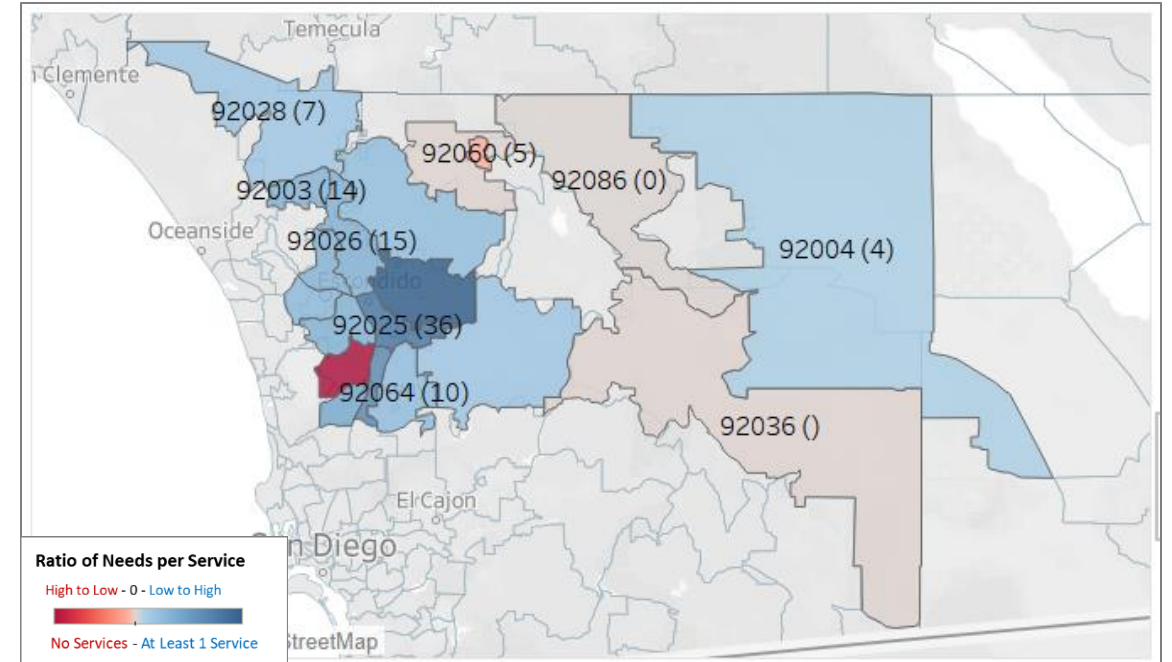
Ratio of Needs per Service by Zip Code
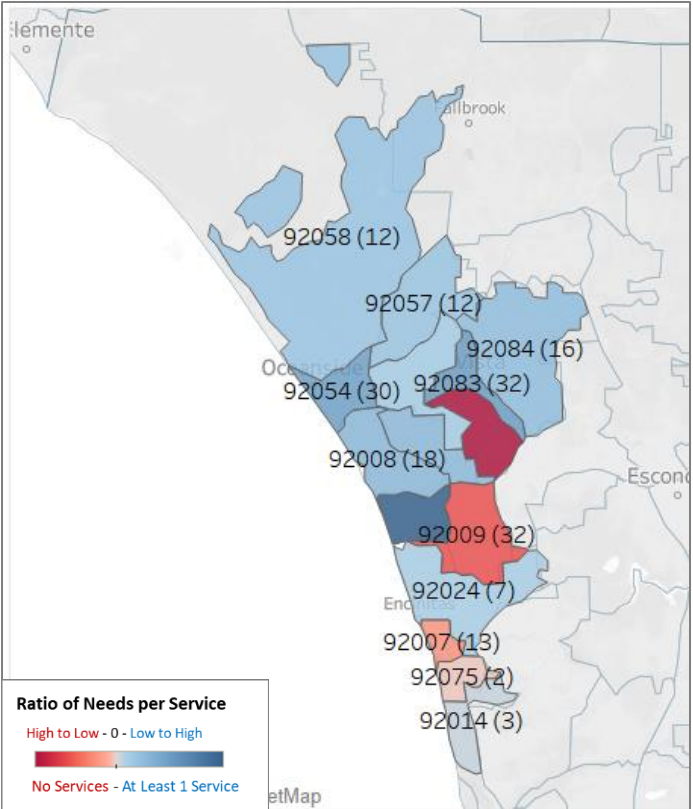
- Carlsbad (92011) has 4 times the number of needs per resource compared to all other areas in this region
- Oceanside (92054) and Vista (92084) have almost double the needs per resource
- The demand for food pantries in 92011 is 5 times the typical demand from 2018

Legal Aid Society Of San Diego

Gil Vera, Esq. (Pronouns: He/Him/His)
Senior Attorney, Housing Team
LEGAL AID SOCIETY OF SAN DIEGO, INC.

For more information, visit:
https://www.lassd.org/
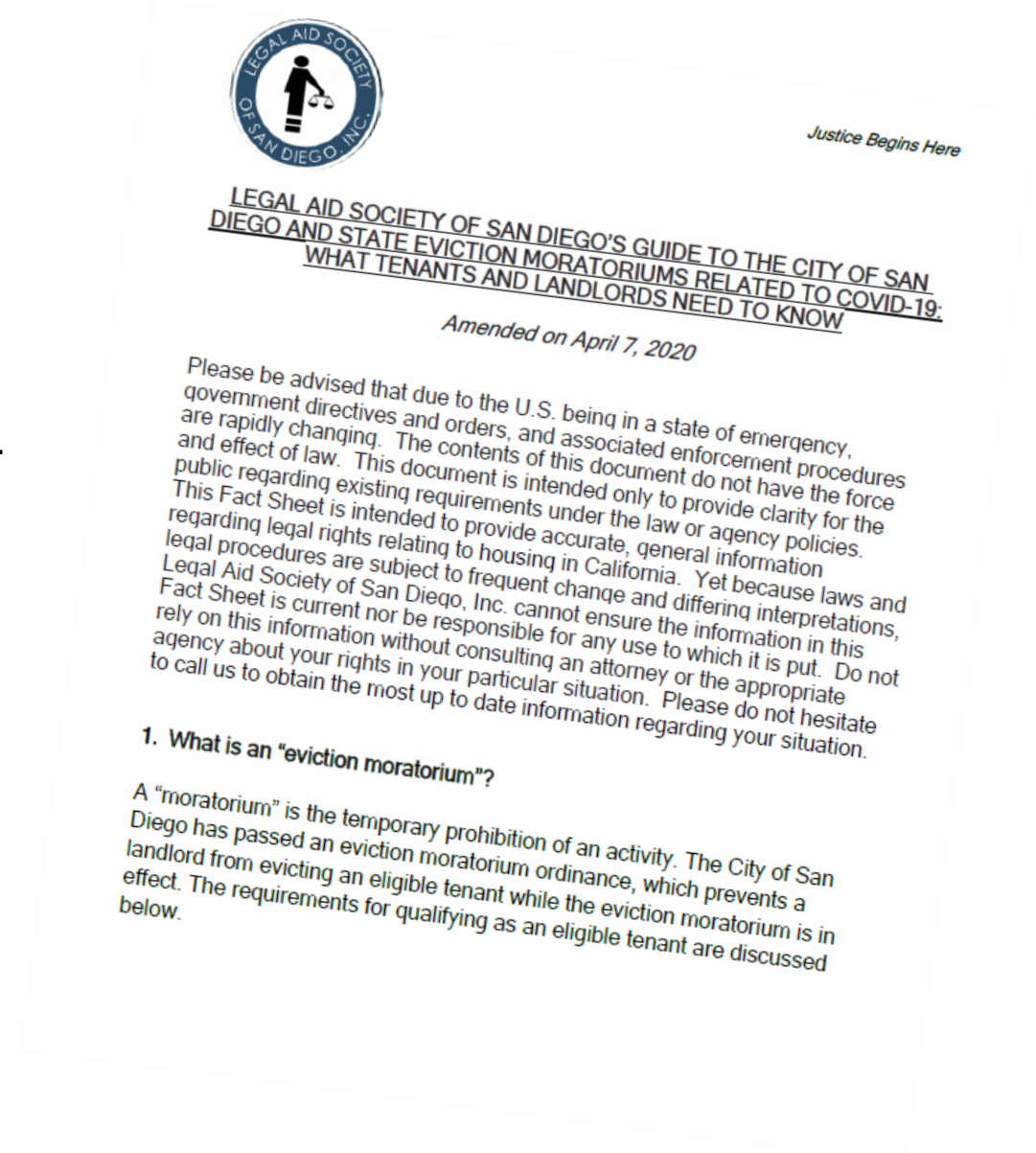
Resources
&
Tools

Online Career Portal	workforce.org/portal
Career development webinars	workforce.org/events
Career Center services	workforce.org/careercenters careercenters@workforce.org
Info for job seekers impacted by COVID-19	workforce.org/covid-19
Info for employers impacted by COVID-19	workforce.org/covid-19-bus

sdworkforce   #thisisworkforce   workforce.org

New resource:
Layoff Transition Webinar

- Mondays, Wednesdays, and Fridays from 10 a.m.—11 a.m.

- Help applying for Unemployment Insurance—with an EDD rep!
- Intro to free training resources
- Help navigating health insurance and retirement account options

- https://workforce.org/events/layoff-transition-webinar/

Building your IT infrastructure for Remote Services

Special thanks to **Connetic**

Disclaimer

- This is a starting point for learning, not an end point.

- We can point you in the right direction, but you've got to do your own due diligence before making purchases or storing data with someone.

- We're speaking as programmatic colleagues, not as funders. Everyone's situation is different. Contracts, prime recipients, funding streams and so on all vary. Speak to your funder before making any decisions.
  - If your funder is the Workforce Partnership or the City of San Diego, this does not count as speaking to your funder ☺ Talk to your Program/Project Specialist.

Cloud infrastructure

- Like owning vs renting a home
- Serverless – becoming a tenant of online services rather than owning your own hardware & software
- Pay for what you need one month at a time
- Relatively simple security & configuration. More care needed as you grow.

Cloud decision tree

Choose an Apps provider
- Office 365
- Google Apps
- Zoho Office

Add a phone or conferencing solution

Add workflow management

Configure for integration and security

At the Workforce Partnership…

Choose an Apps provider
- Office 365
- Google Apps
- Zoho Office

Office 365

Add a phone or conferencing solution

TPx
Zoom

Add workflow management

CalJobs
Salesforce
DocuSign
211 CIE

Configure for integration and security

Staff
Connetic

Your systems shopping list…

- ❑ Email & Calendars
- ❑ Document storage
- ❑ Phones
- ❑ Conferencing and webinars
- ❑ Workflow management
- ❑ Internet service
- ❑ Devices

Email

- Microsoft Office 365:
  - Best for users of Microsoft Outlook and Desktop apps
  - Comes with Microsoft Office Software included (Word, Excel)
  - OneDrive/SharePoint Teams file sharing is less mature

- Google Apps:
  - Gmail is best for mobile device, tablet, web, and Mac Users.
  - Comes with collaboration-oriented Docs, spreadsheet, etc. Google Drive is "best in breed" for online file sharing.

Online calendars

- Really only two functional choices: Microsoft or Google. Both are available only as part of their full office package

- Office 365
  - Integrates with Microsoft Outlook
  - Included with Outlook Web Access

- Google Calendar
  - Web-Based
  - Integrates easily with iPhone
  - Integrates easily with Google Meet for phone or video conferencing

Cloud Document Storage

Microsoft OneDrive or Google Drive

- Integrated with the apps you chose earlier
- Cost generally included in your apps selection earlier

Dropbox

- Common and easy to use, but watch out for security issues
- Pricing begins at $10/user/month

Box.net & Egnyte

- More security-oriented
- Pricing begins at $7/user/month

Phones

Vonage	RingCentral	8x8	Cell Phones
• Largest provider • Reliable • Call-center workflows • Pricing begins at $20/line/month	• All-in-one platform for (minimal) conferencing • Pricing begins at $20/line/month	• Up-and-coming service • Pricing begins at $12/line/month	• Your landline provider can likely forward calls to staff cell phones • Consider whether you would need to reimburse employees

Conferencing and webinars

- VOIP providers do not have compelling meeting/conferencing solutions compared to dedicated providers
- In our experience, this is particularly important for client interactions

	Microsoft Teams	Google Meet	Zoom	GoToMeeting
Overview	Based on Skype technology	Purely web-based (no installers)	Easy to install. Some security concerns if not careful.	Easy for hosts to use
Webinar features	Early stages	Limited	Well-developed, interactive	Well-developed, interactive
Pricing	Included in Office365	Included in Google Apps	$15/mo meetings $40/mo webinars	$14/mo meetings $89/mo webinars

Webinar best practices
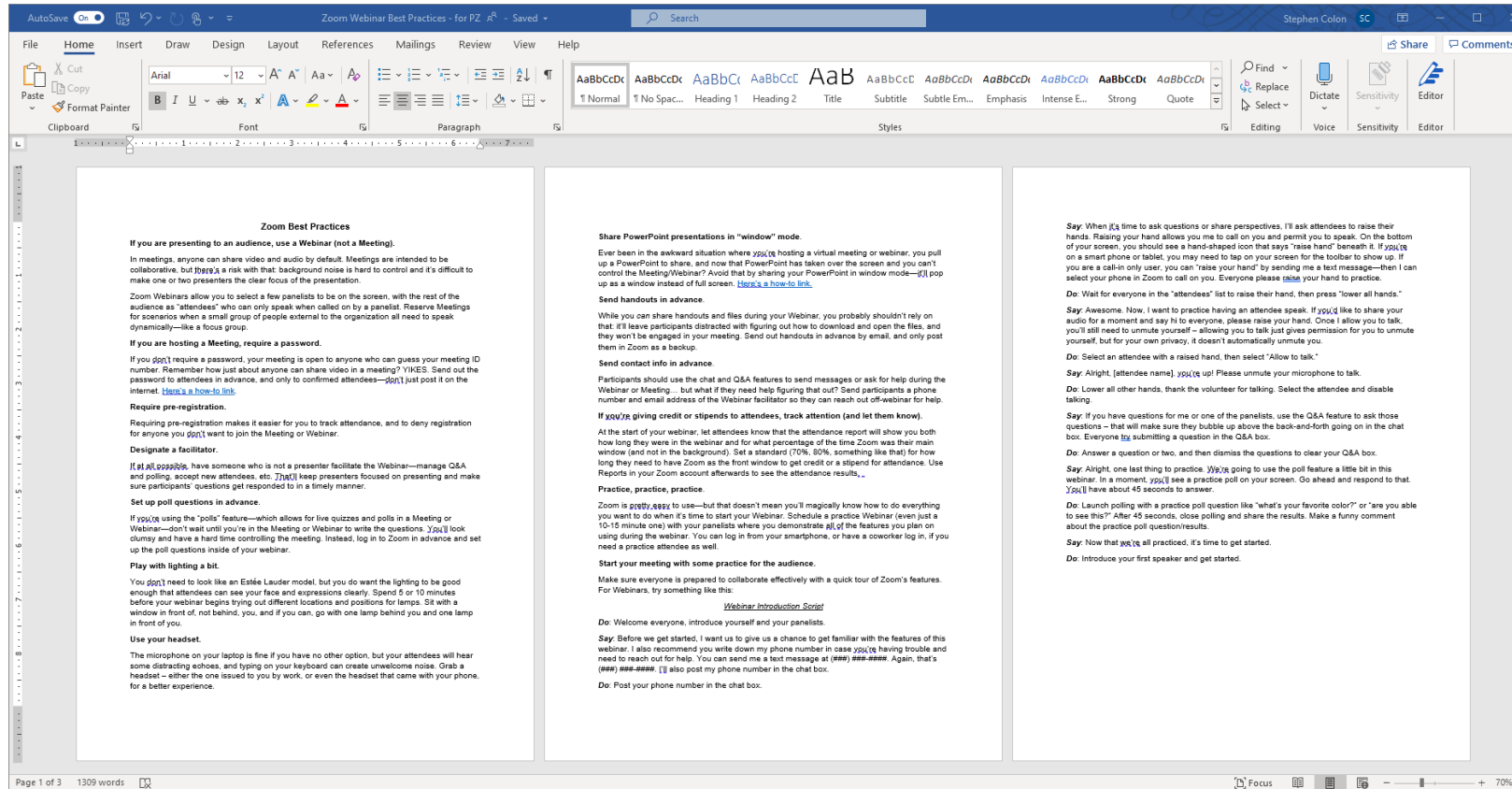
Link in chat box

Workflow management

Case Files	Paperless	Project/Service Management
• Apricot/ETO • CiviCore • Salesforce • Excel or Access • ZohoCRM	• Acrobat Cloud • DocuSign • ProcessMaker	• Basecamp • Jira • Trello • ZenDesk

Internet

Package	Monthly Data Plan	Speeds Download / Upload
Starter	1 TB (1,024 GB)	5 Mbps / 1 Mbps
Essential	1 TB (1,024 GB)	15 Mbps / 2 Mbps
Preferred	1 TB (1,024 GB)	50 Mbps / 5 Mbps

- For video calls, webinars, etc, look at the *upload speed* and *data caps*

- Ex: Each person connected to a Zoom call in your home uses…

Download	Upload	Data
2.5mbps	3mbps	2.4GB/hour

- Consider reimbursing internet plan upgrades for staff, especially those who present/train often

Devices

	Case Managers	Administrative Staff	Financial Analysts
Budget	$150 (desperate) $300 (reasonable)	$600	$1,200
Usage style	Web browser, Email, Microsoft Word	Lots of web browser tabs, PowerPoint	Many complicated Excel workbooks at once
Processor	Most anything	Core i5/equivalent	Core i7/equivalent
RAM	4 GB (desperate) 8 GB (reasonable)	8 GB	12 GB - 16 GB
Notes	Consider Chromebooks		

- If the cost difference is minimal, you'll be glad you got a nicer webcam & an Ethernet port
- Ask your staff what feel the handiest using
- Consider reviews of keyboard quality/comfort; consider screen size

Procurement tips
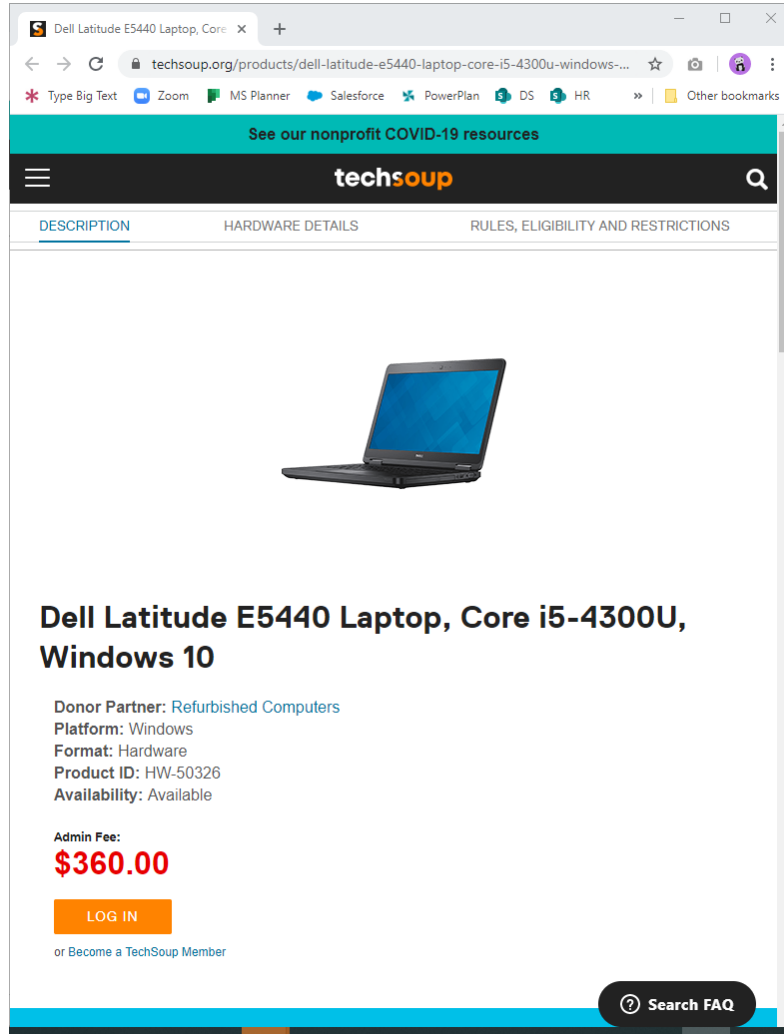
- TechSoup has refurbished laptops at fantastic prices
  - Expect shorter lifespan and less uniformity/more limited availability
  - Watch out: some are old corporate/high-security enviro. laptops without cameras
- If you're having a hard time finding laptops in stock, check...
  - B&H Photo Video
  - Best Buy Pick Up In Store
  - Newegg
  - Your funders!

Procurement tips

- Salespeople are your *friends.* Be clear about your decision-making process and what is important to you.

- Always, always, always ask for non-profit pricing

We are a price-sensitive organization

I'm looking for something that can do X, Y and Z.

I'm hoping to decide within three weeks.

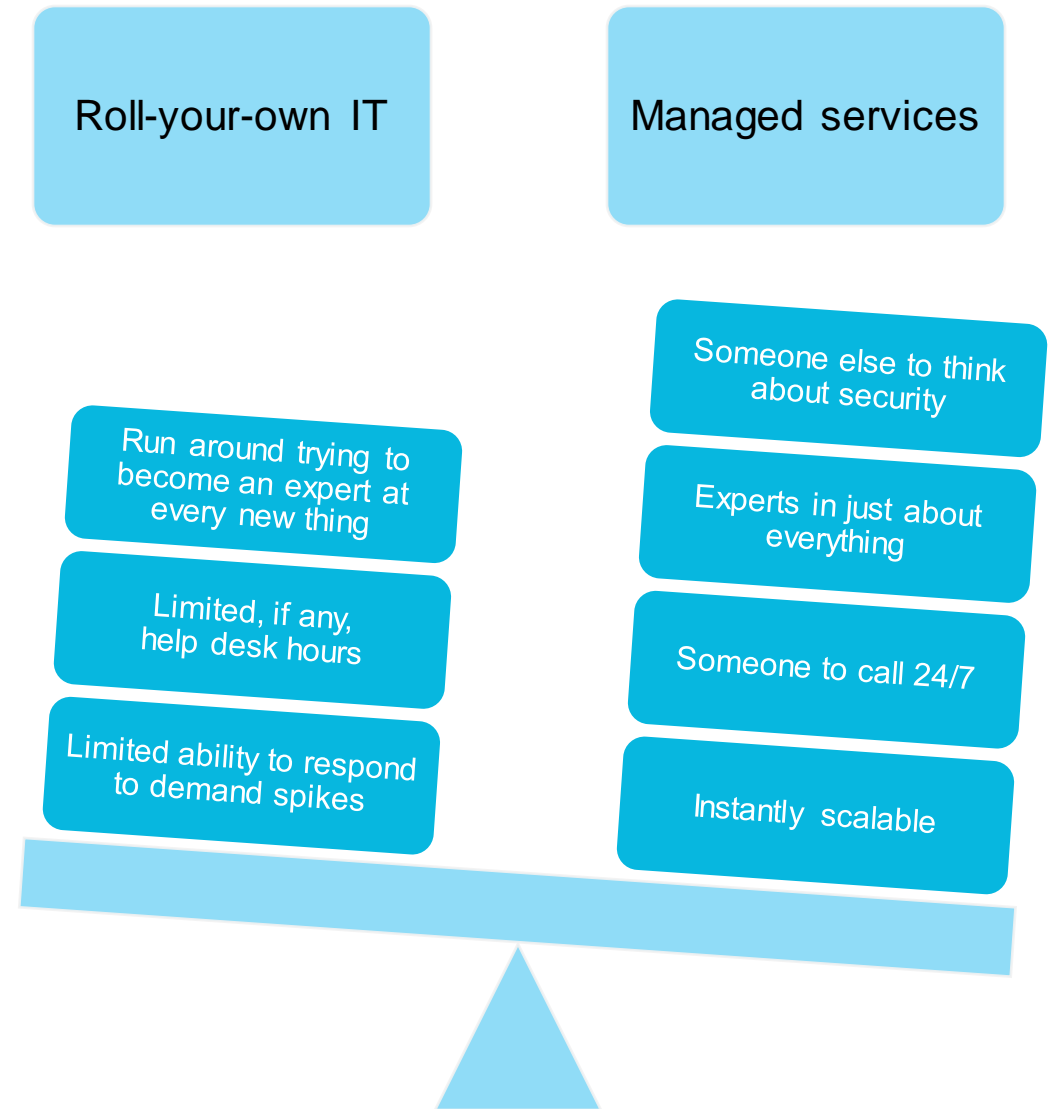I can get approval for anything under $3,500 easily. Above that, it's a longer process.

Right now, we're comparing products A, B and C. Your product is our favorite because of its user interface. Transparently, we can't afford $1,000,000. Do you have nonprofit pricing available?

From our view, the biggest weakness is that X doesn't come bundled. Can you help with that?

Why we use managed services

- The stakes were too high to do it alone
- We were not as prepared for crises as we wanted to be
- Roll-your-own IT got a lot more expensive as we grew

Roll-your-own IT

Managed services

Run around trying to become an expert at every new thing

Limited, if any, help desk hours

Limited ability to respond to demand spikes

Someone else to think about security

Experts in just about everything

Someone to call 24/7

Instantly scalable

Why we use managed services

- The stakes were too high to do it alone
- We were not as prepared for crises as we wanted to be
- Roll-your-own IT got a lot more expensive as we grew

Connetic

support@connetic.net
(866) 2-CONNET
(866) 226-6638

Roll-your-own IT

Managed services

Someone else to think about security

Run around trying to become an expert at every new thing

Experts in just about everything

Limited, if any, help desk hours

Someone to call 24/7

Limited ability to respond to demand spikes

Instantly scalable

Communicating your changing needs with funders

Disclaimer

- This is a starting point for learning, not an end point.

- We're speaking as programmatic colleagues, not as funders. Everyone's situation is different. Contracts, prime recipients, funding streams and so on all vary.

- Any examples about funding we received or exceptions we were granted should not create the exception you will receive the same.

Components of a request

Why   **How**   **What**

(Clear rationale)   **+**   (Clear request)   **+**   (Clear backup)   **=**   (**Progress**)
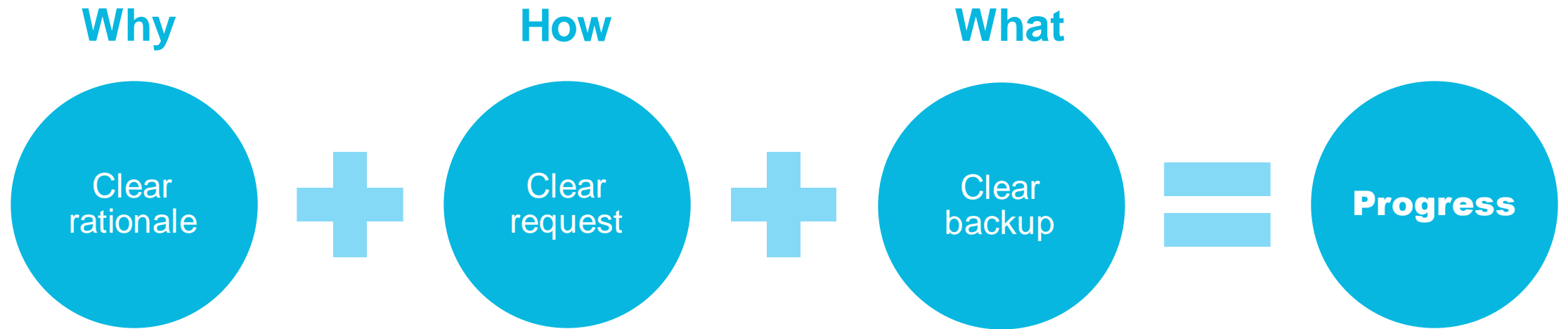
Choosing your language

Urgency

Humanity

STAY HOME

Mutuality

Urgency

- "…we need **your** help."
- "If we **act now**…"
- "We are **almost there**…"

Humanity

- Get population-specific
- Name their peers
- Talk to the individual; request support from the organization

Urgency & humanity in the why

- With so many jobs impacted, the tenants we serve need legal aid now more than ever.

- Working families everywhere are making difficult choices about which bills to pay. In the past three weeks, our credit counseling hotline has received [##] more calls than usual.

- It's impossible to know all the ways the public health emergency will impact our small businesses in the end – but we do know that one of the few ways to reduce that impact is by assisting them with paycheck protection loan applications."

Urgency & humanity in the how

Since [first year funded], [Funder]'s partnership with [Agency] has helped [number] San Diegans get on track to financial independence. Our work has been possible only because of your program investments. We are phenomenally grateful.

Now, we need your help with the *operational* investments it will take to begin remote program services. Our credit counselors need laptops and headsets to start taking calls remotely.

Urgency & humanity in the how

Since 2015, [Agency] has helped [number] San Diegans find living-wage work. We are incredibly proud of this work—and grateful for the philanthropic partners who have made this possible. We owe a special thank you to [peer funder], whose [$] investment in programs empowered us to provide [services, quantified].

Now, we need your help with the *operational* investments it will take to begin remote program services. Our credit counselors need laptops and headsets to start taking calls remotely.

Urgency & humanity in the what

- We need $[#] to fund internet access for these job seekers as soon as possible—or their paychecks may be at risk. For every $[#] [Funder] contributes, one more job seeker can sustain remote employment.

- If we can act quickly, we can procure laptops for our team of 10 agents at a total cost of $[#]. Of course, we're not the only people looking for work-from-home equipment right now. If we don't act quickly, we expect to face supply chain constraints—turns out laptops are the new toilet paper.

Mutuality

STAY HOME

- Partnerships are more appealing than gifts
- Create as many reasons to say "yes" and as many budgets to pull from as possible.

Sample Email

Hi Amanda,

I hope you and your family are safe & healthy with everything going on. I'm reaching out because a partnership opportunity came up during our morning leadership meeting and I wanted to share with you.

It's impossible to know all the ways the public health emergency will impact our small businesses – but we do know that one of the few ways to reduce that impact is by assisting them with paycheck protection loan applications.

Since 2015, the Acme Corporate Foundation's programmatic investments with SmallBizLand have helped 1,000 entrepreneurs compete in the market. We are phenomenally grateful for your support. Now, we need Acme's help with the *operational* investments it will take to begin remote program services. Our small business consultants need laptops and headsets to start taking calls remotely.

We think there's a neat opportunity here for Acme to show the community its commitment to small businesses by helping fund that. We have a vendor who can provide the equipment we need for $9,500, but need to act quickly while they're still in stock… turns out laptops are the new toilet paper. We were thinking we could also do a joint press release promoting the resource and highlighting the part Acme played in making the resource available.

If that's something you think Acme would be interested, I'd be happy to hop on a call or a Zoom later this week. I'm available Thursday before 3 pm or Friday after 10 am.

Thanks so much,

Stephen

Unique Concerns for Budget Modifications & Policy Exceptions

Budget modifications and policy exemptions

- What's *actually* holding you back?

- Is your total budget insufficient?
  - Is your spending *reducing* anywhere? Transit stipends? Fees for trainers?

- Is your budget too restrictive?

- Is there a policy you would violate by purchasing a category of asset, or by making that purchase at a specific point in time?

Clear rationale: inciting incident

- "On March 17, 2020, the San Diego City Council ratified a public health emergency related to COVID-19…"

- "On March 19, 2020, the Governor of the State of California issued executive order N-33-20 requiring…"

- "On April 10, 2020, the County of San Diego issued a modified Health Officer Order requiring the closure of…"

Clear rationale: impacted activities

- "As a result, [agency] is shifting its training programs to an online format."

- "[Agency] staff are now required to work remotely."

- "Compliance with this order has required the cessation of in-person services for clients in [Agency's] [program]."

Clear request

- "We propose a budget modification subtracting $1,500 (the cost of remaining training space rentals) from the special events budget category and adding the same amount to the supportive services budget category. This will allow [Agency] to purchase laptops for clients who need to attend trainings via webinar."

- "We are requesting a temporary exemption to the accelerated spend requirements found in section 9.9.9 of the FY20 Operating Manual, so that [Agency] may purchase laptops for staff working remotely."

Clear rationale and request

On March 19, 2020, the Governor of the State of California issued executive order N-33-20 requiring Californians to remain at home whenever possible. As a result, [Agency]'s training programs will now be offered via webinar.

We propose a budget modification subtracting $1,500 (the cost of remaining training space rentals) from the special events budget category and adding the same amount to the supportive services budget category. This will allow [Agency] to purchase laptops for clients who need to attend trainings via webinar.
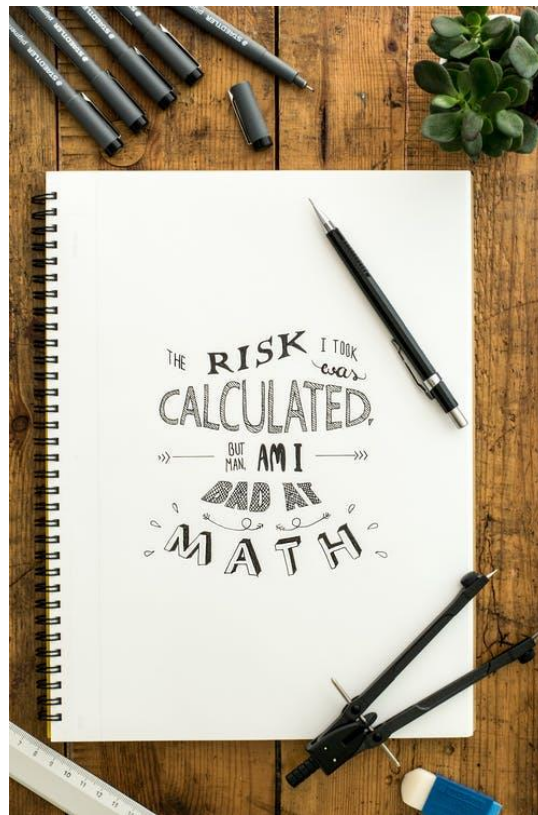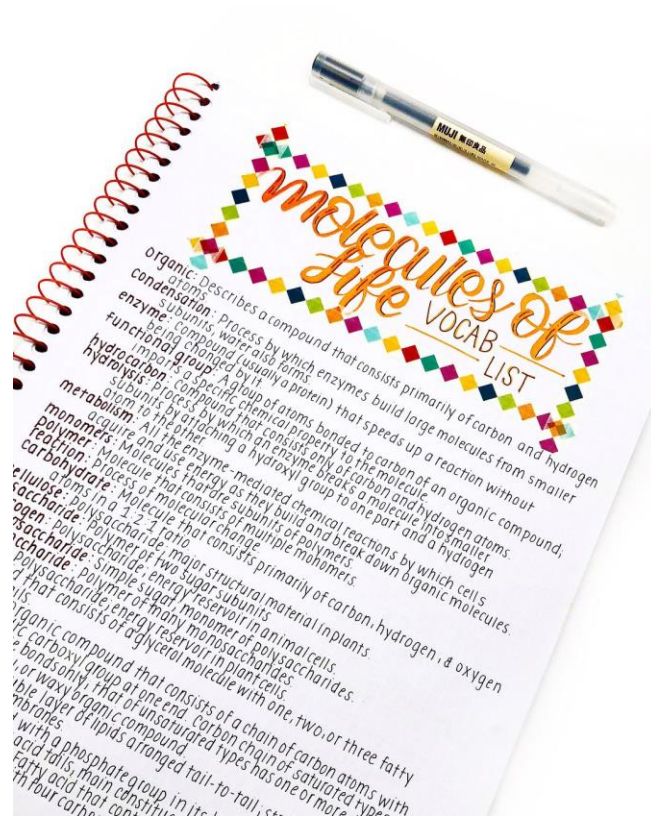
Remember the kid in school whose notes were overkill?

Remember the kid in school whose notes were overkill?

Congrats, you're that kid now.

Clear backup

- Don't make the funder ask for an attachment or a reference
  - More back-and-forth -> longer turnaround time -> laptops out of stock

- Attachments to consider
  - Referenced health officer orders, relevant sections highlighted
  - Referenced funder policies, relevant sections highlighted
  - Referenced contracts and invoices, relevant sections highlighted
  - Side-by-side budgets
  - Documented price estimates

Clear backup

Category	FY20 Approved	Proposed	Change	Description
Personnel	$ 100,000	$ 100,000	$ -	
Special Events	$ 2,000	$ 0	$ (1,500)	Cancelled trainings
Supportive Services	$ 15,000	$ 16,500	$ 1,500	Laptops for clients
Total	$ 117,000	$ 117,000	$ -	

Open Forum

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Client Services Program Coordinator (2-1-1 Line)
Service Delivery | San Diego, CA, USA | Full Time

Help Desk Coordinator
Technology | San Diego, CA, USA | Full Time

Housing Navigation Specialist
Health Programs | San Diego, CA, USA | Full Time

Learning Specialist
Quality Assurance & Training | San Diego, CA, USA | Full Time

Program Assistant, Community Information Exchange
Business and Partnership Development | San Diego, CA, USA | Full Time

Quality Coach
Quality Assurance & Training | San Diego, CA, USA | Full Time

Salesforce Senior Business Analyst
Technology | San Diego, CA, USA | Full Time

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