NACCOM Accommodation Tracker – User Guide

This guide has been created to accompany the *NACCOM Accommodation Tracker*.

Contents

What is the Accommodation Tracker?

The Accommodation Tracker is a spreadsheet tool designed to help NACCOM members track, analyse, and visualise basic information about their services and the people they support.

It is aimed at members who are not currently using advanced Client Relationship Management (CRM) systems, and who are looking for a simple spreadsheet-based tool to manage data on their accommodation projects.

The Accommodation Tracker works in both Microsoft Excel and Google Sheets.

Based on the information that users input into the spreadsheet, the Accommodation Tracker automatically generates key information and graphs on the services provided by your organisation – **including data required to complete the NACCOM Annual Survey.**

The tool has been produced in collaboration with data consultant David Waterfall, with feedback from various NACCOM members, as part of our Data Project. Read more about the project *here*.

In addition to this guide, we have created a step-by-step tutorial *video* on how to use the Accommodation Tracker.

Although the how to guide and tutorial video have been produced using the Excel version of the Accommodation Tracker, the tracker also works on Google Sheets. See here for instructions on *how to upload Excel documents to Google Sheets*.

If you have any questions about the Accommodation Tracker, or this help guide, please contact leon@naccom.org.uk.

Using the Accommodation Tracker

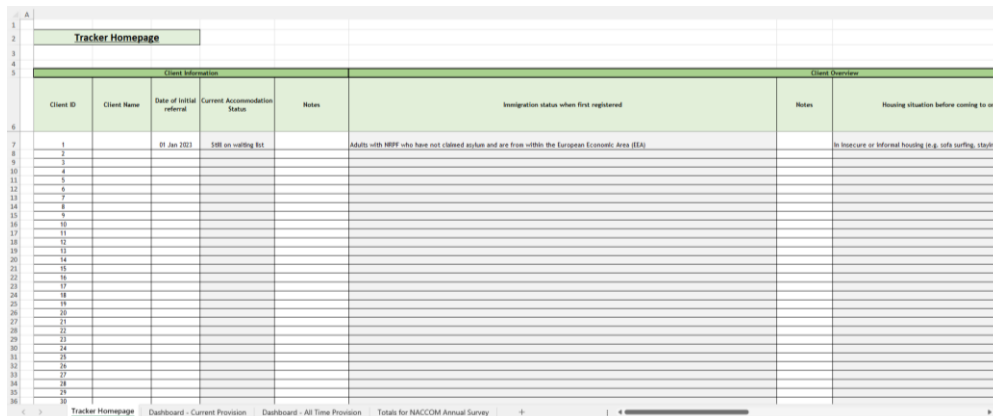The Accommodation Tracker document contains four pages, or 'sheets':

- **'Tracker Homepage'** - the frontpage, where data is entered and stored. This sheet will appear on screen when you open the Tracker for the first time.

- **'Dashboard – Current Provision'** – generates graphs and totals summarising key information on clients currently supported by your organisation.
- **'Dashboard – All Time Provision'** – generates graphs and totals summarising the support provided by your organisation currently and in the past.
- **'Totals for NACCOM Annual Survey'** – provides totals summarising the support provided by your organisation within any customizable time period, designed to be used to answer the questions in our Annual Survey.

Please note - There is an additional spreadsheet called 'Pickups' which is hidden from view and should not be altered or edited by users. It contains the values used to calculate the formulas in the other four spreadsheets.

Spreadsheet 1: 'Tracker Homepage'

The Tracker Homepage is used to record information about the people supported in your services. **It is the only spreadsheet where you will need to input and edit data.**

A screenshot of the 'Tracker Homepage' spreadsheet in Excel.

Each horizontal row of the Tracker Homepage represents one person referred to your service for support. Information about this person is entered into the available columns, grouped into the following six sections:

- Basic Information
- Client Overview
- Accommodation Provided
- Movement Within Service (If Applicable)
- Move-on from Service
- Financial Support

More information on each section can be found in Appendix A of this document.

See our *tutorial video* for detailed instructions on using this page of the Tracker.

Please note -

- All dates must be entered in a xx/xx/xxxx or xx-xx-xxxx format (e.g.: 10/05/1987, or 10-05-1987)

- If a column is shaded grey, an option must be selected from a drop-down list. If you would like to customize the options in drop-down lists, please contact us.
- The numbers appearing in columns shaded light blue (R, W, AQ, and AR) are automatically generated. Please do not enter information in these columns.

Spreadsheet 2: 'Dashboard – Current Provision'

This spreadsheet contains a series of graphs and tables, summarising key information about the services provided by your project and people currently supported. This includes:

- Number of people accommodated / on waiting list.
- Status of people currently accommodated / on waiting list.
- Age of people currently accommodated / on waiting list.
- Previous housing situation of people accommodated / on waiting list.


Why is data visualization important for charities?

New Philanthropy Capital have published a helpful explainer covering the basics of data visualisation, and how charities can use graphs to evidence the impact of their work, including in reports and presentations.

Homeless Link's data analysis toolkit explores the many benefits that analysing data can bring to homelessness services.

Whilst the graphs automatically generated by the Accommodation Tracker are quite basic, they can be easily customised to your liking (i.e.: their colours, size, axis names, title font). See these guides for more information on how to do this in Excel and Google Sheets.
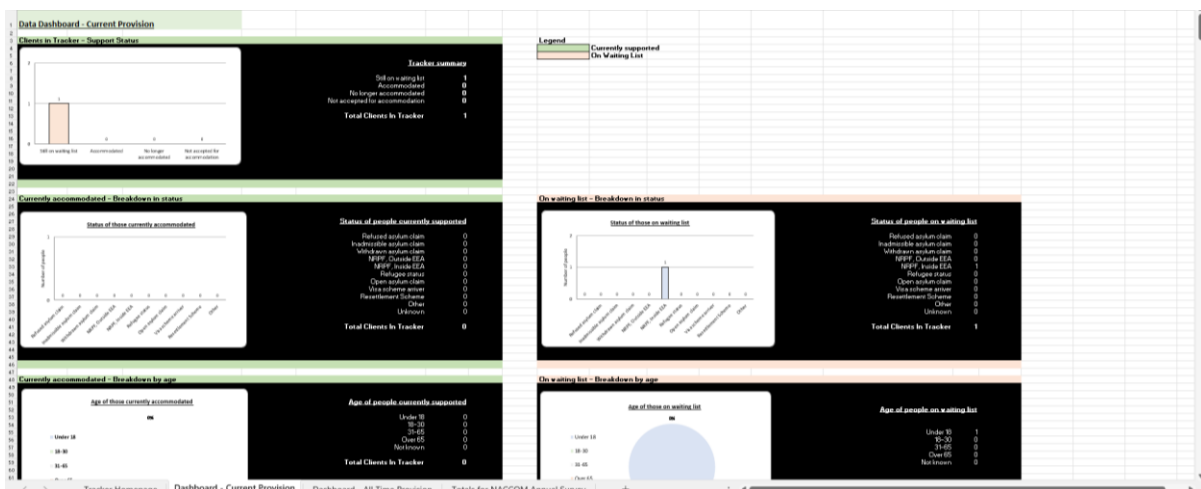
A screenshot of the 'Dashboard – Current Provision' spreadsheet in Excel.

Status of those currently accommodated
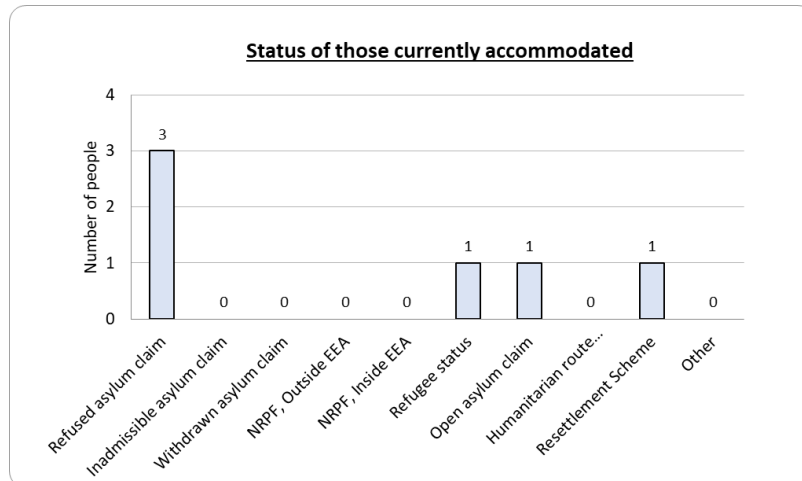
A graph automatically generated by the 'Dashboard – Current Provision' page in Excel.

Spreadsheet 3: 'Dashboard – All Time Provision'

A series of graphs and tables, summarising 'all time' provision – meaning clients currently accommodated, and those who have been accommodated in the past.

This spreadsheet contains the following graphs and tables:

- Number of people supported, by accommodation type.
- Days of accommodation provided, and average time spent in each accommodation type.
- Number of people supported, by status at time of referral.
- Number of people supported, by housing situation at time of referral.
- Number of people supported, by age.
- Number of people that have moved-on from services, by move-on reason.
- Number of people that have moved-on from services, by move-on housing situation.
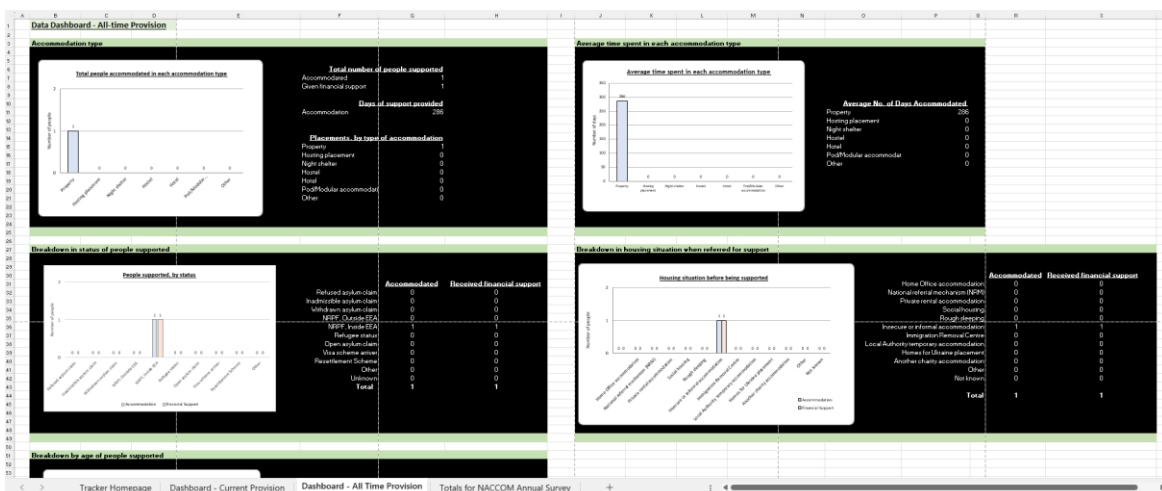
A screenshot of the 'Dashboard – All Time Provision' spreadsheet in Excel

Spreadsheet 4: 'Totals for NACCOM Annual Survey'

The final spreadsheet automatically generates a series of totals and figures, for any time period of your choice. This could be the calendar year, the financial year, or the NACCOM Annual Survey period.
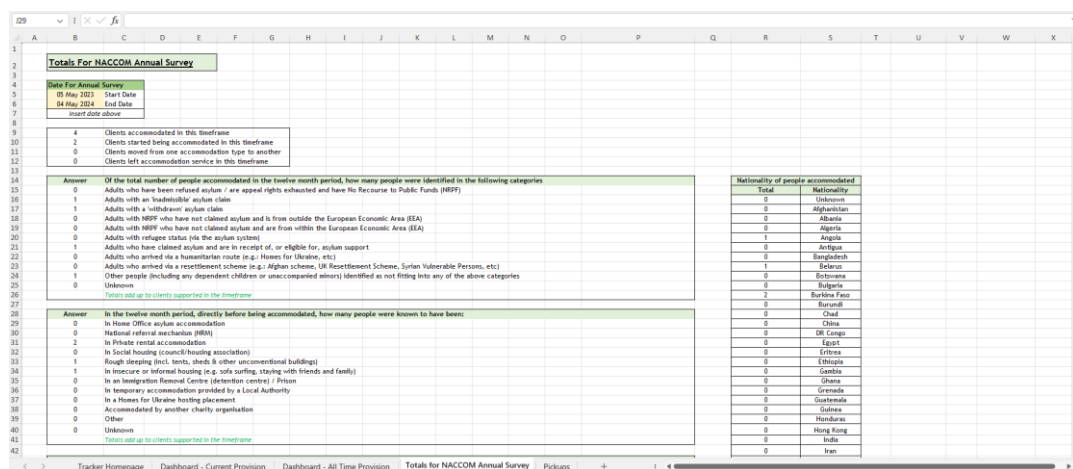
You can select the time period by entering the Start and End dates into the 'Reporting period' box in the top-left corner of the page, as shown below:

Screenshot of the 'Reporting Period' box

The spreadsheet will then automatically generate a range of totals which summarise key information on your services and the clients supported by your organisation, in that chosen period.

Although the Tracker does not provide answers for the whole Annual Survey, it automatically generates the totals required for nine survey questions, including several mandatory questions on the people accommodated by your services.

Screenshot from the 'Totals for NACCOM Annual Survey' spreadsheet in Excel.

Please note - If the message '*Error - totals do not match clients supported in the timeframe*' appears in either cell C25 or C40, it will likely be caused by an error in columns G and I of the 'Tracker Homepage' spreadsheet.

Check these columns for irregularities and get in touch if you are unable to troubleshoot the error.

Please contact leon@naccom.org.uk if you have any further questions about using the Accommodation Tracker.

![NACCOM - THE NO ACCOMMODATION NETWORK]

Appendix A – List of columns in 'Tracker Homepage'

Basic Information

- Column B – Client ID
- Column C – Client Name
- Column D – Date of Initial Referral
- Column E - Current Accommodation Status (i.e.: Still on waiting list, Accommodated, No longer accommodated, or Not accepted for accommodation)
- Column F – Notes (space for additional comments)
- Column G – Days on waiting list / before being accommodated

Client Overview

- Column H - Immigration status when first registered
- Column I – Notes (space for additional comments)
- Column J - Housing situation before coming to organisation
- Column K – Notes (space for additional comments)
- Column L – Gender
- Column M – Age
- Column N – Nationality
- Column O – Notes (space for additional comments)

Accommodation Provided

- Column P – Type of Accommodation
- Column Q – Notes (space for additional comments)
- Column R – Date Accommodation Started
- Column S – Date Accommodation Ended (if applicable)
- Column T – Days elapsed

Movement Within Service

- Column U, Z, AE – Type of Accommodation (first, second, and third move within service, if applicable)
- Columns V, AA, AF – Notes (space for additional comments)
- Columns W, AB, AG – Date Accommodation started (first, second, and third move within service, if applicable)
- Columns X, AC, AH – Date Accommodation Ended (first, second, and third move within service, if applicable)
- Columns Y, AD, AI – Days elapsed (first, second, and third move within service, if applicable)

Please note - The tracker contains space for three 'moves' within your accommodation service, although only one 'move' (columns S – W) will be visible

when you open the spreadsheet for the first time. The rest can be revealed by unhiding columns Y-AG (see how to do this in Excel and Google Sheets).

Move-On From Service

- Column AJ – Date of Move-on
- Column AK - Reason for moving on from service
- Column AL - Notes (space for additional comments)
- Column AM - Housing situation after move-on (if known)
- Column AN - Name of relevant local authority, charity organisation, or housing association (if known)

Financial Support

- Column AO - Received financial support?
- Column AP - Notes (space for additional comments)
- Column AQ - Date Financial Support Started
- Column AR - Date financial support ended
- Column AS - Period (days) receiving financial support

Total Days Accommodated

- Column AT - Total Days Accommodated (automatically calculates the total period that the client has been supported in your accommodation service).

Please note - For this figure to be accurate, you must ensure that all relevant 'Date Accommodation Started' and 'Date Accommodation Ended' columns are correct.