



# Overcoming Barriers:

Maximizing  
Salesforce  
for Workforce  
Development



## Executive Summary

Individuals seeking workforce reentry face a lot of barriers. Human services organizations and social workers are passionate about helping those who need assistance overcome these obstacles and gain long-term employment through education, advocacy, and services. But those organizations face their own obstacles in uncovering and tracking all the factors that prevent program participants from finding long-term employment success.

Using Salesforce, these organizations can uncover a holistic view of every program participant, allowing social workers to better understand their barriers. With this knowledge, they can work to improve referrals and services to help their clients find employment. This unification of data enables organizations to not simply track those who successfully reenter the workforce, but also to gain valuable insight into those who have not been successful.

Ultimately, the Salesforce platform allows workforce development organizations to put their focus where they would like it to be: on the participants.

## A need for workforce development programs—and the tools to effectively manage them

About 1.2 million Americans have been unemployed long-term,<sup>1</sup> which economists consider to be 27 weeks or longer. That number promises to increase as the economy falters due to COVID-19.

For many of those unemployed members of our communities, factors such as a criminal record, dependency issues, or lack of education stand in the way of their long-term employment.

That's where nonprofits and human services organizations come in; many have workforce development or jobs programs that serve people with criminal records, youths, or struggling adults who just need a helping hand to escape a tough situation. These programs play a vital role in keeping communities safe and secure by providing employment for all individuals no matter their previous circumstances—and as the economic impact from COVID-19 leads to more people being out of work, the need for workforce development programs and tracking their results will become even more important.

The Safer Foundation, in Chicago, Illinois, is one example of a successful workforce development program. Safer promotes workforce reentry and reduces recidivism through employment, education, and support services for people with criminal records. Safer has served more than 5,800 clients and been directly responsible for more than 3,300 job starts, 74% of whom retained their jobs for a year.<sup>2</sup> Through its Pivotal Staffing Services and Reconstruction Technology Partners subsidiaries, Safer is becoming one of the largest employers of people with records, in addition to placing clients with external employers.

Between 2015 and 2017, participants in Safer's Training to Work program had just a 9% recidivism rate, compared to a 44% national rate over the same period.<sup>3</sup>

That's just one example of the power of employment.



1.2mil  
Americans  
unemployed  
>27 weeks

<sup>1</sup> "News release," Bureau of Labor Statistics, U.S. Department of Labor, June 5, 2020. [www.bls.gov/news.release/pdf/empsit.pdf](http://www.bls.gov/news.release/pdf/empsit.pdf)

<sup>2</sup> "Reshaping Reentry. Safer Foundation Annual Report 2018," Safer Foundation.

<sup>3</sup> "Training to Work 1 & 2 Program Report," Safer Foundation, 2017.

Participants must stay on the job for **180 days** for program funding



Unfortunately, many program participants face obstacles to their continued employment. If they don't remain at the job for at least 180 days, they aren't considered to have successfully completed the program and the program won't receive funding.

If nonprofits and human services organizations can confront all obstacles for participants, though, they can drive up the rate of success significantly. To do that, they need a deep view into each program participant and the factors that will contribute toward their long-term employment success—or failure.

Getting that holistic view is nearly impossible with the legacy systems now in use at most nonprofits and human services organizations.

There is a solution to that challenge, though: Salesforce can break down barriers between the disparate databases and processes organizations are using.

This white paper looks at the challenges to unifying data, how those challenges interfere with participant and program success, and how Salesforce and Provisio can solve this problem.

## Fundamental barriers to reentry/workforce development:



Restricted access to education—colleges request access to criminal history



The need for occupational licensing



Access to permanent housing



Legal obligations because of debt



Lack of affordable childcare



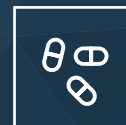
Minimum-wage jobs don't pay enough to support the family, making it more affordable to rely on unemployment help



Denial of security clearance because of their history



Lack of consistent transportation



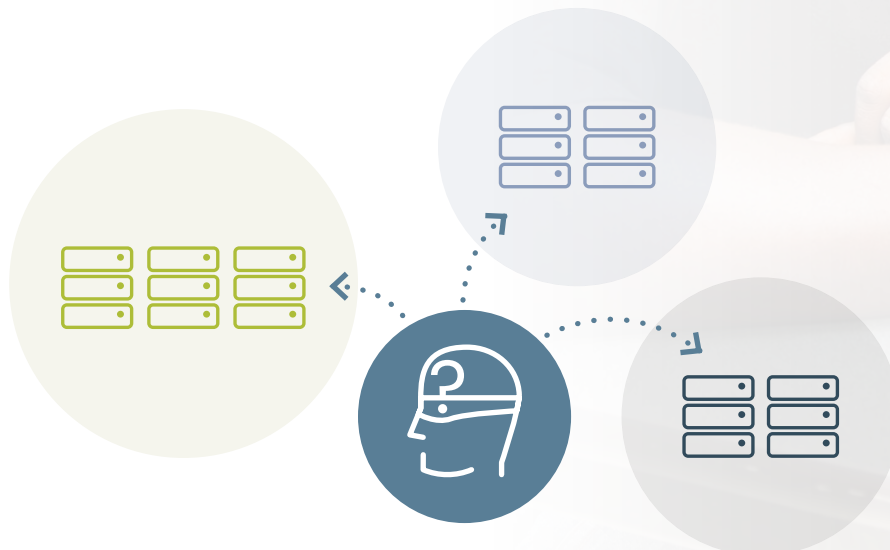
Substance abuse issues interfering with maintaining a job or doing the job to the best of their ability

## The obstacles to overcoming obstacles

“Every organization with a jobs program wants a bird’s eye view of not only the individuals in their programs, but also the families themselves, because those outside factors can have a huge influence on whether or not an individual is going to be able to retain employment,” says Travis Bloomfield, Managing Partner and CEO of Provisio Partners, a consulting and technology company that works exclusively with nonprofits and public sector human services organizations.

With that bird’s eye view, organizations can assist participants in addressing all their obstacles.

Too often, though, organizations are unable to truly see holistically into each participant and get a gauge for all their struggles. This is because organizations are relying on siloed data systems. Furthermore, funding and eligibility requirements are constantly changing, making it difficult for staff to fully understand all the services for which a client may be eligible. As a result, a client may be eligible for multiple programs, but because the disparate information doesn’t connect, nobody will know to refer them to those other programs.



“Every organization with a jobs program wants a bird’s eye view of not only the individuals in their programs, but also the families themselves.”

## The obstacles to overcoming obstacles *continued*

This disconnect of the data also results in inaccurate reporting due to the inability to deduplicate clients served within an organization. This challenge ultimately stands in the way of program improvements.

“The important number is understanding where people are falling down in their quest for employment.”

“The important number is not how many people got jobs,” Bloomfield says. “The important number is understanding where people are falling down in their quest for employment. And how many barriers were overcome by that individual to retain employment.”

Nonprofits have been using legacy software applications for years, but those solutions haven’t been able to modernize with the times and are largely forms-based, with data in the background. Data can be easily entered but is difficult to extract and report upon.

That’s changing. Using the Salesforce platform, organizations can create a customized system that puts the focus of workforce development organizations where it should be: on the participants. By providing a holistic view of clients, Salesforce allows organizations to link participants with the programs that can impact their long-term success.



## Legacy Software Solutions:

- Cannot modernize with the times



- Are largely forms-based with data in the background



- Are difficult to extract and report from



## A platform for change

Rather than a software package, Salesforce is a platform, so it provides the flexibility to adapt to a specific organization and program. It allows organizations to easily configure the system for their ways of doing intake and assessments and automate to make those processes smoother and faster.

With the Salesforce Nonprofit Cloud and Provisio custom solutions, organizations can manage their whole business in one centralized platform, eliminating the barriers between data and processes. Nonprofit cloud includes the Nonprofit Success Pack (NPSP), a free and open-source app built for nonprofits, with out-of-the-box capabilities and a relationship-first view of all the people in your universe. NPSP turns the Salesforce CRM into a constituent relationship management system for nonprofits.

Perhaps most importantly, **Salesforce allows for the easy extraction of data**, so organizations can get a truer view of their numbers and where they're not having success. Salesforce reports and dashboards put drag-and-drop reporting capabilities in the hands of every user. Tableau CRM ups the game with responsive dashboards that enable organizations to visualize their data and get a clear measure of their program's impact with real-time insights into the who, what, where, and how.



## Together, the Nonprofit Cloud and Provisio custom solutions enable organizations to:



Represent a household so that participants are viewed in the context of their family's full need



Break down silos among fundraising, marketing, programs, and leadership by giving everyone a contextual, shared view of all constituents



Track different types of programs and services, regardless of complexity; as the programs develop or grow, the platform can evolve with them



Tie grant funding to programs



Measure fundraising performance and report impact to stakeholders

“With improved reports, our partners can visually see what their clients’ stories look like,”

“With improved reports, our partners can visually see what their clients’ stories look like,” Bloomfield says. “That lets them effectively tell the story of an individual who was successful and also tell the story of a participant who didn’t make it through their program. With that story, organizations can make real decisions on how to improve that piece of the process.”



To help organizations discover any fundraising gaps or pitfalls before it is too late, Tableau CRM enables fundraising teams to review their targets against their goals for the year.



Tableau, meanwhile, simplifies the understanding of fundraising relationships by providing deep data into donor behavior to make it clear how supporters are interacting with the organization. This level of insight allows for targeted program stories to help grow donor support.



Salesforce enables a mobile workforce by allowing volunteers and organizations, and organizations and clients, to interact remotely. Salesforce Communities, meanwhile, allow clients direct access to information and services.

Remote access was gaining more importance even before COVID-19 hit. The pandemic has accelerated the need for mobile technologies that allow for remote program access. Salesforce meets this need.

With the data from Salesforce, organizations can:



Perform intake to better understand the individual and their household situation



Complete assessments to determine if the individual is a good fit for the jobs program—and what issues may block their path to success



Manage the process as the individual goes through the program(s) and into the workforce



## The importance of the right partnership

Selecting the right solution is important—and so is partnering with consultants who understand workforce development programs and their unique situations.

At Provisio, we've worked with workforce development programs in every corner of the country, so we know how they work—and know what doesn't work. Using our knowledge, we help organizations understand how to utilize the data they get from Salesforce so they can optimize processes and get the true story of the program and its participants.



We exclusively deploy Salesforce with our software customizations. Rather than focusing on “case management” as a single function, this solution provides a forward-looking, holistic view of the entire organization, turning the concept of being data-informed into reality.

Through the utilization of Salesforce’s Tableau CRM, organizations can efficiently look forward to plan for tomorrow.



# Salesforce and Provisio Partners solutions enable organizations to complete the following:



Intake



Assessment



Programs



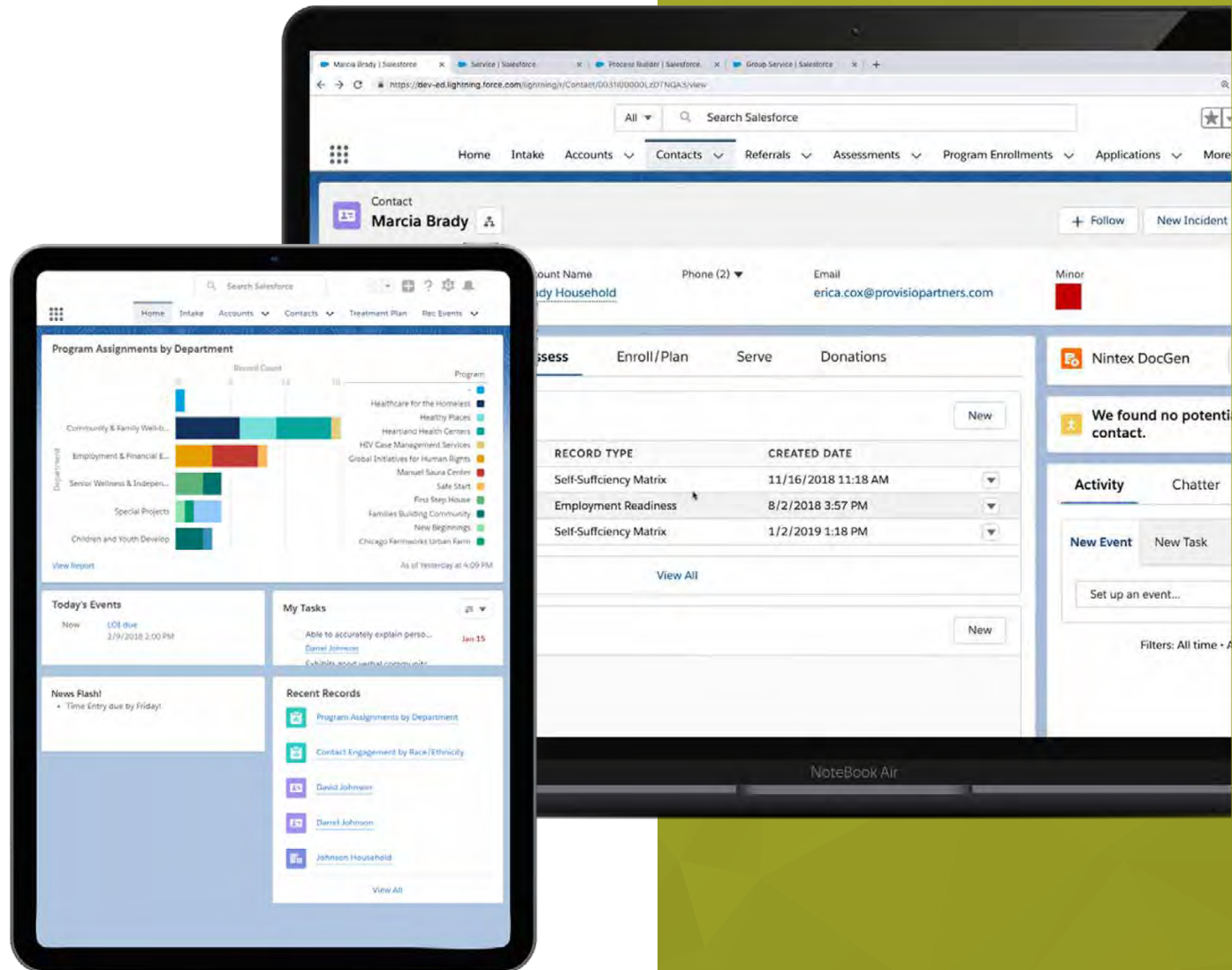
Service Delivery



Compliance



Measurement



## Conclusion

The ability to manage programs and services while being data-informed is critical to future impact. The Safer Foundation is proof of that.

Enabling the type of success Safer has experienced requires understanding all the challenges clients are dealing with that can impact continued employment. When organizations have that depth of knowledge, they can find the resources to help those people holistically, and ultimately the individual and the program will be more successful.

Legacy software solutions currently in use in most nonprofits and human services organizations don't allow for that holistic view. But Salesforce does.

Salesforce enables workforce development programs to not only break down barriers, but also to help the organization focus on the individual—while Salesforce handles the data side. And with the help of Provisio's consulting expertise, your organization can realize the reality of being data-informed.

Visit [www.provisiopartners.com/get-started](http://www.provisiopartners.com/get-started) to sign up for a consultation.

## ABOUT PROVISIO PARTNERS

Founded in 2017, Provisio Partners is focused on empowering changemakers with the right-fit Salesforce solution so they can connect their one, true mission with the people who need it the most. Provisio Partners is located in Chicago, Illinois. Learn more at [www.provisiopartners.com](http://www.provisiopartners.com).



(312) 724-8228



[www.provisiopartners.com](http://www.provisiopartners.com)