

Program and case management in Salesforce's Nonprofit Cloud



Introductions



Presenters



Chrissy Thompson

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Salesforce



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Manager, Salesforce Nonprofit Solutions
RSM

The firm - RSM







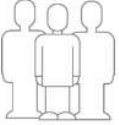




Global reach, national strength, local touch

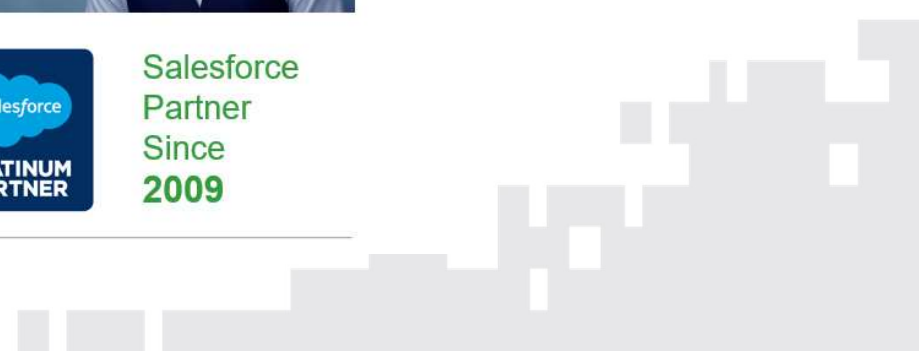
Business advisors who take time to understand your industry, your goals, your opportunities

RSM International is a **global network** of independent audit, tax and consulting firms.



RSM – a leader in the Salesforce Consulting Partner Ecosystem

 <p>RSM US is one of the leading Salesforce consulting partners focused on the middle market</p>	 <p>AVERAGE RATING</p> 	 <p>INDUSTRIES Nonprofits & Associations Technology -TMT Manufacturing - Industrials Business & Professional Services - BPS</p>
 <p>4.9/5</p> <p>CSAT RATING SALESFORCE PARTNER PROGRAM</p>	 <p>800+ Salesforce customers</p>	 <p>Global and regionally based Salesforce team members</p> <ul style="list-style-type: none"> • Architects • Consultants • Developers • Project Managers
	<p>Engagement Models Assessments Scoped Projects Retained Teams</p> 	<p>400+ Salesforce Certifications</p> 
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Forward-Looking Statement

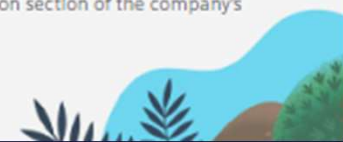
Statement under the Private Securities Litigation Reform Act of 1995:

This presentation contains forward-looking statements about the company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, diluted earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, the one-time accounting non-cash charge that was incurred in connection with the Salesforce.org combination; stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth and sustainability goals. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the company's results could differ materially from the results expressed or implied by the forward-looking statements we make.

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Further information on these and other factors that could affect the company's financial results is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings it makes with the Securities and Exchange Commission from time to time. These documents are available on the SEC Filings section of the Investor Information section of the company's website at www.salesforce.com/investor.

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Adapting to Today's Reality

 salesforce.org



Your Services

The need for services doesn't stop
Integration and compliance requirements are ever changing
Staff turnover is at an all time high



Your Clients

How can the funding team collaborate with the programs team to achieve desired outcomes, at scale?

 salesforce.org



Provide, Track and Collaborate on Impact, Strategy, and Outcomes



Improve Staff Retention



Adhere to Compliance and Integration Requirements



Linked slide | ✖

Nonprofit Cloud

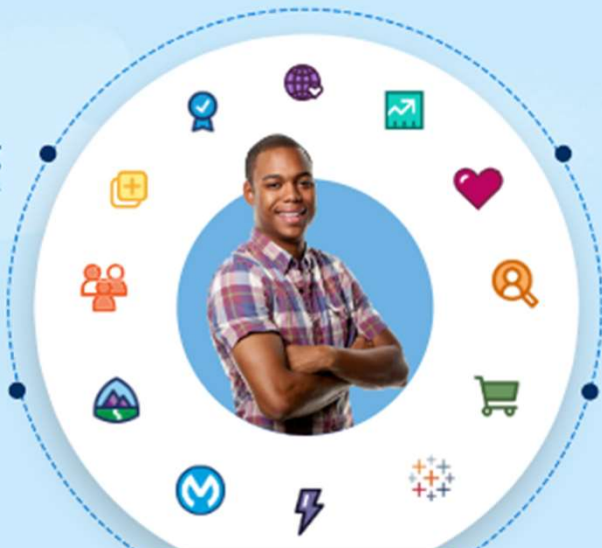
One integrated platform to transform digitally for the new normal

Fundraising
Create Donor-Centric Experiences

Program Management
Amplify Program Impact

Marketing & Engagement
Find and Engage Lifelong Supporters

Grants Management
Simplify and Accelerate Grantmaking



Nonprofit Success Pack

87%

Salesforce nonprofit customers report that their information is more centralized, easier to access, increasing transparency



Where do we help?

Before Care

Potential Clients

- Referrals
 - Outreach
 - Reporting
- Intakes
 - Documents
 - Assessments
- Engagement
 - Reminders
 - Appointments

During Care

Active Client

- Case Management
 - Goals & Tasks
- Benefit Delivery
 - Assignments
 - Disbursements
 - Outcomes
 - Sessions
- Notes
- Assessments

Post Care

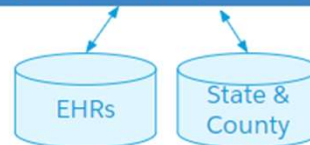
Graduated or Post Care

- Cross Enrollments into new programs
- Reporting for payments
- Audits by funder
- Leverage data for new funding and grants

Engagement (aka Marketing)

Collaboration & Efficiencies (Slack, Experience Cloud, Einstein)

Integration & Analytics (MuleSoft, Tableau, DataCloud)

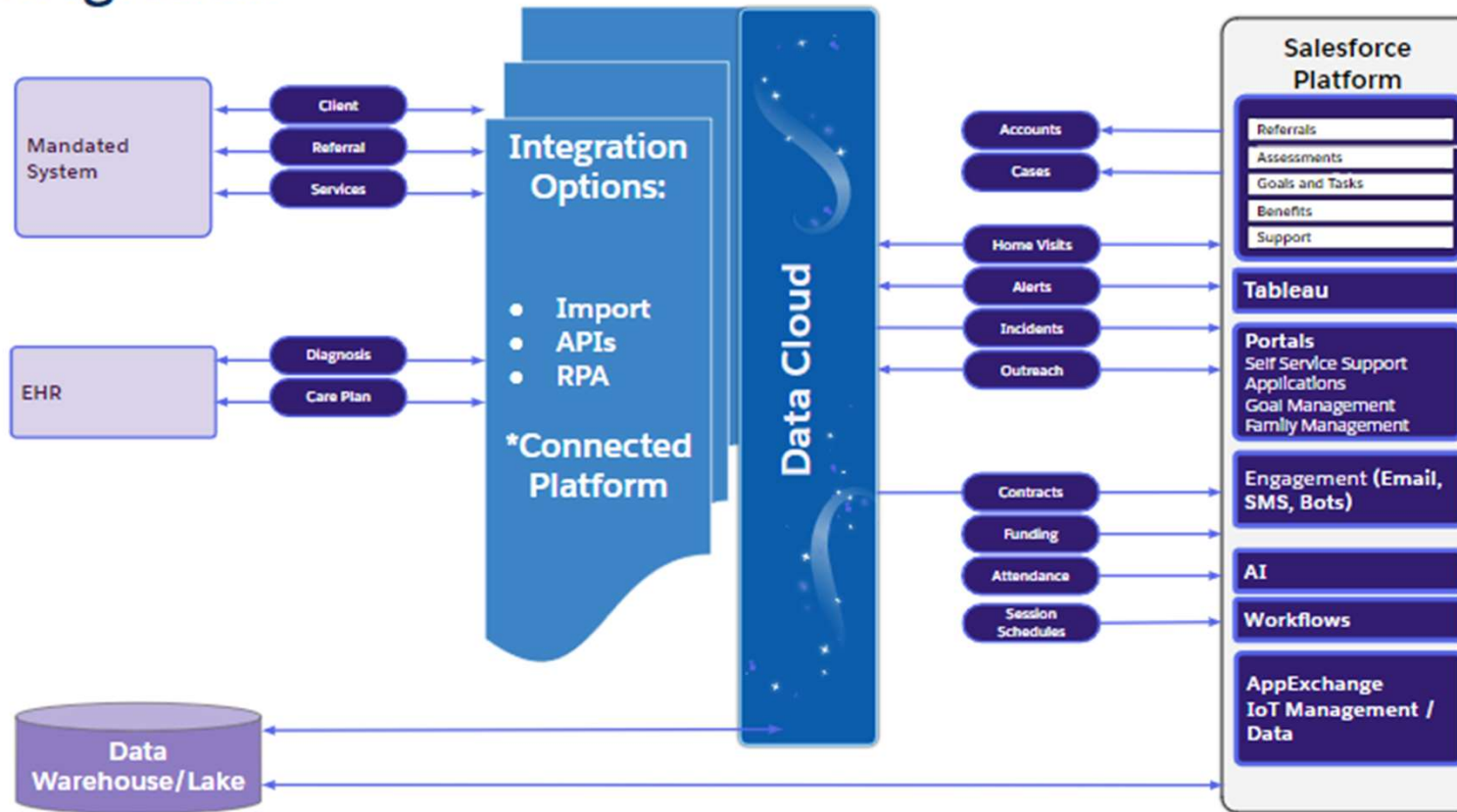


Integration Options:

1. File Import/Exports
2. APIs (prebuilt or custom)
3. No API Access - RPA



Integration





We Launched Salesforce Data Cloud

Hyperscale data platform powering the World's 1st **Real-Time** CRM



Real-Time Flow Automation

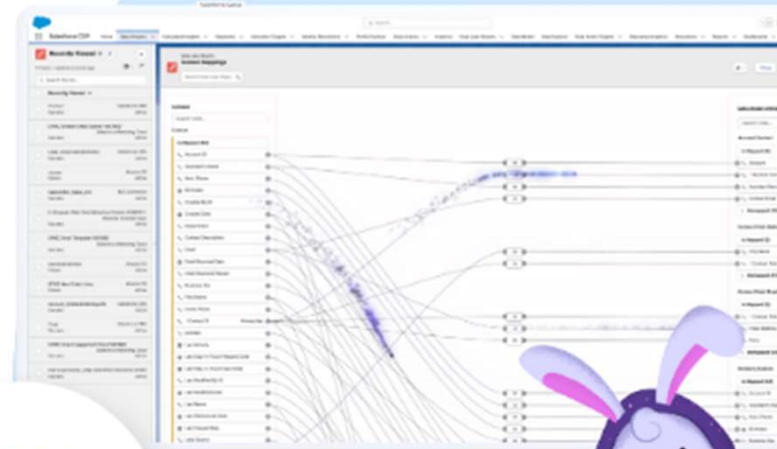
Real-Time Einstein AI

Real-Time Hyperscale Data Platform

Transactional Database

Hyperforce

100B
records
processed daily



Homeless Manage... Home

Contact **Alex Bailey**

Birthdate: 9/2/1959 | Age: 63 | Phone: (276) 555-0197 | Veteran Verification Status: **UNVERIFIED**

+ Follow | Upload ID | Submit for Approval | Case Worker

Details | Assessments | Referrals | Cases | Benefit Assignments | Goal Assignments | More

Contact Name: **Alex Bailey**

Age: **63**

Time in Area: **3 months**

Bus Pass: 13

Phone Charger: 6

Food Bank: 4

Shower: 4

WiFi Access: 4

Categories of Assistance

#	Category	Service Type	Start	End Date	Status
1	Food Assistance	SNAP	1/7/23	2/3/23	Applied
2	Housing Assistance	LA Public Housing	1/8/23	3/4/23	Incomplete Application
3	Housing Assistance	SNAP	1/8/23	4/5/23	Ineligible
4	Food Assistance	SNAP	1/8/23	2/3/23	Receiving Benefits
5	Food Assistance	Food Bank	1/8/22	1/6/22	Received

Medical Assistance

Education Assistance

Food Assistance

Transportation Assistance

Disability Assistance

Veterans Administration

Employment Assistance

Filters: All time · All activities · All types

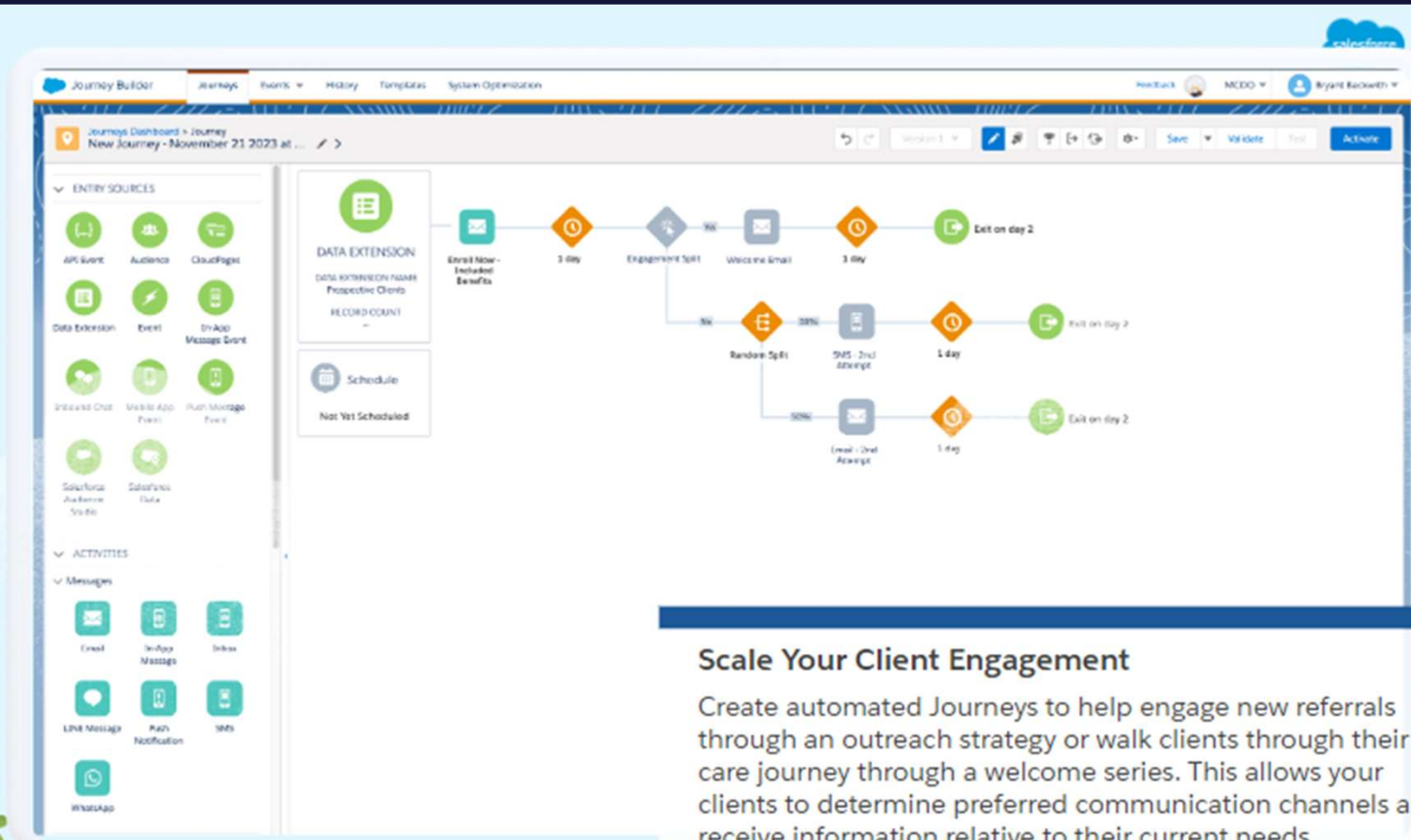
Refresh · Expand All · View All

Upcoming & Overdue

Harmonizing Data

Extract and harmonize data in a way that helps your staff see a clear picture of the client using data that may not live within Salesforce.



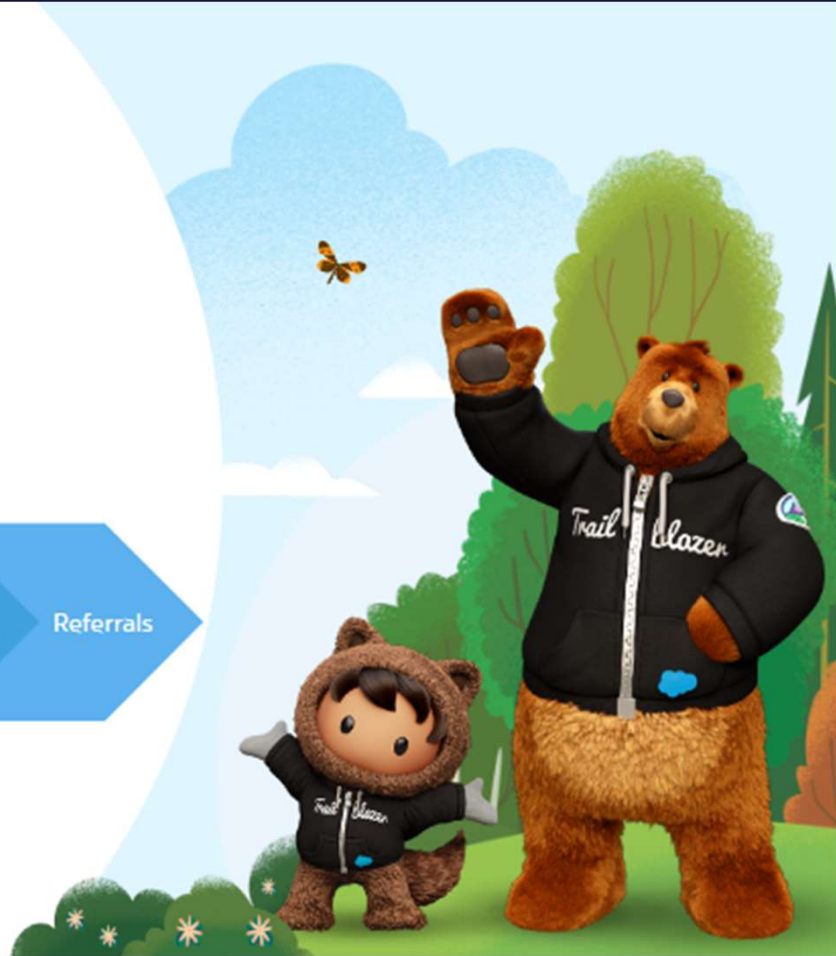


Scale Your Client Engagement

Create automated Journeys to help engage new referrals through an outreach strategy or walk clients through their care journey through a welcome series. This allows your clients to determine preferred communication channels and receive information relative to their current needs.



Before Care



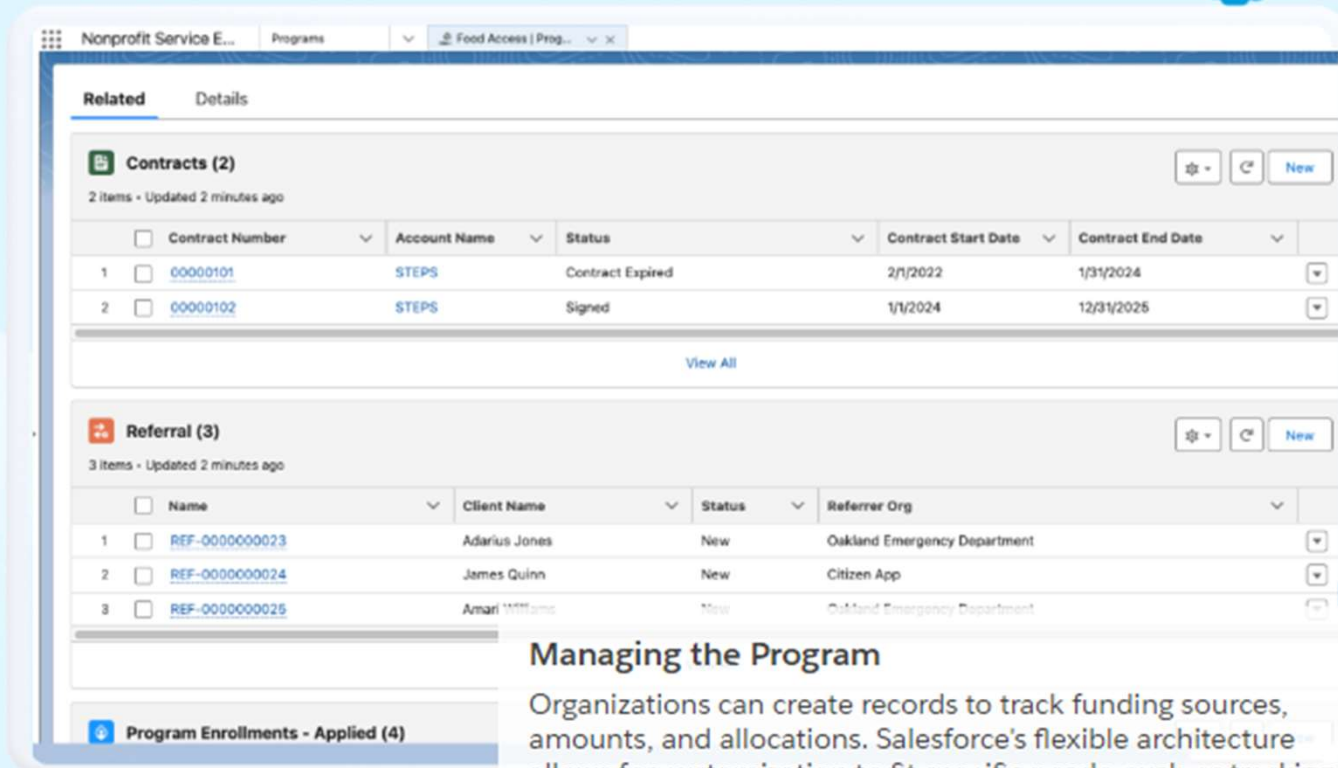
MEET LUKE

Luke is a Program Manager at a fictitious organization named STEPS. Luke's job is to manage and analyze the funding, performance, and outcomes of a program.

Luke can easily toggle from program to program to better understand associated funding contracts, benefits within each program, total referrals and enrollments, along with measuring outcomes towards their impact strategy goals.



Contracts and Funding



The screenshot shows a Salesforce interface for a 'Nonprofit Service E...' with a 'Programs' dropdown menu. The active program is 'Food Access | Prog...'. The interface displays two related lists:

- Contracts (2)**: A table with 2 items, updated 2 minutes ago. Columns include Contract Number, Account Name, Status, Contract Start Date, and Contract End Date.

	Contract Number	Account Name	Status	Contract Start Date	Contract End Date
1	00000101	STEPS	Contract Expired	2/1/2022	1/31/2024
2	00000102	STEPS	Signed	1/1/2024	12/31/2025
- Referral (3)**: A table with 3 items, updated 2 minutes ago. Columns include Name, Client Name, Status, and Referrer Org.

	Name	Client Name	Status	Referrer Org
1	REF-0000000023	Adarius Jones	New	Oakland Emergency Department
2	REF-0000000024	James Quinn	New	Citizen App
3	REF-0000000025	Amani Williams	New	Oakland Emergency Department

At the bottom of the interface, there is a link for 'Program Enrollments - Applied (4)'.

Managing the Program

Organizations can create records to track funding sources, amounts, and allocations. Salesforce's flexible architecture allows for customization to fit specific needs, such as tracking grant cycles, budgets, or donations.



Q Branch

Q Home

Demo Wizard

Demo Tools

Demo Component

Referrals



Actionable Lists

All Actionable Lists ▼



2 items • Sorted by Name • Filtered by All actionable lists • Updated an hour ago

	<input type="checkbox"/> Name ↑	Object Name
1	<input type="checkbox"/> High Risk Referrals	Account
2	<input type="checkbox"/> My Referrals Assigned to Me	Account

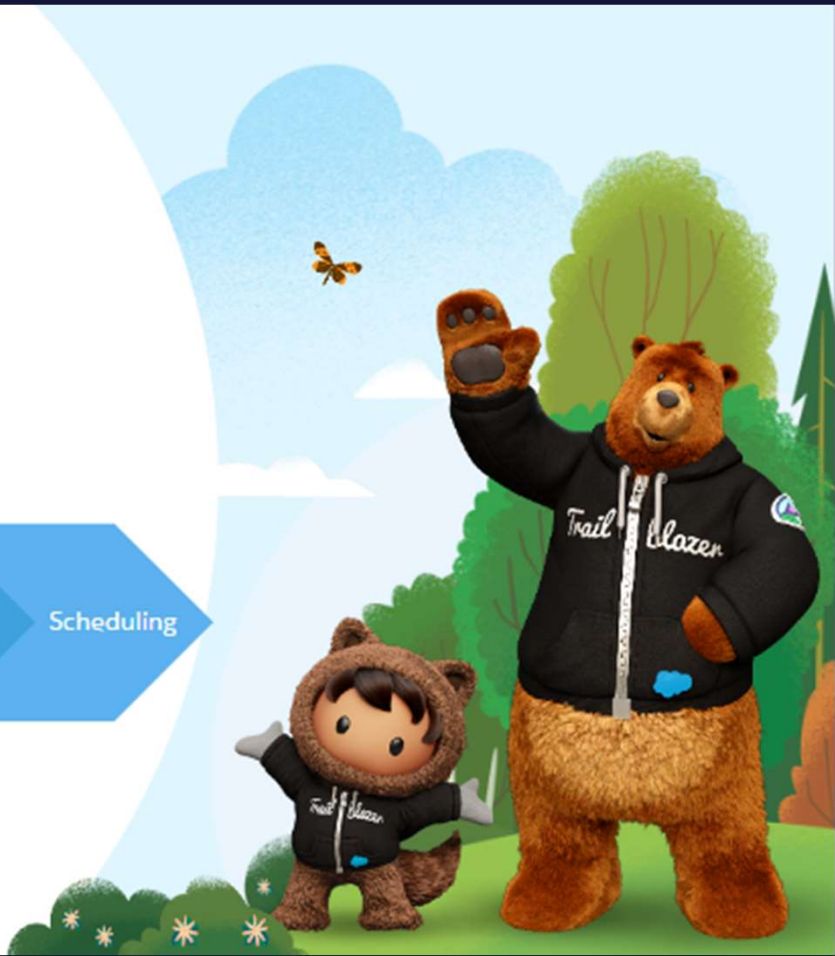
Filtered Lists

To prepare for her day, Sandra can leverage dynamic lists that are built based on sorting logic. This helps to ensure those who are the most at risk have immediate outreach.





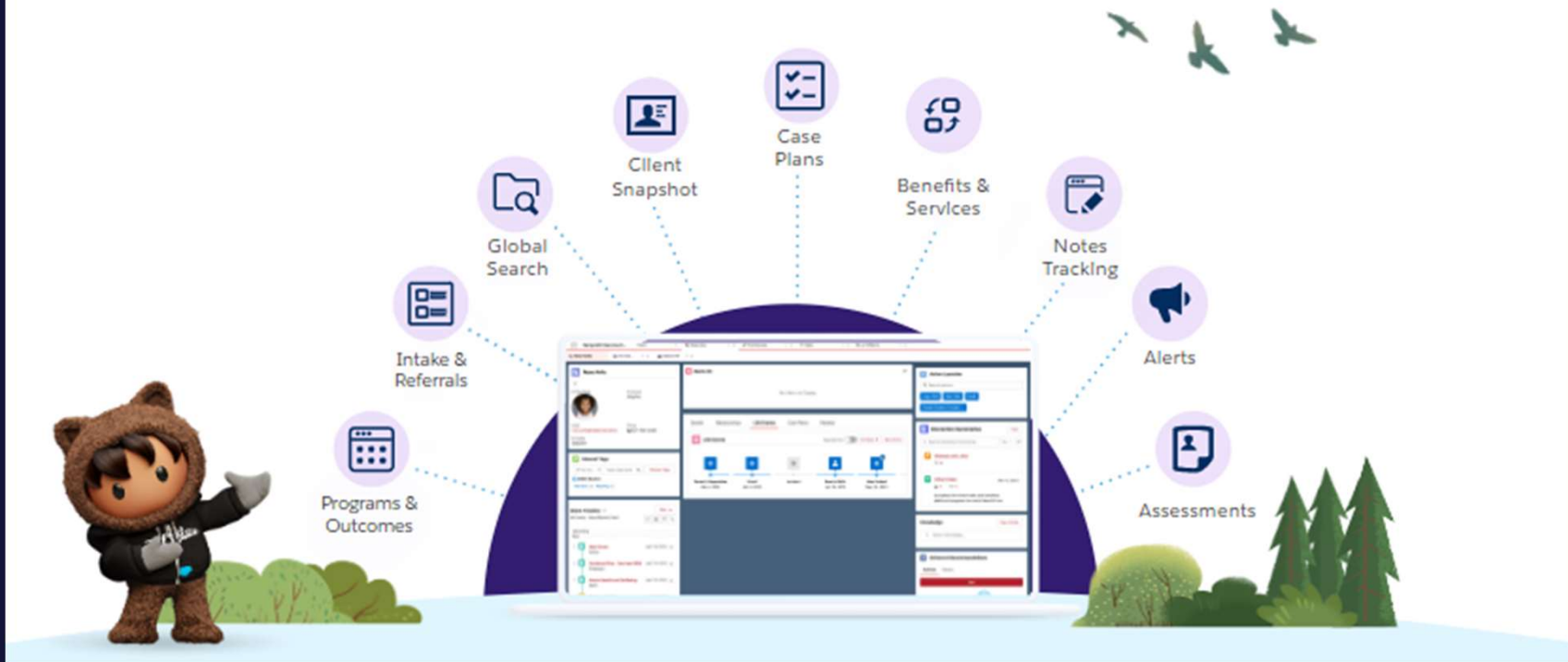
During Care



Nonprofit Cloud Case Management

Purpose-built for Service Providers

 salesforce.org



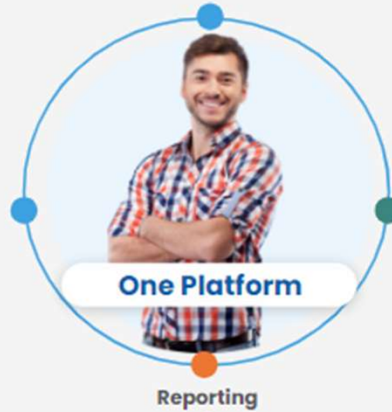
Case Management

for Whole Person Care
Support every stage of the service user journey





Referrals



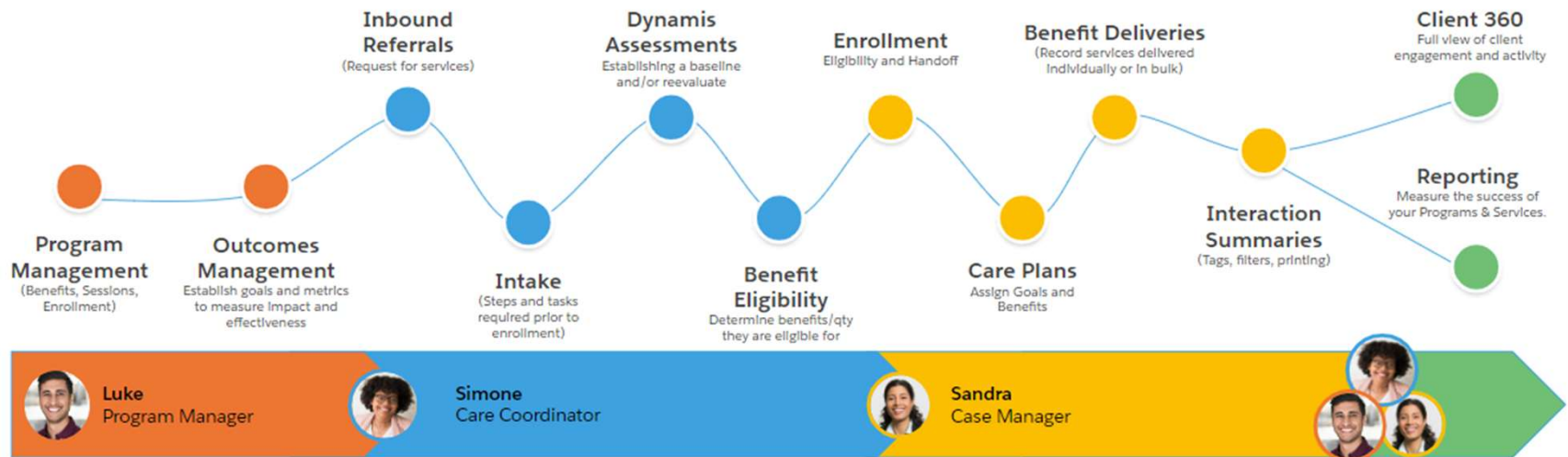
Stakeholder 360

for Household Care

Support everyone in a household



Benefit & Case Management

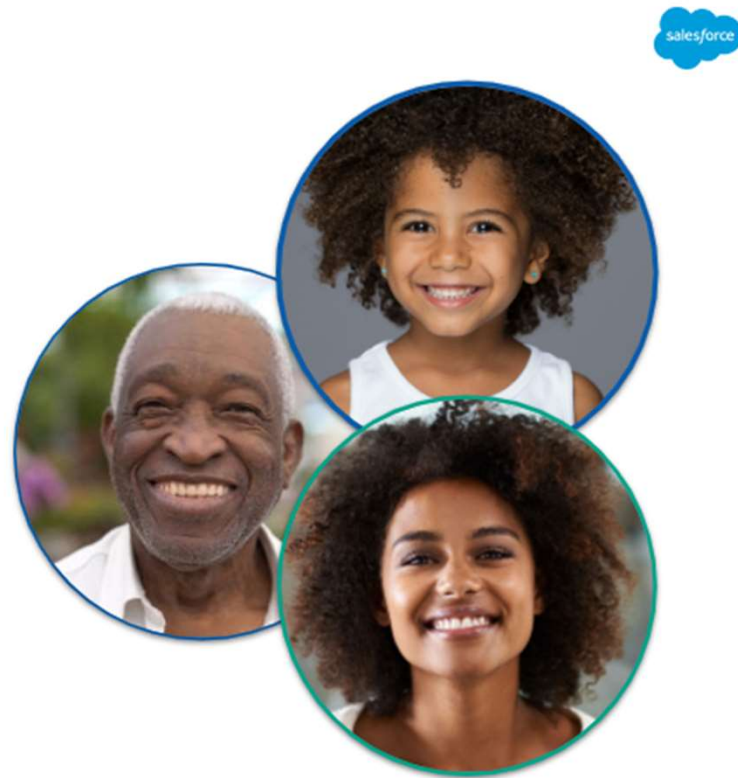


Williams Family

MEET Avila Family

Rose has been referred to STEPS . The goal is to make sure the referral is managed in a timely manner and Rose gets access to services quickly.

Rose is a minor and is currently under the primary care of her grandfather. While he will be responsible for her enrollment, her mother will be participating in some of the services she will receive.



MEET SANDRA

Sandra is a Case Manager at a fictitious organization named STEPS. Sandra's job is to work every day with a variety of clients, track their progress towards achieving their goals, and make sure none of them slip through the cracks.

Sandra has just been assigned a new client named Rose. Let's follow along as Sandra prepares for her first meeting with Rose.





Q Branch

Q Home

Demo Wizard

Demo Tools

Demo Component

Referrals



Actionable Lists

All Actionable Lists ▼



2 items • Sorted by Name • Filtered by All actionable lists • Updated an hour ago

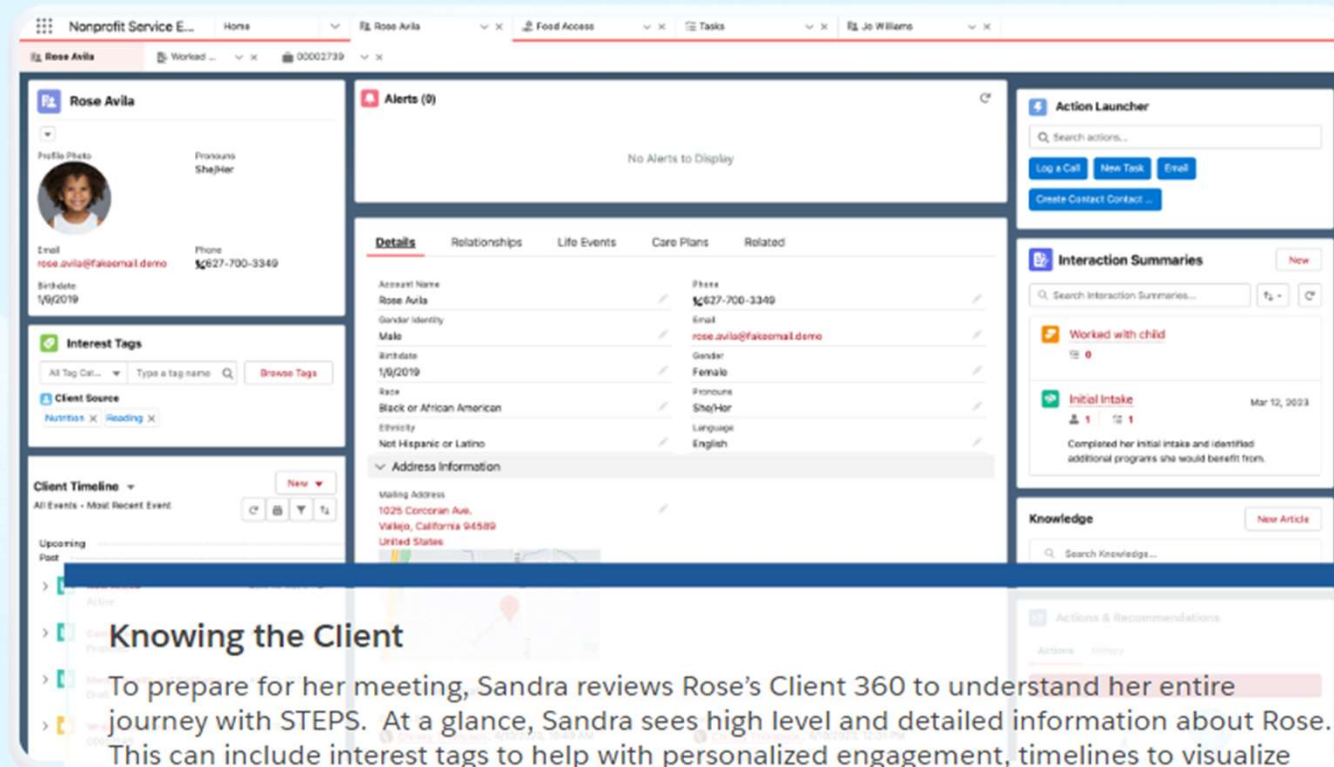
	<input type="checkbox"/> Name ↑	Object Name
1	<input type="checkbox"/> High Risk Referrals	Account
2	<input type="checkbox"/> My Referrals Assigned to Me	Account

Filtered Lists

To prepare for her day, Sandra can leverage dynamic lists that are built based on sorting logic. This helps to ensure those who are the most at risk have immediate outreach.



Client 360



Client 360

Alerts (0)
No Alerts to Display

Details	Relationships	Life Events	Care Plans	Related
Account Name Rose Avila	Phone 627-700-3349	Birthdate 1/8/2019	Gender Female	Language English
Gender Identity Male	Phone 627-700-3349	Birthdate 1/8/2019	Gender Female	Language English
Race Black or African American	Phone 627-700-3349	Birthdate 1/8/2019	Gender Female	Language English
Ethnicity Not Hispanic or Latino	Phone 627-700-3349	Birthdate 1/8/2019	Gender Female	Language English
Address Information				
Mailing Address 1025 Concoran Ave, Vallejo, California 94589 United States				

Interaction Summaries

- Worked with child
- Initial Intake (Mar 12, 2023)

Client Timeline

All Events - Most Recent Event

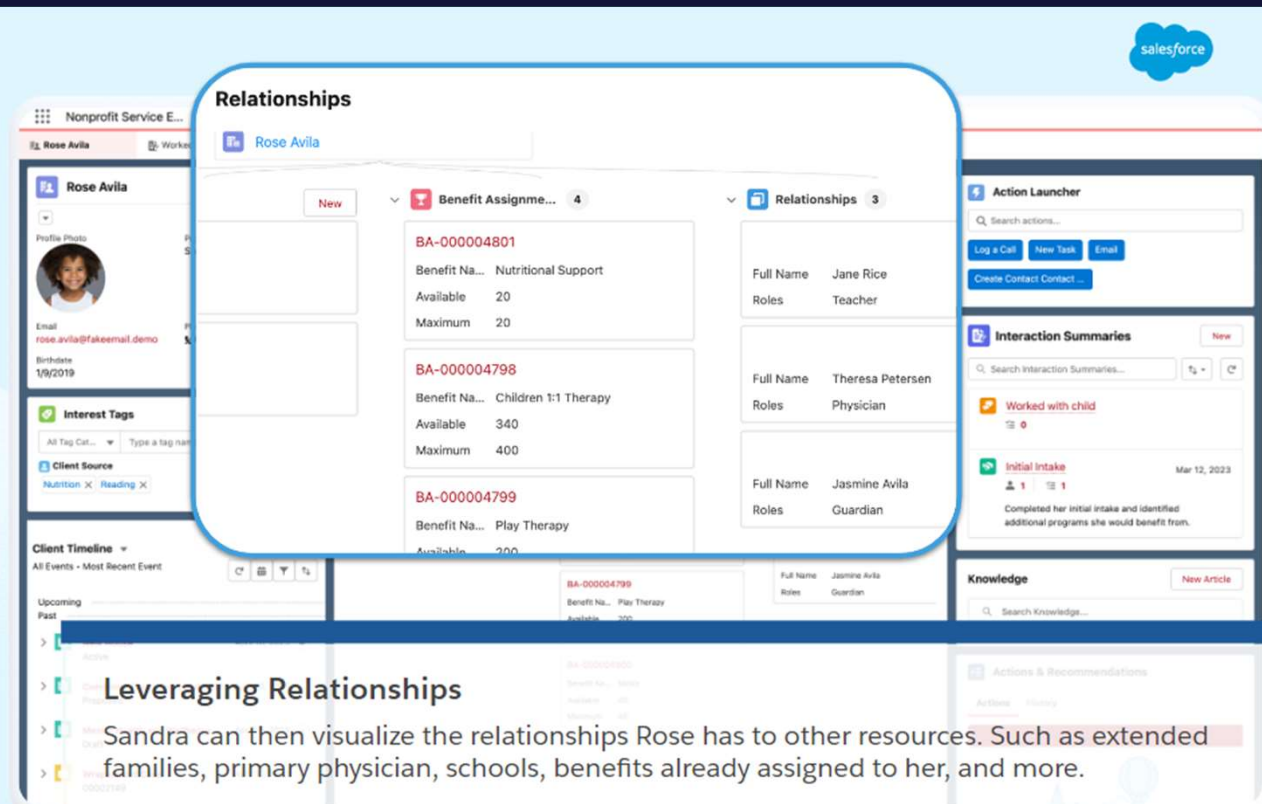
Upcoming Post

Knowing the Client

To prepare for her meeting, Sandra reviews Rose's Client 360 to understand her entire journey with STEPS. At a glance, Sandra sees high level and detailed information about Rose. This can include interest tags to help with personalized engagement, timelines to visualize and track the events that affect her outcomes, and quick snapshots of all her interactions with STEPS staff.



Case Manager Client Relationships



Relationships

Benefit Assignments (4)

Benefit ID	Benefit Name	Available	Maximum
BA-00004801	Nutritional Support	20	20
BA-00004798	Children 1:1 Therapy	340	400
BA-00004799	Play Therapy	200	

Relationships (3)

Full Name	Roles
Jane Rice	Teacher
Theresa Petersen	Physician
Jasmine Avila	Guardian

Client Profile: Rose Avila

- Email: rose.avila@fakeemail.demo
- Birthdate: 1/9/2019
- Interest Tags: Nutrition, Reading
- Client Source: Nutrition, Reading

Client Timeline

- Upcoming
- Past
- Active

Interaction Summaries

- Worked with child
- Initial Intake (Mar 12, 2023): Completed her initial intake and identified additional programs she would benefit from.

Knowledge

Actions & Recommendations

Leveraging Relationships

- Sandra can then visualize the relationships Rose has to other resources. Such as extended families, primary physician, schools, benefits already assigned to her, and more.

Sandra can not only easily visualize these relationships, but we can take action on them right from this screen





Sandra | Case Manager

Search programs, Participants, and more...



Rita
Referral Specialist



Recently Viewed

10 Items • Updated 8 minutes ago

Search this list...

Recently Viewed ↓

Connected

Mr. Michael McKinney
Sequel Industries • VP Sales

Enter extension...

Spoke with Michael and he informed me that her biological father was recently incarcerated. He took custody of her, but he physically knows that he won't be able to support her long term. He is very concerned about her future and is very interested in proceeding with our services.

Mr. Michael McKinney

[+ Follow](#) [Convert](#) [Edit](#)

Company
Sequel Industries

3) 555-2345

el@example.com

ince Last Activity

We found no potential duplicates of this Lead.

Submitted Rejected Conver

Status: [Mark Status](#)

Activity Chatter Details

[Log a Call](#) Email New Task New Event

Recap your call...

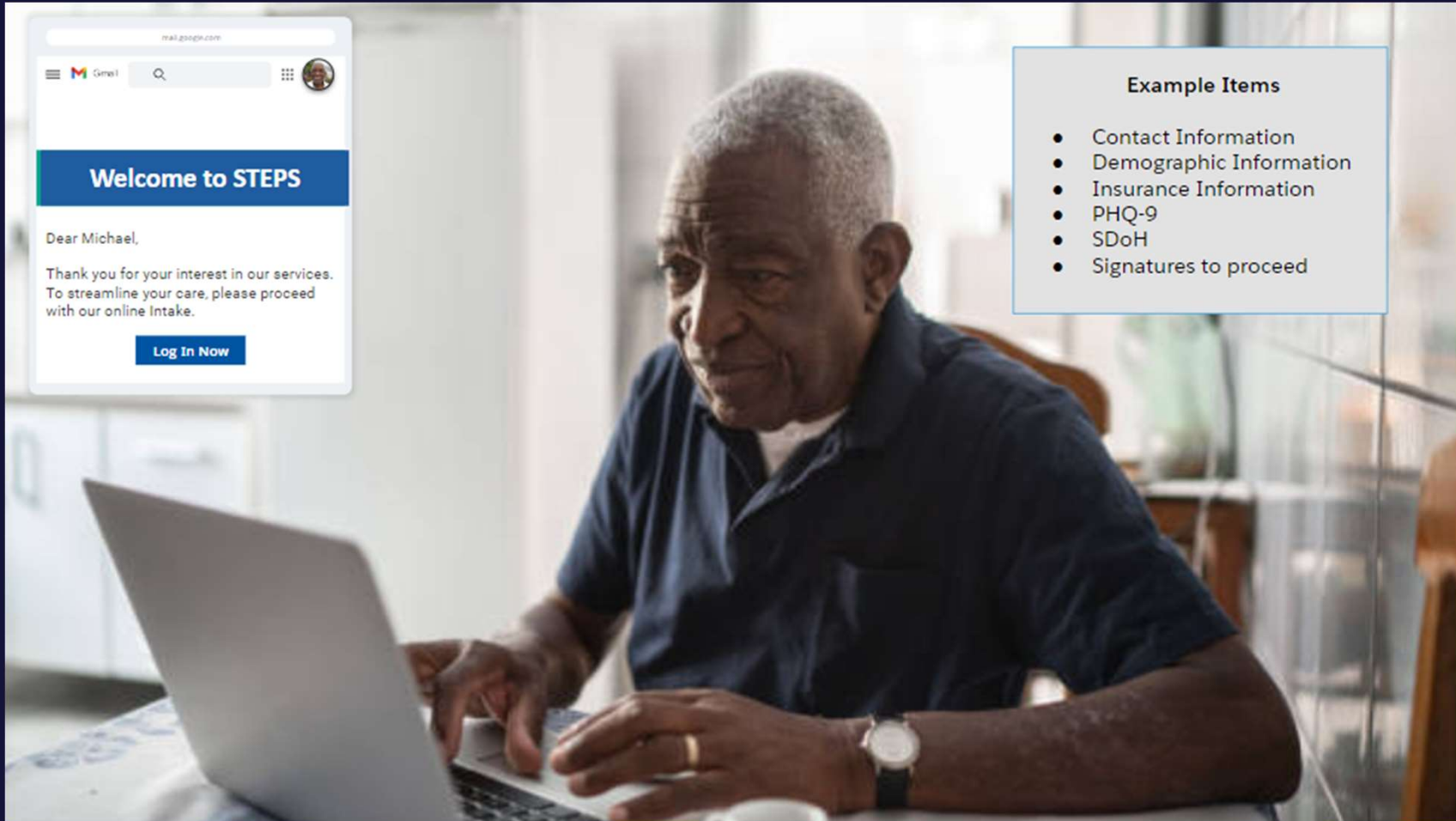
Filters: All time • All activities • A

[Refresh](#) • [Expand](#)

▼ **Upcoming & Overdue**

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

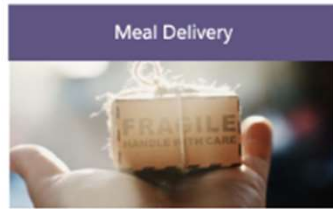


Example Items

- Contact Information
- Demographic Information
- Insurance Information
- PHQ-9
- SDoH
- Signatures to proceed



Heart Healthy



Meal Delivery



Stay Active

FAQs

About Support

Frequently asked questions about billing

How do I post to the community?

How do I update my profile?

Is my personal information secure?

What is your privacy policy?

Cases

My Applications

1 item • Sorted by Case Number • Filtered by All cases • Subject • Updated a few seconds ago

Search this list...

Case Number	Subject	Status	Priority	Channel	Indicator	Case Owner...
00001164	Rose: Application 2021	Working	High			b-service

Help Center

Learning Resources

Chat

Chat started at 8:11 PM

Hello Michael! I am the Uplift Chat Bot. I can help you navigate your questions. How can I help?

H

Heka

Schedule

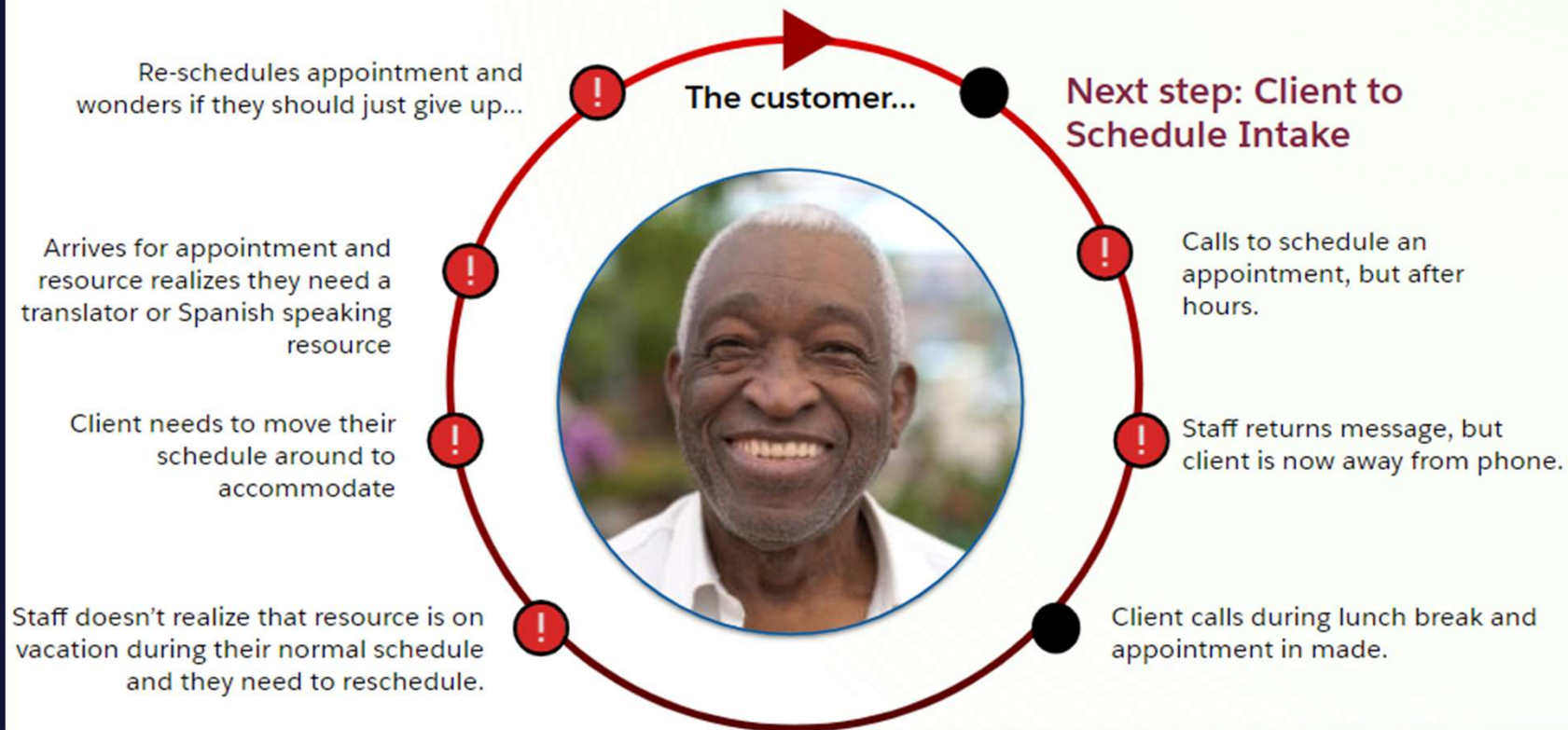
Review Case Plan

Portal Help

Type your message...



Before Salesforce Scheduler...



The screenshot displays a Salesforce interface with a 'Schedule Appointment' modal window open. The modal is titled 'Select Appointment Location' and prompts the user to 'Select the location for your appointment'. It features a search bar with 'San Francisco, CA, USA' entered and a 'Within 10 miles' filter. Two location options are listed:

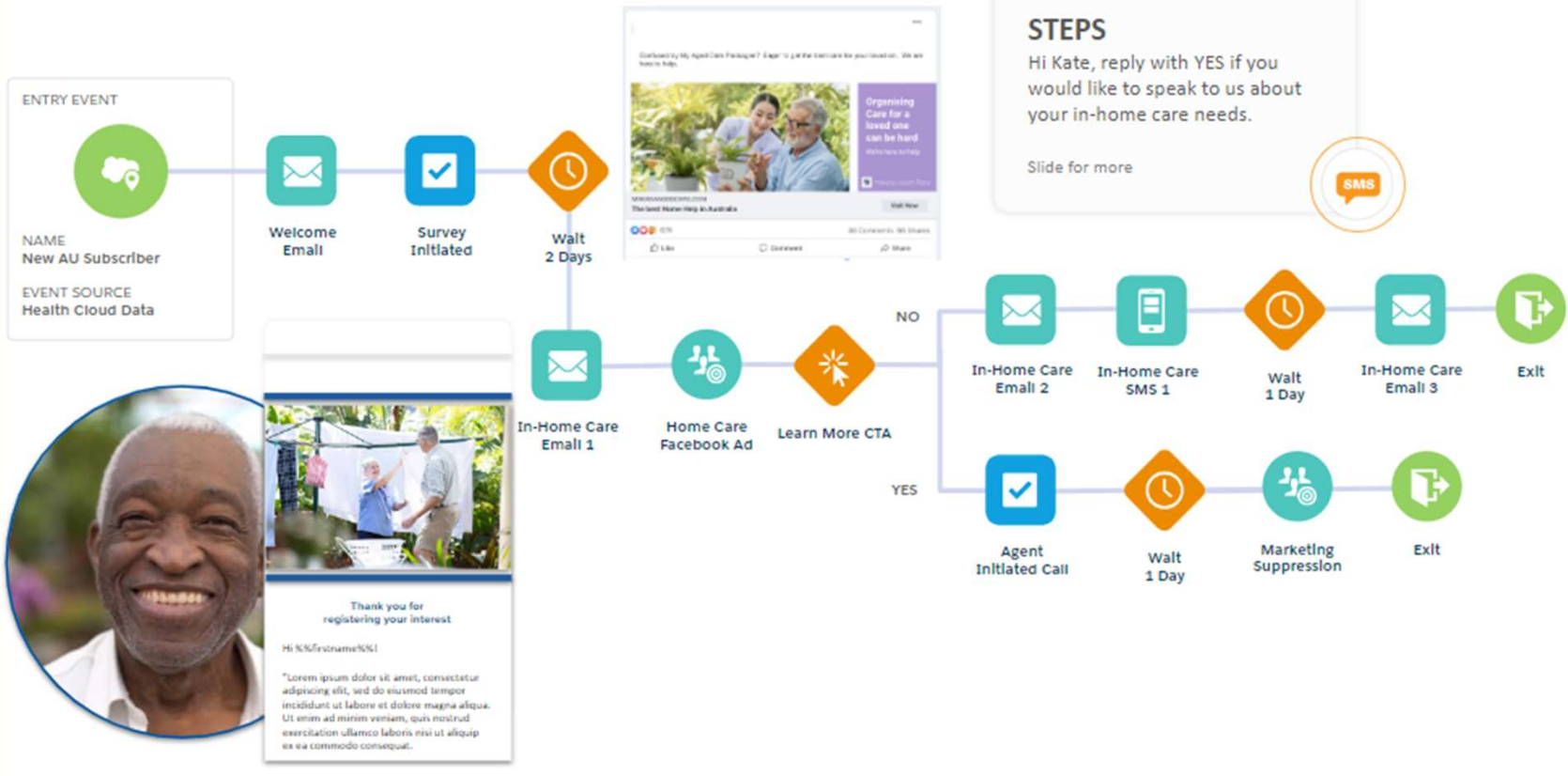
- 1.87 mi**: 1 Market St Branch, San Francisco. Hours: Monday 8AM - 5PM, Tuesday 8AM - 5PM, Wednesday 8AM - 5PM, Thursday 8AM - 5PM, Friday 8AM - 5PM, Saturday 9AM - 2PM.
- 7.74 mi**: 8 Captain Dr Branch, Emeryville. Hours: Monday 8AM - 5PM, Tuesday 8AM - 5PM, Wednesday 8AM - 5PM, Thursday 8AM - 5PM, Friday 8AM - 5PM, Saturday 9AM - 2PM.

Navigation buttons for 'Previous' and 'Next' are visible at the bottom of the modal. In the background, a lead profile for 'Mrs. Rachel Adams' is visible. To the right, a 'Chat' window is open, showing a conversation:

- System: Chat started at 8:11 PM
- Agent: Appointment booked! Anything else we can help you with?
- User: No. Thanks.
- Agent: We will see you Monday, the 22nd at 10am.

The chat window includes a 'Type your message...' input field and a 'Help Center' and 'Learning Resources' sidebar.

New Client Acquisition Journey



Several days later...

Case Manager Life Events

The screenshot shows a Salesforce CRM interface for a client named Rose Avila. The 'Life Events' section displays a timeline of events:

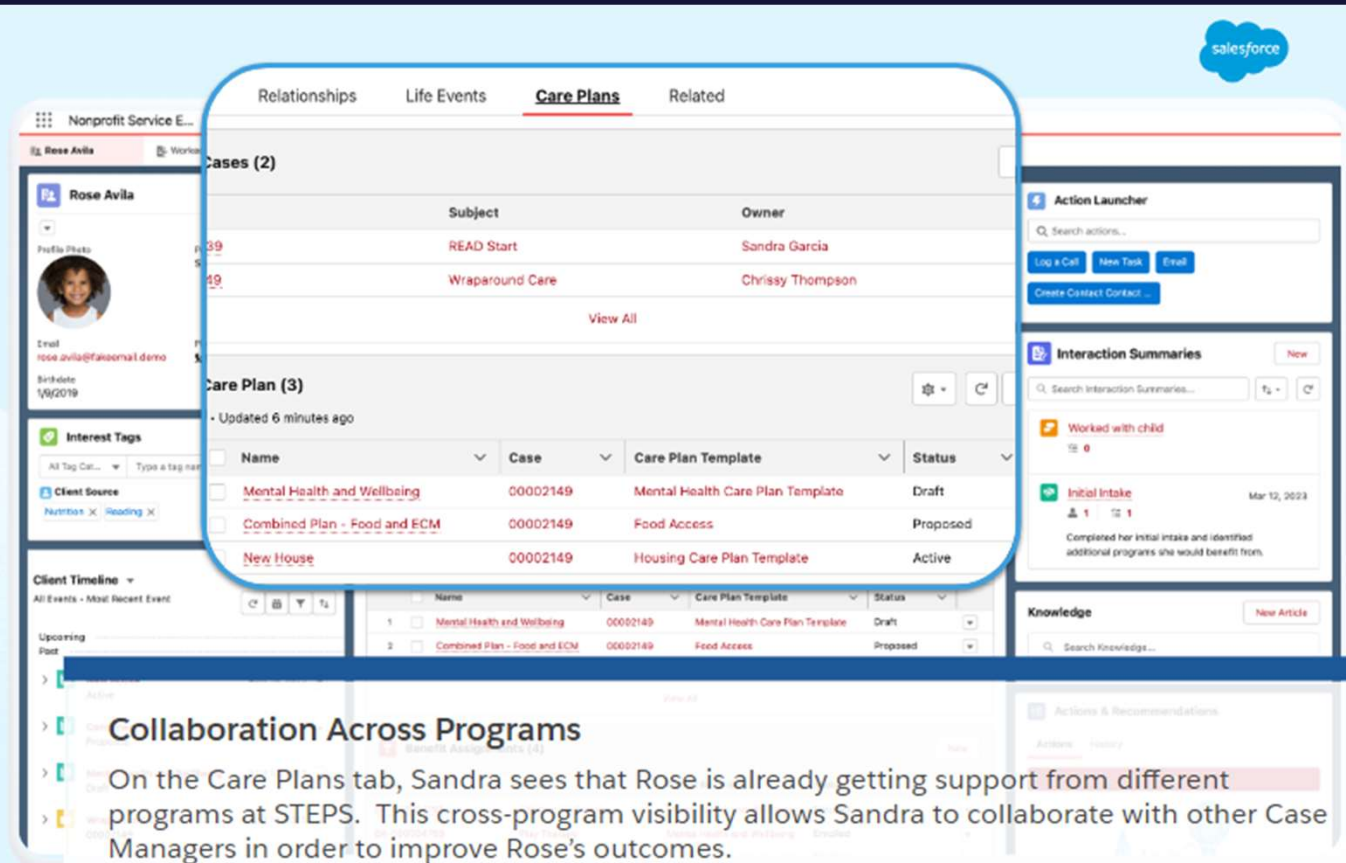
- Parent's Separation: Mar 4, 2022 (Grey icon)
- Covid: Apr 3, 2023 (Light blue icon)
- Incident: (Grey icon)
- Rose's Birth: Jun 10, 2019 (Light blue icon)
- New School: May 22, 2023 (Light blue icon)

A text box overlaid on the screenshot explains: "Life Events as Milestones for Outcomes. Sandra reviews the life events for Rose, which are major milestones that are important for her organization to track. As each of these milestones happen, they will light up. Any grey life events are milestones Rose has not achieved yet, and could be a signal to Sandra's team that the client might benefit from a referral to another program."

Life Events as Milestones for Outcomes

Sandra reviews the life events for Rose, which are major milestones that are important for her organization to track. As each of these milestones happen, they will light up. Any grey life events are milestones Rose has not achieved yet, and could be a signal to Sandra's team that the client might benefit from a referral to another program.

Case Manager Care Coordination



The screenshot displays the Salesforce interface for a Case Manager. The main content area is titled "Care Plans" and shows a list of care plans for a client named Rose Avila. The table below summarizes the care plans:

Name	Case	Care Plan Template	Status
Mental Health and Wellbeing	00002149	Mental Health Care Plan Template	Draft
Combined Plan - Food and ECM	00002149	Food Access	Proposed
New House	00002149	Housing Care Plan Template	Active

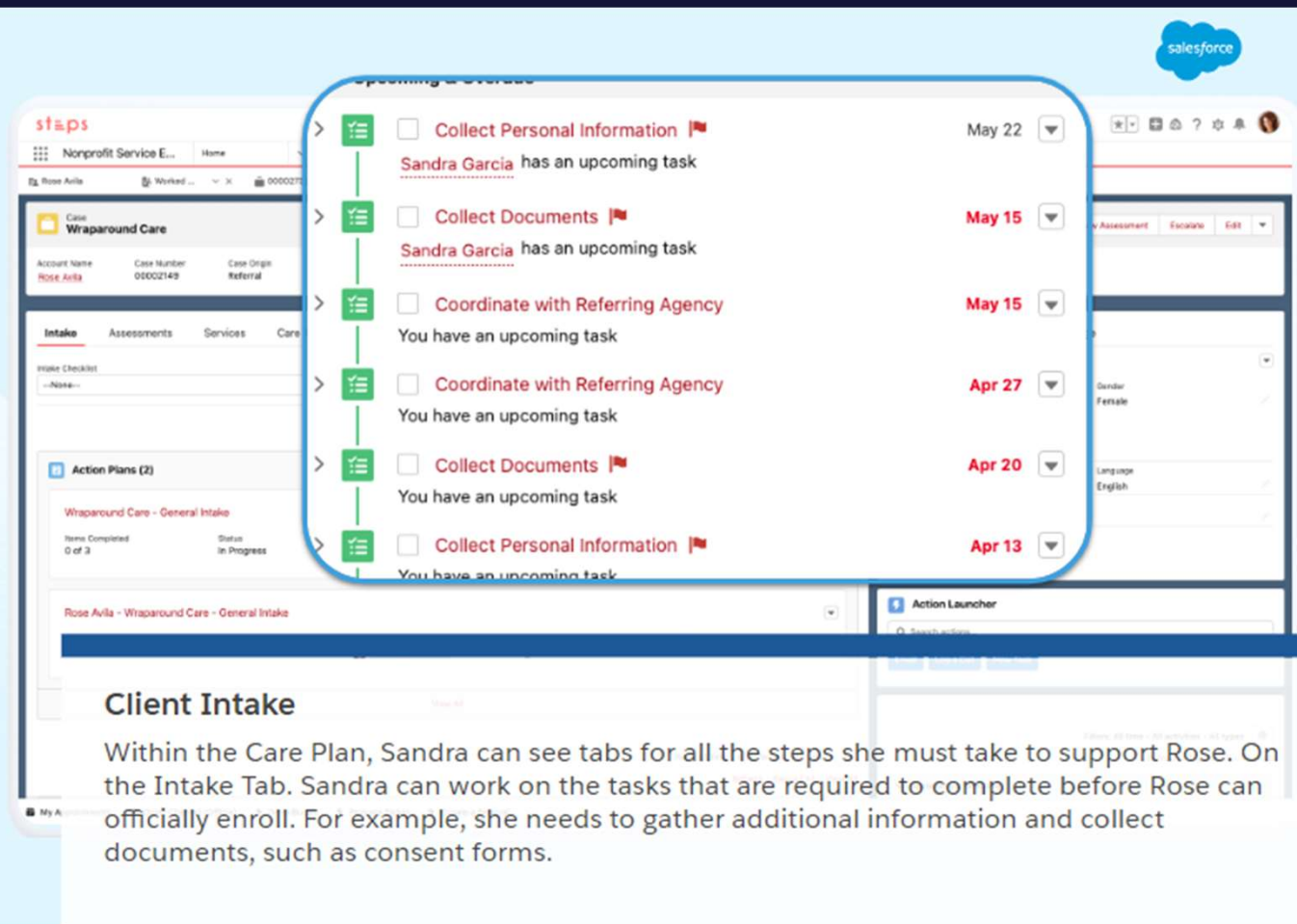
The right-hand panel shows an "Action Launcher" with buttons for "Log a Call", "New Task", and "Email", and a "Create Contact Contact..." button. Below it is an "Interaction Summaries" section with a search bar and a list of interactions, including "Worked with child" and "Initial Intake" (dated Mar 12, 2023). At the bottom, there is a "Knowledge" section with a search bar and an "Actions & Recommendations" section.

Collaboration Across Programs

On the Care Plans tab, Sandra sees that Rose is already getting support from different programs at STEPS. This cross-program visibility allows Sandra to collaborate with other Case Managers in order to improve Rose's outcomes.



Case Manager Intake



The screenshot displays a Salesforce interface for a Case Manager. The main content area shows a case for "Rose Avila" under "Wraparound Care". The "Intake" tab is active, showing a checklist and action plans. A central task list is highlighted, listing the following tasks and their due dates:

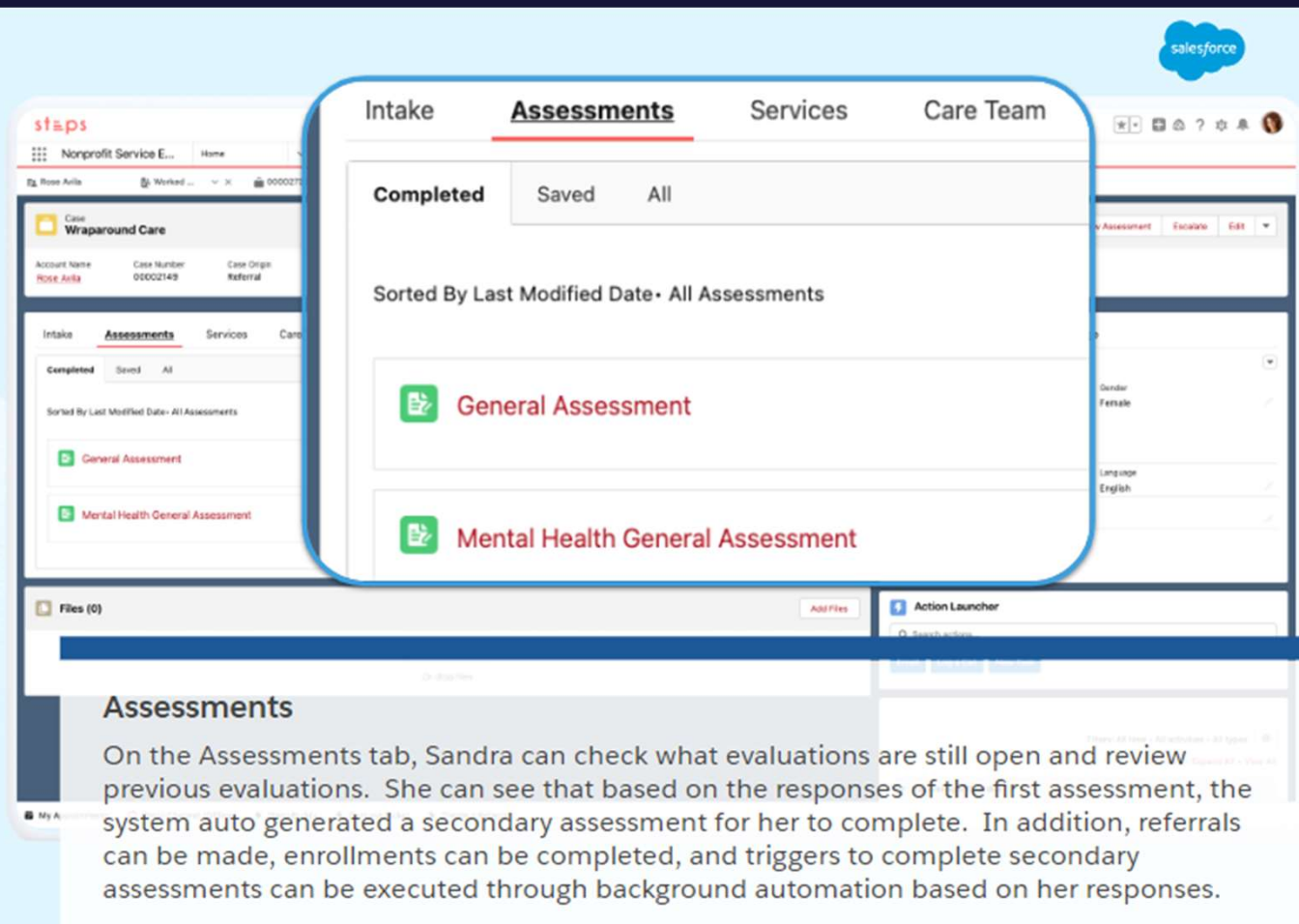
- Collect Personal Information (May 22)
- Collect Documents (May 15)
- Coordinate with Referring Agency (May 15)
- Coordinate with Referring Agency (Apr 27)
- Collect Documents (Apr 20)
- Collect Personal Information (Apr 13)

Each task is accompanied by a green checklist icon and a notification that "Sandra Garcia has an upcoming task" or "You have an upcoming task".

Client Intake

Within the Care Plan, Sandra can see tabs for all the steps she must take to support Rose. On the Intake Tab, Sandra can work on the tasks that are required to complete before Rose can officially enroll. For example, she needs to gather additional information and collect documents, such as consent forms.

Case Manager Assessments

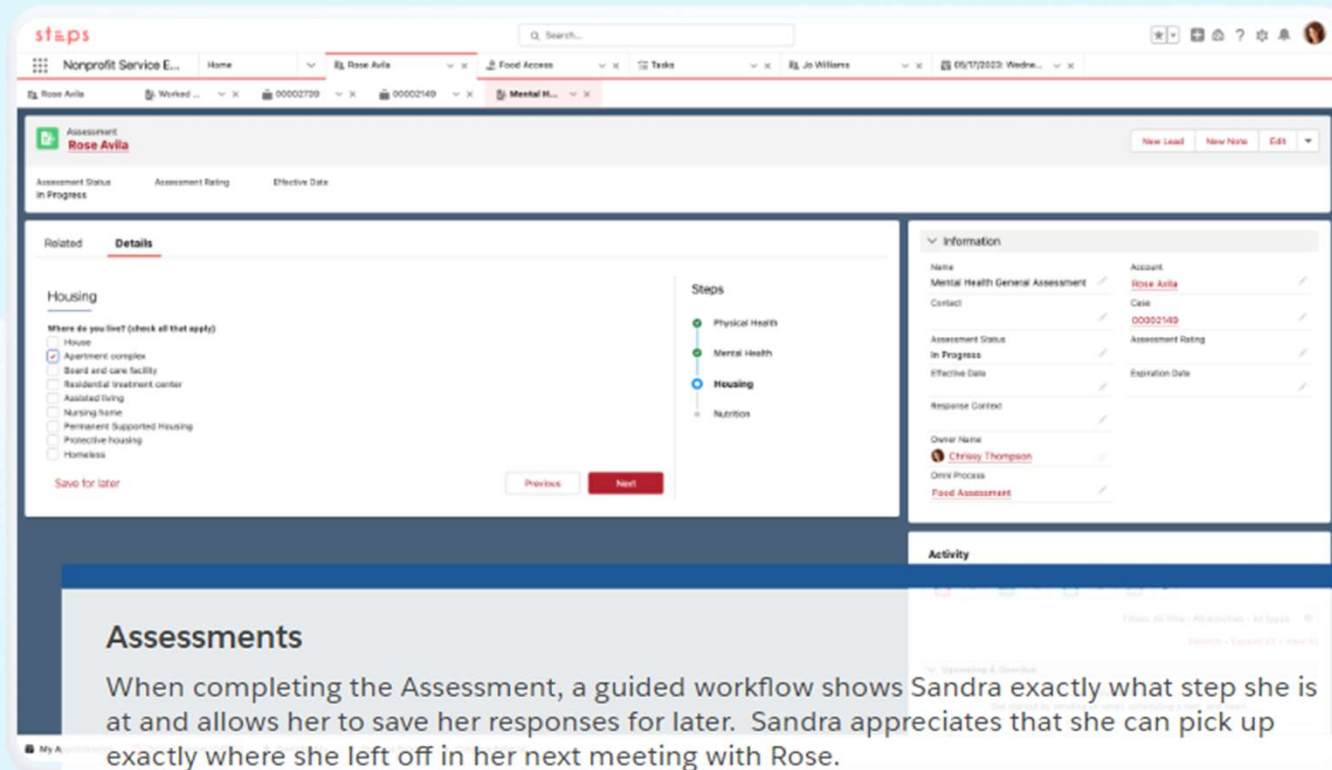


The screenshot displays the 'steps' software interface. At the top, there is a navigation bar with tabs for 'Intake', 'Assessments', 'Services', and 'Care Team'. The 'Assessments' tab is currently selected. Below the navigation bar, there are filter options: 'Completed', 'Saved', and 'All'. The main content area shows a list of assessments, sorted by 'Last Modified Date'. Two assessments are visible: 'General Assessment' and 'Mental Health General Assessment'. The interface also includes a 'Files (0)' section and an 'Action Launcher'.

Assessments

On the Assessments tab, Sandra can check what evaluations are still open and review previous evaluations. She can see that based on the responses of the first assessment, the system auto generated a secondary assessment for her to complete. In addition, referrals can be made, enrollments can be completed, and triggers to complete secondary assessments can be executed through background automation based on her responses.

Case Manager Assessments



The screenshot displays the 'steps' assessment tool interface. At the top, the user is logged in as 'Chris Thompson' and is viewing the assessment for 'Rose Avila'. The main content area is divided into three sections:

- Housing:** A checklist titled 'Where do you live? (check all that apply)'. The options are:
 - House
 - Apartment complex
 - Board and care facility
 - Residential treatment center
 - Assisted living
 - Nursing home
 - Permanent Supported Housing
 - Protective housing
 - Homeless
- Steps:** A vertical progress indicator showing four steps: Physical Health, Mental Health, **Housing** (current step), and Nutrition.
- Information:** A table of fields with their current values:

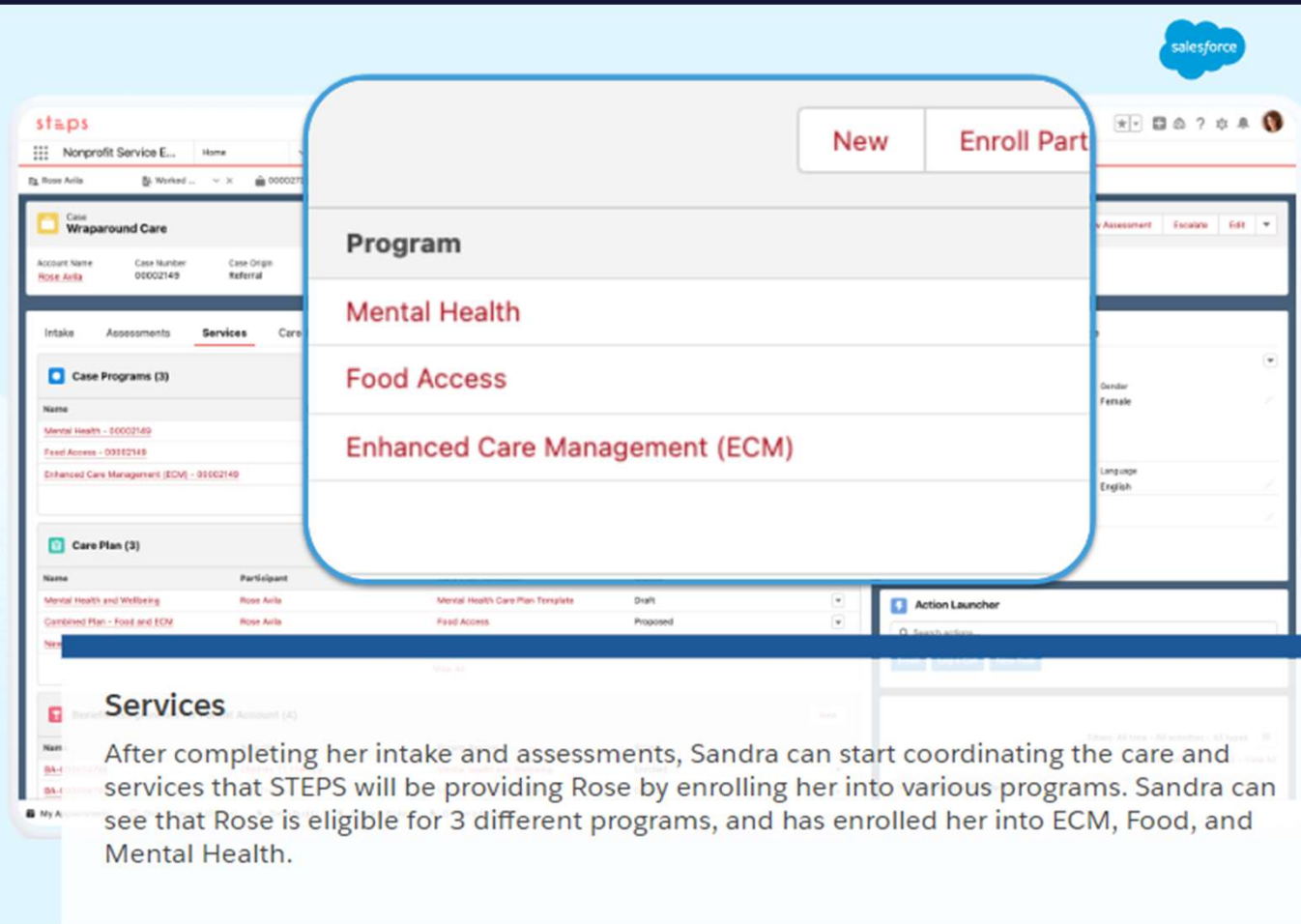
Field	Value
Name	Mental Health General Assessment
Account	Rose Avila
Contact	00002149
Assessment Status	In Progress
Effective Date	
Expiration Date	
Response Context	
Owner Name	Chris Thompson
Only Process	Food Assessment

At the bottom of the interface, there is an 'Activity' section and a 'Save for later' button. The overall layout is clean and user-friendly, designed to guide the case manager through the assessment process.

Assessments

When completing the Assessment, a guided workflow shows Sandra exactly what step she is at and allows her to save her responses for later. Sandra appreciates that she can pick up exactly where she left off in her next meeting with Rose.

Case Manager Care Programs



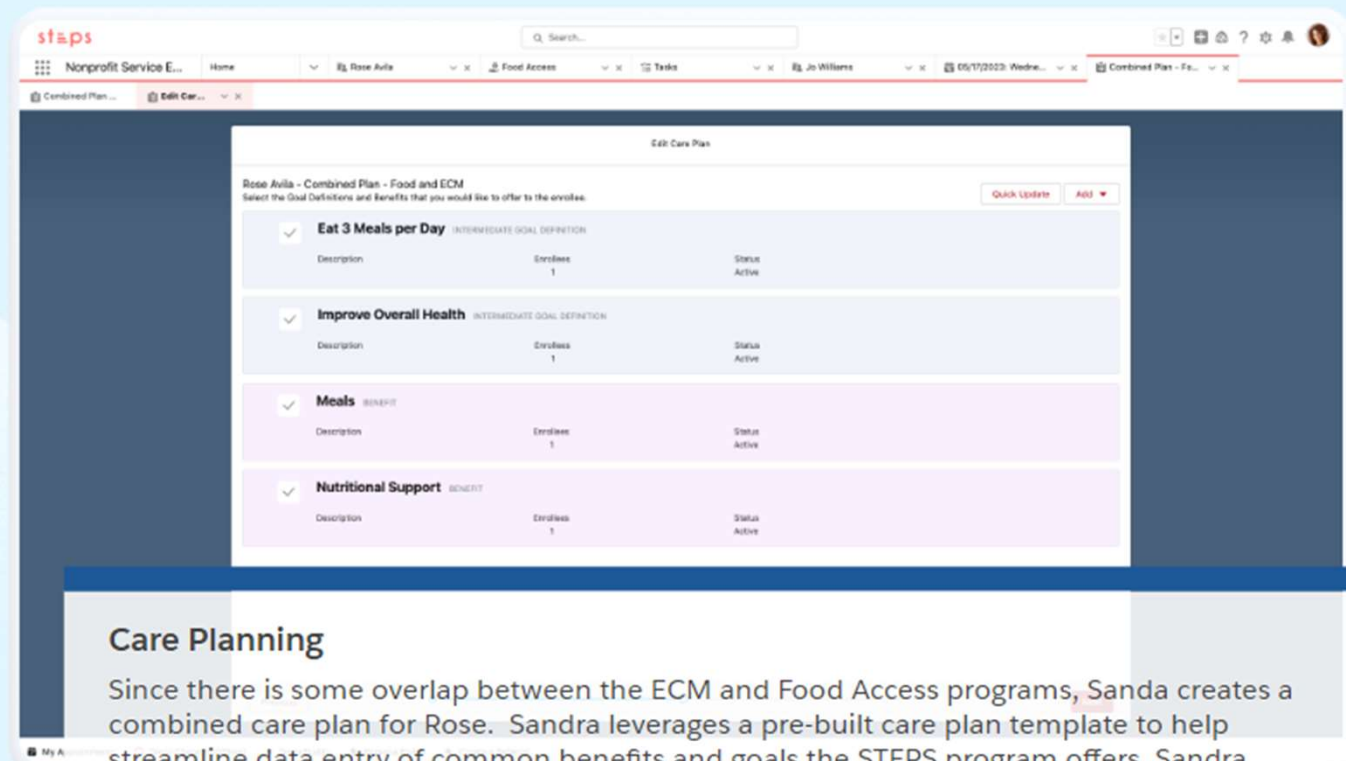
The screenshot shows the STEPS Salesforce interface for a case manager. The case is for Rose Ariza, with account name 'Rose Ariza', case number '00002149', and case origin 'Referral'. The interface is divided into sections: 'Case Programs (3)' and 'Care Plan (3)'. A callout box highlights the following programs:

- Program
- Mental Health
- Food Access
- Enhanced Care Management (ECM)

Services

After completing her intake and assessments, Sandra can start coordinating the care and services that STEPS will be providing Rose by enrolling her into various programs. Sandra can see that Rose is eligible for 3 different programs, and has enrolled her into ECM, Food, and Mental Health.

Case Manager Care Plans



steps Nonprofit Service E... Home Rose Avila Food Access Tasks Jo Williams 05/17/2023 Wedne... Combined Plan - Fe...

Combined Plan - Fe... Edit Car...

Edit Care Plan

Rose Avila - Combined Plan - Food and ECM
Select the Goal Definitions and Benefits that you would like to offer to the enrollee. [Quick Update](#) [Add](#)

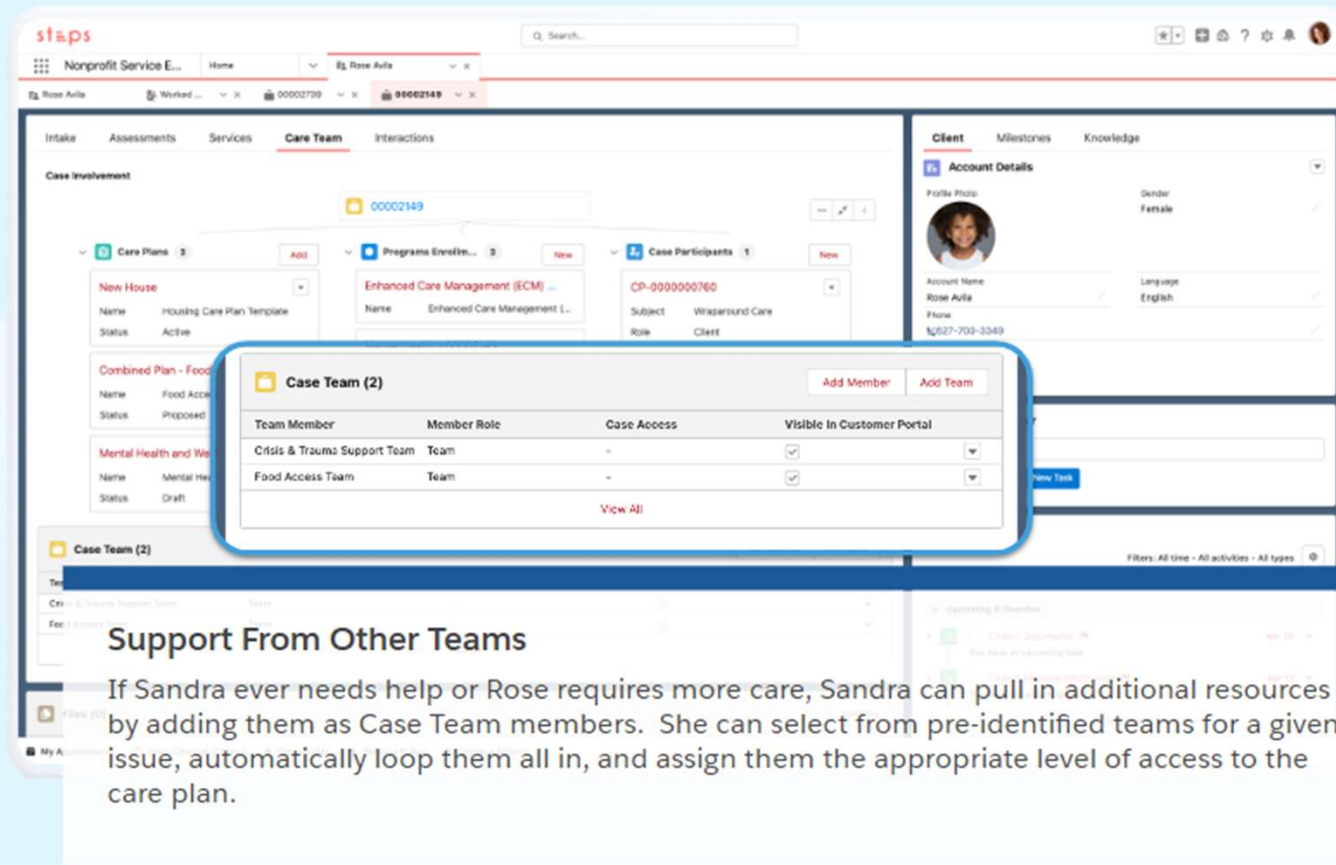
Goal/Benefit	Type	Description	Enrollee	Status
<input checked="" type="checkbox"/> Eat 3 Meals per Day	INTERMEDIATE GOAL DEFINITION		1	Active
<input checked="" type="checkbox"/> Improve Overall Health	INTERMEDIATE GOAL DEFINITION		1	Active
<input checked="" type="checkbox"/> Meals	BENEFIT		1	Active
<input checked="" type="checkbox"/> Nutritional Support	BENEFIT		1	Active

Care Planning

Since there is some overlap between the ECM and Food Access programs, Sandra creates a combined care plan for Rose. Sandra leverages a pre-built care plan template to help streamline data entry of common benefits and goals the STEPS program offers. Sandra appreciates that she doesn't need to type out the same goals for every client, she just selects the ones she needs.



Case Manager Case Teams



Case Team (2) Add Member Add Team

Team Member	Member Role	Case Access	Visible In Customer Portal
Crisis & Trauma Support Team	Team	-	<input checked="" type="checkbox"/>
Food Access Team	Team	-	<input checked="" type="checkbox"/>

[View All](#)

Support From Other Teams

If Sandra ever needs help or Rose requires more care, Sandra can pull in additional resources by adding them as Case Team members. She can select from pre-identified teams for a given issue, automatically loop them all in, and assign them the appropriate level of access to the care plan.

Case Manager Analytics

The screenshot displays a Salesforce dashboard for Case Management. The dashboard includes several key components:

- Dashboard Header:** "Case Management" with a refresh and subscribe button. It notes the data was last refreshed 2 days ago.
- Today's Referrals:** A table listing referrals with columns for Name, Client Name, Referral Program Name, Self Ref., and Referrer Org.

Name	Client Name	Referral Program Name	Self Ref.	Referrer Org
REF-000000001	Jo Williams	Food Access	<input type="checkbox"/>	Women's Center
REF-000000002	Bonnie Santos	Housing	<input checked="" type="checkbox"/>	-
REF-000000007	Bonnie Blackwell	Crisis & Trauma Support	<input type="checkbox"/>	-
REF-000000008	Rose Avila	Early Steps to School Success	<input type="checkbox"/>	Pediatrician Office
REF-000000009	Rose Avila	-	<input type="checkbox"/>	San Antonio Regional
- Program Enrollments:** A bar chart showing enrollment counts across various programs, categorized by status (Applied, Visited, In Progress, Completed, Withdrawn).
- Benefits Dispersed by Month:** A stacked bar chart showing the sum of disbursed quantity for different completion dates.
- Under Utilized:** A bar chart showing the number of referrals less than 3 disbursements, categorized by actual completion date.
- Overages:** A large red number '1' indicating a count of overages.
- Recently Viewed (2):** Profiles for Rose Avila and Jo Williams, including their profile photos, pronouns, email addresses, phone numbers, and birthdates.
- Inbound Referrals to Review:** A section for reviewing inbound referrals, currently showing 0 items.

Comprehensive Analytics and Reporting

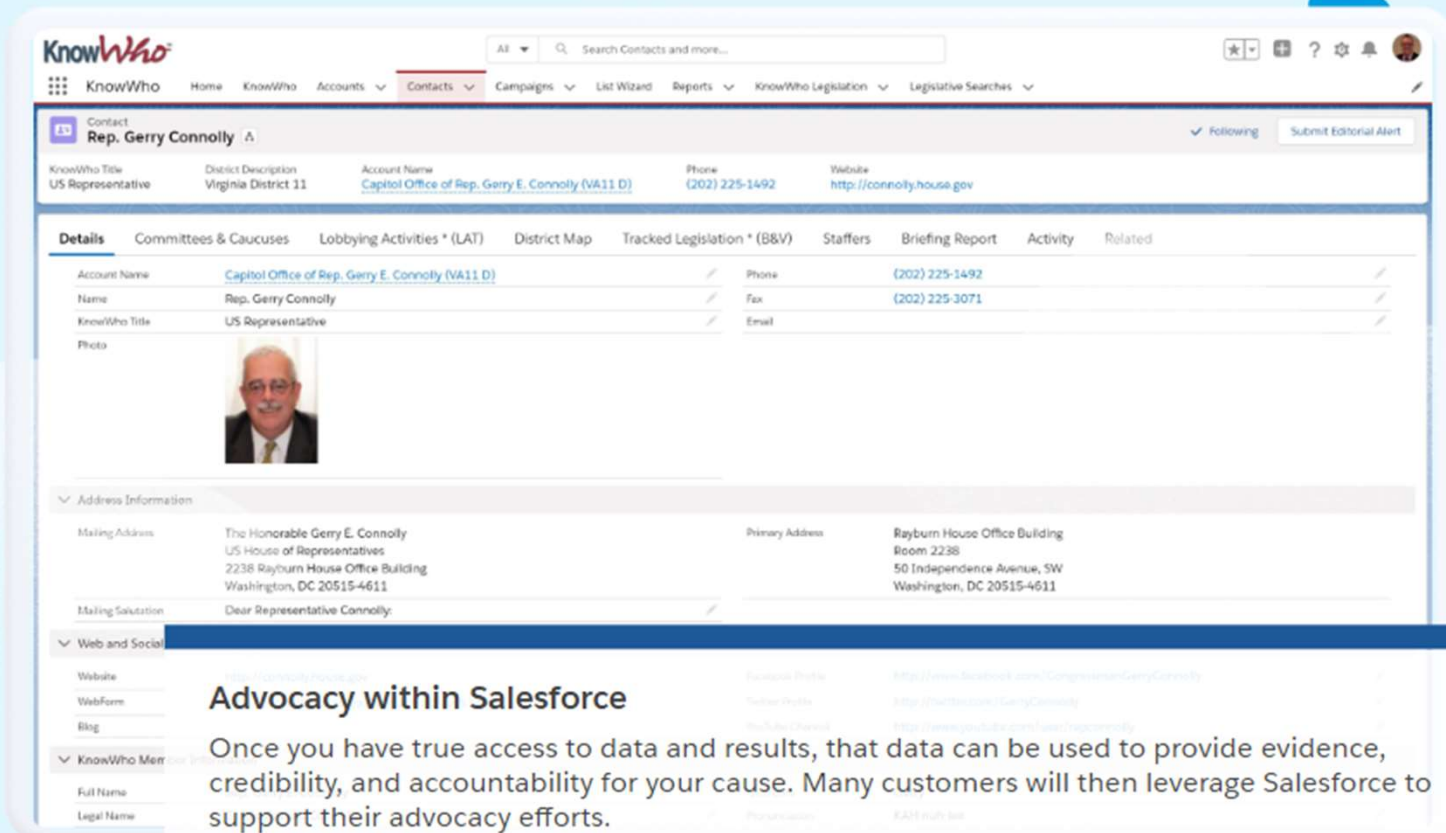
As Sandra provides services for Rose and her other clients, she is able to see her impact on her Case Manager Dashboard. This dashboard rolls up data in a way that helps case managers at STEPS visually understand what is happening across their programs and clients.



Post Care



Advocacy




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Name	Rep. Gerry Connolly	Fax	(202) 225-3071
KnowWho Title	US Representative	Email	

Photo: 

Address Information

Mailing Address	The Honorable Gerry E. Connolly US House of Representatives 2238 Rayburn House Office Building Washington, DC 20515-4611	Primary Address	Rayburn House Office Building Room 2238 50 Independence Avenue, SW Washington, DC 20515-4611
Mailing Salutation	Dear Representative Connolly:		

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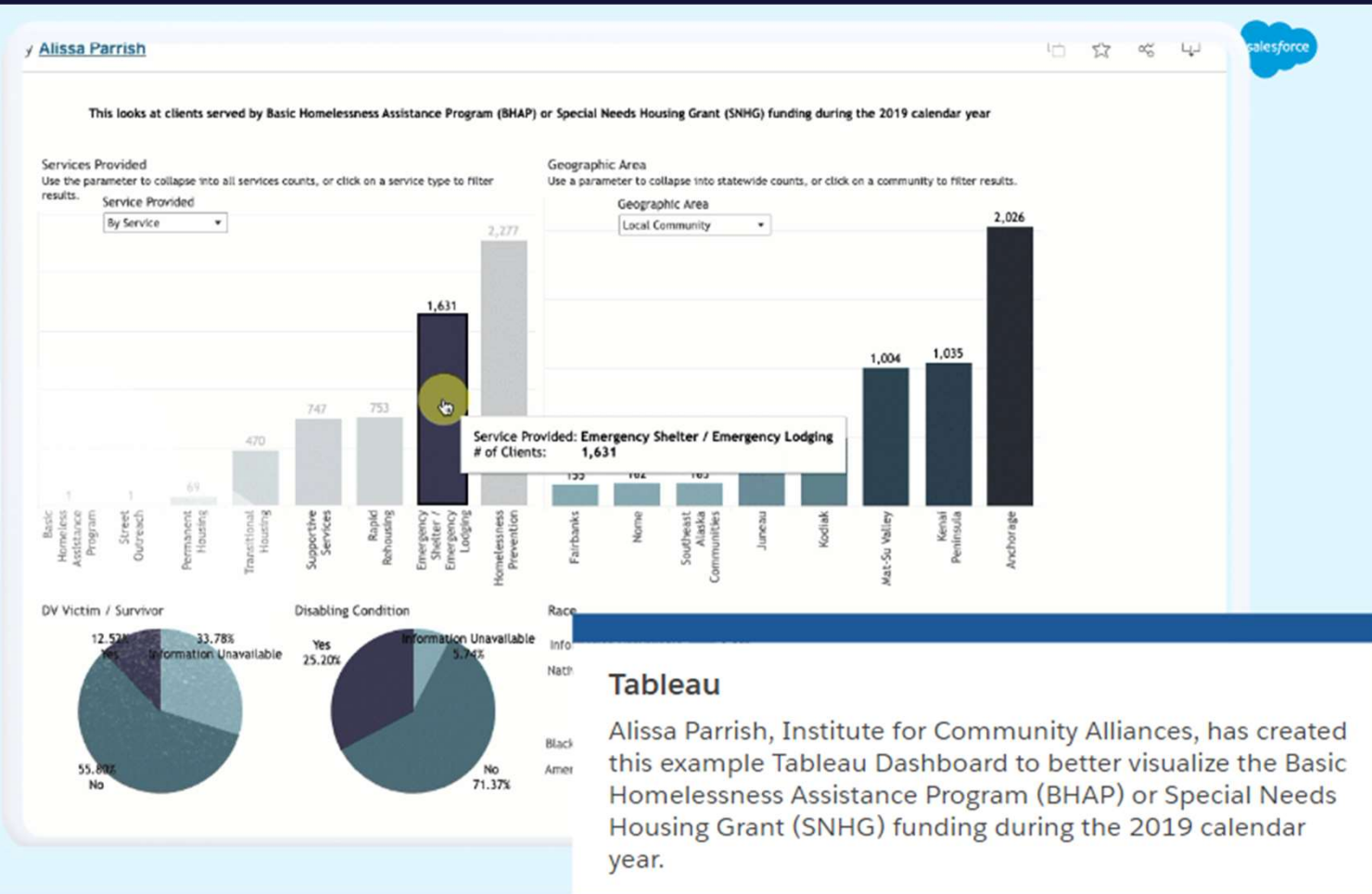
Full Name		Organization	K&A11 multi-ten
Legal Name			

Advocacy within Salesforce

Once you have true access to data and results, that data can be used to provide evidence, credibility, and accountability for your cause. Many customers will then leverage Salesforce to support their advocacy efforts.



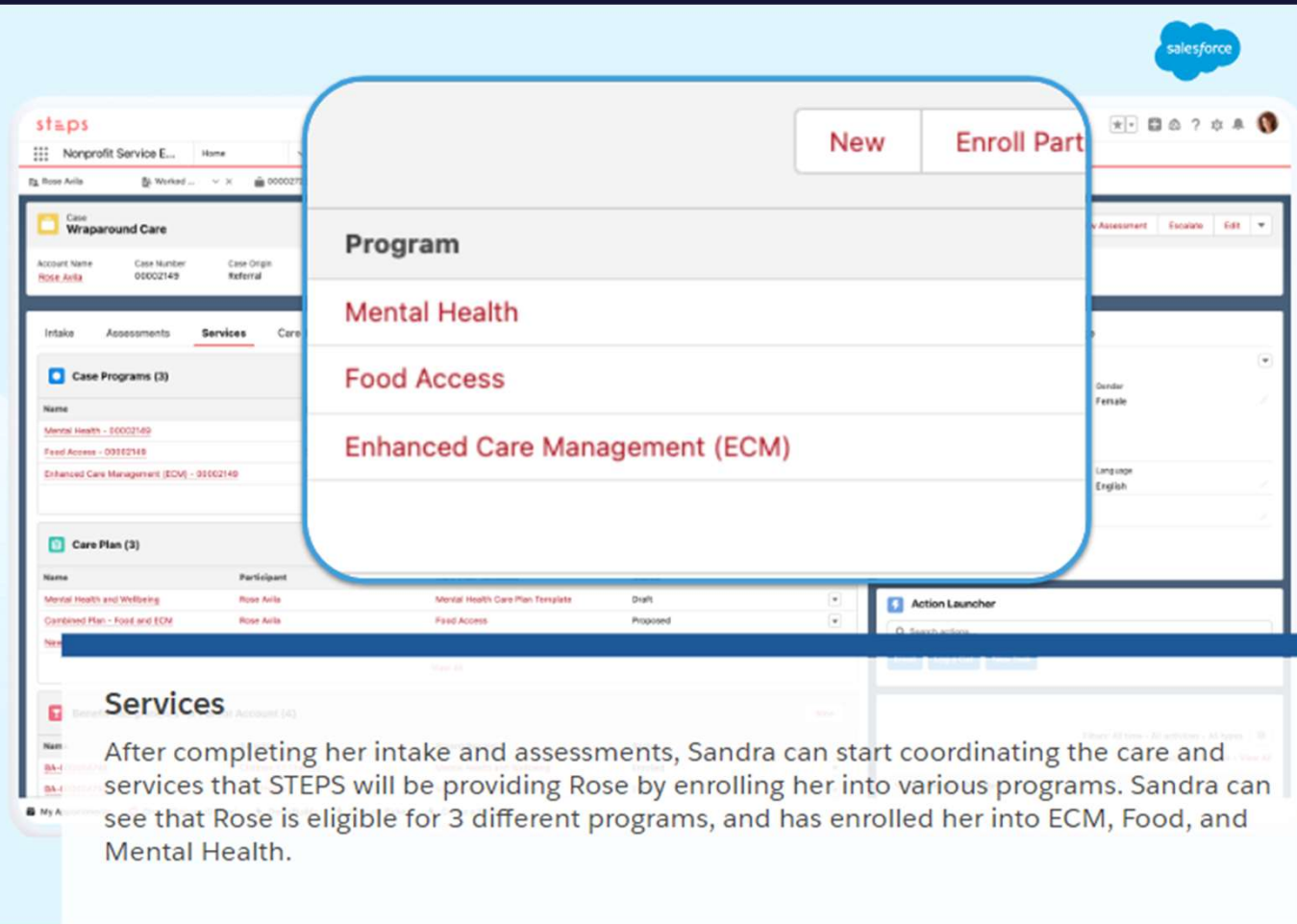
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Tableau

Alissa Parrish, Institute for Community Alliances, has created this example Tableau Dashboard to better visualize the Basic Homelessness Assistance Program (BHAP) or Special Needs Housing Grant (SNHG) funding during the 2019 calendar year.

Cross Program Enrollments



The screenshot displays the STEPS Salesforce interface for a case titled "Wraparound Care". The case details include Account Name "Rose Aris", Case Number "00002149", and Case Origin "Referral". The "Services" tab is active, showing a list of "Case Programs (3)":

- Mental Health - 00002149
- Food Access - 00002149
- Enhanced Care Management (ECM) - 00002149

Below the list, a table shows the "Care Plan (3)" details:

Name	Participant	Template	Status
Mental Health and Wellbeing	Rose Aris	Mental Health Care Plan Template	Draft
Combined Plan - Food and ECM	Rose Aris	Food Access	Proposed

An "Action Launcher" is visible at the bottom right of the interface.

Services

After completing her intake and assessments, Sandra can start coordinating the care and services that STEPS will be providing Rose by enrolling her into various programs. Sandra can see that Rose is eligible for 3 different programs, and has enrolled her into ECM, Food, and Mental Health.

