

Supportive Housing Case Study

Tenderloin Housing Clinic

There is a trust component that is built into the work we're doing with implementing Salesforce and that has huge implications in terms of ownership and buy-in. Salesforce is changing the way we think about the programs and services we provide to clients. The system will connect all of our staff (who operate in 20+ locations) to provide a quality continuum of services to clients.

– Kristin Dorage, Tenderloin Housing Clinic

Organization Overview

Tenderloin Housing Clinic is the largest provider of supportive housing to formerly homeless adults in San Francisco. In 2015 THC and Bigger Boat Consulting began a journey to transform the way THC staff work with one another and their clients. The first phase of the project focused on streamlining their client enrollment process to promote communication and collaboration, reduce paper and time between enrollment stages, and deliver easy and timely access to program and client data. The goal was to provide THC staff more time for client interaction so they can provide the additional support needed to keep people housed.

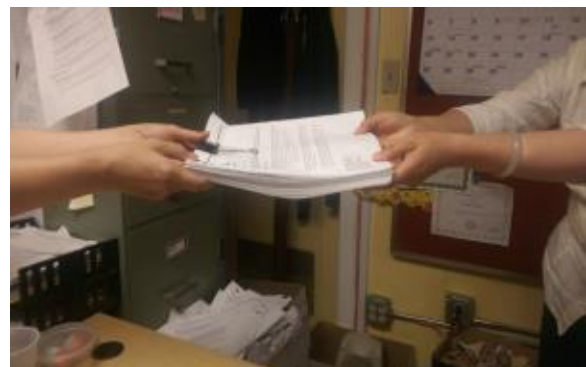
For THC, a typical enrollment starts with a referral from a partner organization. The client meets with a Housing Counselor to understand the THC program benefits and requirements and ensure sufficient financial support is available. Dependent upon the program, the client might meet with other members of the supportive housing team (Supportive Housing Manager, Case Manager) to confirm the match.

Upon program acceptance, the client will meet once again with a Housing Counselor to sign contracts and make initial rent payment. Rental

Accounts uses the information to create rent charge, apply payments, issue any balance disbursements, and set up ongoing financial management. With 10 distinct programs, 19 buildings, 6 funders, and 20+ sources of client benefits, there are many departures from this typical process.

Challenges

Like many organizations, this process was paper-based. Information was written down on pre-printed paper forms that were passed between departments.



Some information was entered into inflexible legacy databases and departmental spreadsheets while other information remained

only on paper. Housing Counselors would commonly spend 15 minutes filling out forms for client signature and distribution to external entities during client appointments. Most of the forms were simply rewriting the same client and program information over and over again. Housing Counselors struggled to determine which of the 50+ forms they needed to fill out for any particular client based on their income, program, and building. Reporting on client enrollment and programs required calling an in-house software developer, and waiting.

This process presented several problems for THC:

- Information was hard to find
- Significant time lags between enrollment stages
- Duplication of effort
- Outdated, incomplete, and/or inaccurate information

THC managed to deliver quality services and meet funding objectives despite all these challenges, but it wasn't easy. They were simply working too hard and they knew they could do more!

Going completely paperless was not realistic for THC. External parties require paper-based communication, as do clients. What they can do is reduce the paper, streamline how they work with it, and make the information on the paper accessible to those who need it when they need it.

Here's how Bigger Boat partnered with THC to address their challenges along with some tips for those considering a similar path.

Streamline Operations by Reducing Paper

THC reduced paper by eliminating forms used for internal communications. Housing Counselors now enter data directly into Salesforce while talking with the client, and that information is accessible by Rental Accounts

and Program Managers immediately. More details are collected about the client, referral, income, building and significant milestones of the enrollment process (hotel interviews, follow-up appointments with referrers, and move-in dates).

Turning a paper process into a computer-based process was a big change for Housing Counselors, who really want to focus on the client in front of them. To help acquaint them with the new terminology, information, and steps, we built a simple visual flow to walk them through the screening stage where a majority of the client information was collected. The team needed more time to understand the new process, what worked, and what didn't. The flexibility of Salesforce helped us adapt to changes quickly with minimal investment.

As the client progresses through enrollment, their enrollment status changes helping the Housing team track their progression. Salesforce Dashboards, List Views, and Chatter feeds notify the Rental Accounts Specialist assigned to the client to review their enrollment and take the final steps.

Automate Tasks to Increase Staff Time Working Clients

Paper is still a fact of life for THC. Many referrers, funders, and regulators still have paper-based requirements. However, Salesforce generates and prints these forms on demand. Now the Housing Counselor simply clicks a button on the client record and the client's screening packet is generated, including all the required forms with the client's information pre-printed.

Allow Quick Access to Key Client Information

Important information is at the top of the client's page and images are used to quickly convey critical elements to staff. This allows the Housing Counselors to quickly familiarize themselves with the client.

Improve Communication Around Critical Client Events

Individual communications between people in a variety of formats (email, paper, instant messaging) were replaced by Chatter posts in Salesforce. Key events like changes in income or benefits are recorded and automatically posted in Chatter. This makes them visible right on the client's record and also in a feed for each Rental Accounts Specialist to see just the news for their clients.

This increased awareness of significant events helps improve a client's ability to remain housed. This also improved the accuracy of information and reduced the volume of communications as one post shares information to everyone who needs to know. Since Chatter posts are searchable, staff can easily find historical information and significant events.

Provide Timely and Relevant Program Information

Dashboards with enrollment and program statistics are available and personalized for various roles.

The Enrollment Dashboard allows the managers to quickly identify how many people are at each stage of the enrollment lifecycle so they can monitor and take action.



About Bigger Boat Consulting

Bigger Boat Consulting builds program, client, and donor management solutions for human services organizations. To learn more, please contact us at info@biggerboatconsulting.com or visit our website, www.biggerboatconsulting.com.

Program and Department Managers can generate personalized reports without developer assistance. Charts are included in program detail pages to provide at a glance information about the program.

Summary

In the months surrounding deployment, THC started a new program and opened two new buildings. Thanks to the flexibility and the process automation tools of the Salesforce platform, along with good decisions by the team and a lean project process, we were able to adapt. The THC enrollment process now uses less paper, has more accurate and timely information, and encourages communication.

It may sound like a simple concept, but to be on the same page about a client's situation in an agency the size of ours, is really revolutionary! Getting transparency into our colleagues' work, streamlining processes across departments, and opening up the doors for clear communication is really a game-changer for THC.

– Kristin Dorage, Tenderloin Housing Clinic

THC's journey is not complete, which is why we work directly with users throughout the project, constantly learning more about how to make them more successful. Stay tuned as Bigger Boat and THC continue to engage the THC team to accomplish their mission: get and keep people housed.