AGENDA

- ABOUT O'NEILL/TECHBRIDGE
- WHAT IS CLIENT JOURNEY MAPPING?
- CLIENT JOURNEY MAPPING: ONE ORGANIZATION
- COLLECTIVE CLIENT JOURNEY MAPPING

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ABOUT THE WILLIAM J. AND DOROTHY K. O'NEILL FOUNDATION

MISSION:

To partner with nonprofits to IMPROVE THE QUALITY OF LIFE for families and communities in places where O'Neill family members live.

VISION:

To build STRONG COMMUNITIES where FAMILIES THRIVE.

ABOUT THE FOUNDATION'S 2-GEN WORK

Uses a "whole-family approach" to meet the needs of the entire family unit

STRATEGIC GOALS
Making high impact grants; actively engaging family members in the work of the Foundation; ensuring sustained commitment in future generations; and good stewardship

GRANTMAKING
Planning/demonstration and deep impact grants in the areas of health and well-being, educational success and homelessness
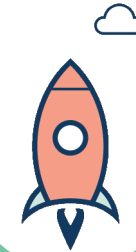
GEOGRAPHY
Grants span across 8 US communities including Washington D.C., Florida, Hawaii, New York City, Maryland, Ohio, Texas and Vermont

ABOUT TECHBRIDGE

Today's Speakers

Karen Cramer

TechBridge

VP, Community Impact

Linda Min

TechBridge

Senior Director of Consulting

OUR MISSION

TechBridge uses technology to break the cycle of generational poverty
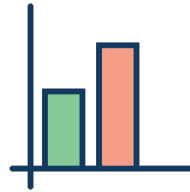
WE DELIVER TECHNOLOGY

To Nonprofits and Communities

TO POWER THE DATA

For Collaboration and Insight

TO OVERCOME POVERTY

Through Collective Action

TECHBRIDGE'S VISION FOR
POVERTY ALLEVIATION THROUGH COLLECTIVE ACTION

A transformed US community ecosystem able
to measurably reduce poverty through:

DATA
Collecting more meaningful data with better accuracy by improving capacity for front-line nonprofits and service providers

INSIGHT
Aggregating community data; analyzing causation, trends and efficacy; and sharing insights with service providers, advocates and residents.

RESOURCES
Allocating goods, services and funding more efficiently and timely to the programs effective in reducing resident poverty.

NATIONAL: TECHBRIDGE SECTORS

MOVING RESIDENTS OUT OF POVERTY REQUIRES COMMUNITY COORDINATION

SURVIVAL

Coordination of neighborhood shelters, food pantries, clinics and emergency assistance providers to ensure at-risk children receive life-saving resources.

37% National Nonprofits Served By TechBridge

STABILITY

Foster stable environments for local children by mapping needs and threats to mentorship, justice, and extracurricular programs.

60% National Nonprofits Served By TechBridge

SUCCESS

Build high-value skills, successful behaviors, and financial acumen.
Secure employment with leading firms for middle-class jobs.

3% National Nonprofits Served By TechBridge

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WHAT IS CLIENT JOURNEY MAPPING?

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WHAT IS A CLIENT JOURNEY MAP?

- At its core, it is a business process map (also referred to as a flowchart) centered around the experience (or "journey") of a nonprofit's client from their first interaction of outreach, to intake and service delivery, and all the way through program exit and reporting on long-term outcomes.
- Client journey maps can also be used for partnerships and service coordination ecosystems

CLIENT JOURNEY MAPPING FROM A 2 GEN PERSPECTIVE

Two Gen Guided Principles:

- **Measure and account for outcomes for both children and their parents**
  - Think about the questions you are asking when you first engage with a prospective client, are you asking about both children and parents?
- **Engage and listen to the voices of families**
  - Are they participating in program and service design?
  - Are you facilitating focus groups?
  - Are you incorporating participant feedback?
- **Ensure equity: evaluate and fix structural problems**
  - What is it like for clients to navigate your agency?
  - Your partnership/collaborative?
  - Are there wrong doors?
- **Align and link systems and funding streams**
  - We will learn about this when we talk about collective client journey mapping
  - What systems does your partnership or collaborative encounter in your work?

CLIENT JOURNEY MAPPING AT ONE ORGANIZATION

CLIENT JOURNEY MAPPING AT ONE ORGANIZATION

| Outreach | Assessment | Intake | Service Planning | Service Delivery | Aftercare Planning | Case Closure |

The process of how a community resident interacts with your organization from outreach to case closure

- How do you distinguish prospective clients from clients?
- How you know which programs and services your client is enrolled in?
- How you know what stage of the process your client is in?
- Helps case workers know what to do in a typical case
- This helps your organization to get ready for a database that works for your workflows
- Mapping these processes allows for process improvement

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HOW CAN WE MAKE THIS PROCESS MORE EFFICIENT AND EFFECTIVE?

- What are the pain points in our processes? For our organization? For our clients? For our prospective clients?
- How do we break down program and department silos?
- Have we centralized intake?
- Are we considering the whole family?
- Do we ask questions about services we don't provide?
- Who should be involved in this process?
- How do we test processes?

Example of Intake: Transitional Housing Program

4A. Residential Application Screening & Enrollment

Pre Qualified potential resident in application queue → **Case Manager** assigns intern or case manager to complete application screening → **Intern/Case Manager** conducts application screening by phone → **Pass Application Screening?**

- **Yes** → **Schedule Residential Interview** before call ends and add to Salesforce calendar → Send resident **residential interview** email template with directions to interview, family questionnaire, and list of required documents → Potential Resident completes family questionnaire → **Residential interview** held with both case managers → **Required documentation scanned and uploaded** to potential resident profile

- **No** → **Complete** Capture reason and email referral resources

Required documentation scanned and uploaded → Biosocial Assessment administered and results logged to potential resident profile → Potential resident read **program statement** → Potential resident signs **sample rules and guideline** → **2 weeks** given to determine **program acceptance** → **Accepted to program?**

- **No** → Case Manager sends form letter with reason for rejection → **Complete** Capture reason and email referral resources

- **Yes** → **Client Status** Enrolled → Capture client apartment # → **Resident** care team assigned in system (Facilities Director, Child Education Directors, Case Managers) → **Call Resident** to inform of program acceptance and **schedule move-in date** → Resident arrives for **move in day** → **Children 5-18** Resident completes **5A. ASP Enrollment Process** → **Children <5** Resident completes **3A. ECDC Enrollment Process** (Resident) → **Tour** campus and new apartment → Review program covenant → **E-Sign** required documents from Dept. Community Affairs → **Meet with Care Team** (Facilities Director, Child Education Directors, Case Managers) → Capture case notes and service hours from meetings with Care Team → **Schedule** kickoff meeting with case manager and add to Salesforce calendar → **Move in** to unit → Continue to **4B. Residential Service Delivery, Case Management, and Aftercare Planning**

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Example of Early Childhood Development Center Assessments and Service Delivery

Daily Programming

Resident/Non-Resident child arrives for ECDC → Teacher has prepared daily lesson plan based on GELDS curriculum, creative curriculum, and workbooks from The School Box → Child completes daily scheduling & activities → Teacher logs daily attendance into client management system → Parent/Guardian picks child up at end of day

Parent Activities

Parent attends orientation meeting Aug. 3rd → Parent/Guardian engages in parental involvement activities → Teacher logs parent/guardian attendance into client management system

Admin. Functions

ECDC Director collects monthly program fee based on rate card

Assessment

Child progress assessed in March and September → Teacher assists child with E-Child SGI Letters Alive Online → Teacher assists child with Literacy Assessment → Assessment summary scores are logged into client management system

Child of Resident?

Child Remains Enrolled in ECDC? — Yes / No

Case Management

Children with behavioral health issues referred to service partner → Child case manager tracks external referrals → Child case manager tracks case notes external referrals → Return to 4B. Residential Service Delivery

Mark Child contact records as inactive → Capture date and reason for program exit → Complete

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COLLECTIVE CLIENT JOURNEY MAPPING

CLIENT JOURNEY MAPPING COLLECTIVELY

Outreach	Assessment	Eligibility Criteria	Sending Referrals	Receiving Referrals	Service Provision	Outcome Measurement	Data Sharing and Reporting	Service Coordination

- Outreach
- Assessing clients
- Inventorying what services each organization provides
- Determining eligibility criteria
- Sending referrals
- Making referrals
- Determining and matching supply and demand
- Service Provision
- Data sharing
- Reporting
- Service Coordination

Together we will make a Better NASHVILLE

United Way
United Way of Metropolitan Nashville

FAMILY EMPOWERMENT PROGRAM
MOVING FAMILIES OUT OF HOMELESSNESS

TechBridge®
Business smart. Community focused.

Expanded Coaching (Phase I Future State)

Eligibility criteria confirmed for family enrolled in services at ELC/FRC

Service Enrollment — Family Coach/Engagement Specialist

Previously served?

- **Yes** → Navigate to existing household record → From "Status Update" complete re-enrollment to ensure household enrollment & contact information is up to date
- **No** → Create new FEP Household → Create new Expanded Coaching Enrollment

→ Assign Care Team → Scan/upload signed consent forms → Complete family income and employment updates → Complete intake status updates form → Complete initial Expanded Coaching Outcomes Assessment → Complete session logs after every family meeting w/ case not and dosage → Maintain client-related information → Update event attendance from household or events page → Complete expanded coaching outcomes assessment and status updates form at 6-month follow ups through program exit → Complete Client Satisfaction Survey at Program Exit → **Complete**

**Phase I Benefit:
Client Satisfaction Surveys can be sent from HOME**

Career Development — Employment Navigator

Assign Employment Navigator

Receive email alert of new client → Review income and employment details → Set employment goals → Monitor progress on employment goals → Connect to potential employers and update employment information → **Complete**

Financial Literacy — Financial Counselor

Client signs release of information → Review income and employment details → Manually enter client contact and household information → Complete Financial Health Assessment → Track client credit, debt, banking and savings → Track financial goals → **Complete**

**Phase I Benefit:
(Optional) Integrate FEC Salesforce data to CTA Home for comprehensive reporting on housing and financial information**

Legend:
- United Way Salesforce
- HOME
- FEC Salesforce

Housing Program (Ph. 1 Future State)

Service Enrollment — Case Manager

Family arrives at Safe Haven / Catholic Charities

Previously served?
- Yes → Navigate to existing household record → From "Status Update" complete re-enrollment → Assign Care Team
- No → Create new FEP Household → Create new Housing Enrollment → Assign Care Team

Phase I Benefit: HMIS data will sync automatically through CTA Home app.

Assign Care Team → Complete HMIS Records → Add family income → Conduct initial F-SPDAT Housing assessment → Maintain client-related information → Conduct 6-month follow ups & Exit Interview → Complete

Housing Assistance — Housing Specialist

Assign Housing Specialist

Receive email alert of new client → Review household and enrollment details to identify housing barriers → Help client with necessary housing interventions → Monitor housing stability and be available for crisis resolution → Complete

Career Development — Employment Navigator

Assign Employment Navigator

Receive email alert of new client → Review income and employment details → Set employment goals → Monitor progress on employment goals → Connect to potential employers and update employment information → Complete

Financial Literacy — Financial Counselor

Client signs release of information → Review income and employment details → Manually enter client contact and household information → Complete Financial Health Assessment → Track client credit, debt, banking and savings → Track financial goals → Complete
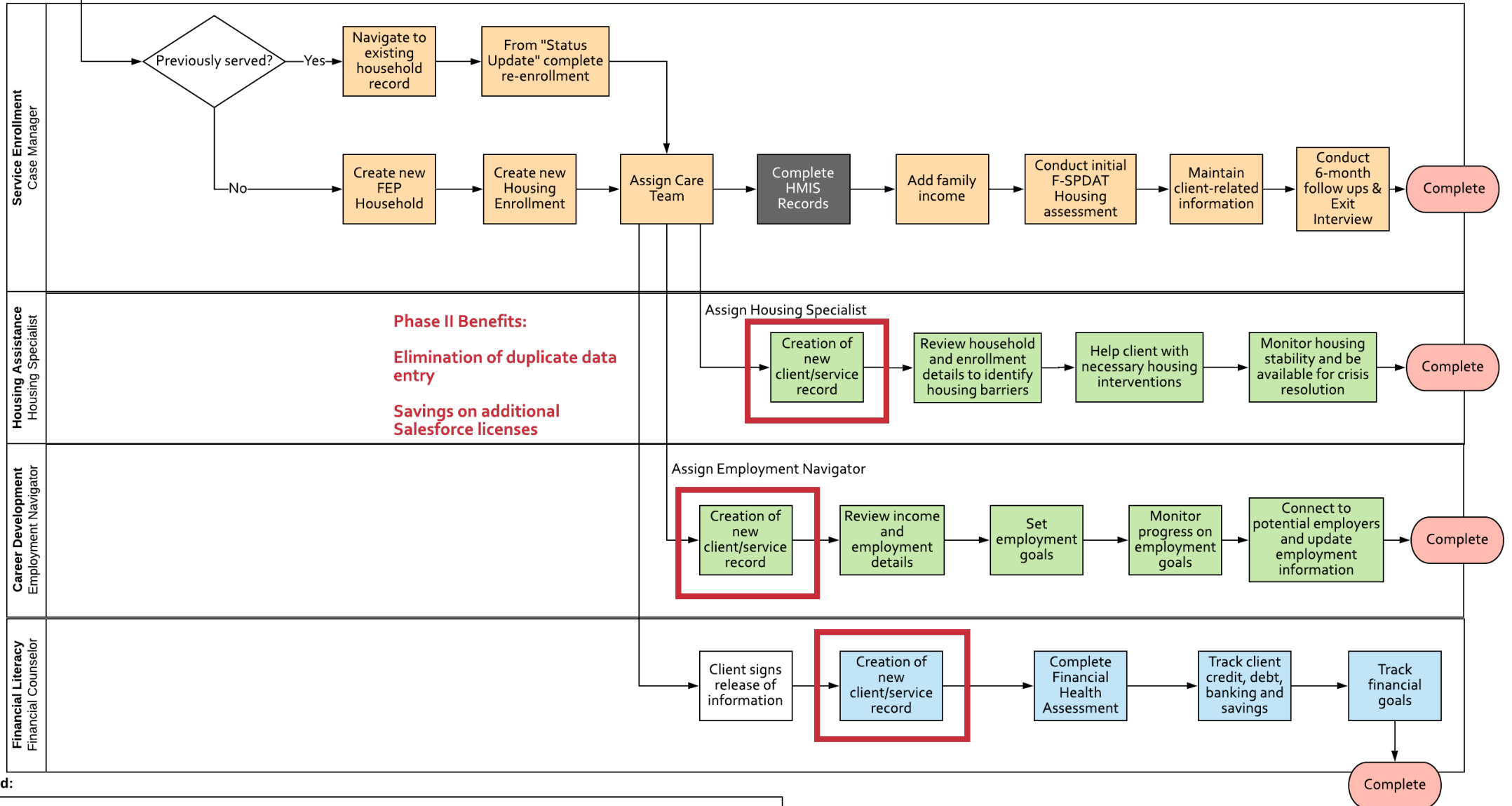
Phase I Benefit: (Optional) Integrate FEC Salesforce data to CTA Home for comprehensive reporting on housing and financial information

Legend:
- United Way Salesforce
- FEC Salesforce

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Housing Program (Ph. 2 Future State)

Service Enrollment / Case Manager

Family arrives at Safe Haven / Catholic Charities

Previously served?

Yes → Navigate to existing household record → From "Status Update" complete re-enrollment →

No → Create new FEP Household → Create new Housing Enrollment → Assign Care Team → Complete HMIS Records → Add family income → Conduct initial F-SPDAT Housing assessment → Maintain client-related information → Conduct 6-month follow ups & Exit Interview → Complete

Phase II Benefits:

Elimination of duplicate data entry

Savings on additional Salesforce licenses

Housing Assistance / Housing Specialist

Assign Housing Specialist

Creation of new client/service record → Review household and enrollment details to identify housing barriers → Help client with necessary housing interventions → Monitor housing stability and be available for crisis resolution → Complete

Career Development / Employment Navigator

Assign Employment Navigator

Creation of new client/service record → Review income and employment details → Set employment goals → Monitor progress on employment goals → Connect to potential employers and update employment information → Complete

Financial Literacy / Financial Counselor

Client signs release of information → Creation of new client/service record → Complete Financial Health Assessment → Track client credit, debt, banking and savings → Track financial goals → Complete

Legend:

- United Way Salesforce
- Existing Client Management System or Home App (Optional)
- FEC Salesforce

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SUCCESS STORY: COMMUNITY TRANSFORMATION

WESTSIDE CONNECT

Westside Connect partners are committed to improving the health and well-being of individuals and families by providing wraparound services to residents in need. Westside Connect was developed to allow a variety of agencies to identify essential needs and ensure individuals and families are linked to vital resources. Westside Connect embraces the concept of "no wrong door" where residents will get the help they need regardless of which organization they turn to for help first. TechBridge designed an integrated data solution that streamlines how agencies work together to ensure residents are linked to direct support and provision of essential services.

Westside Connect is able to engage additional partners and funders in supporting multi-agency collaboration, identify and address gaps in community service, and achieve a more effective system for person-centered care coordination.

CLIENT OUTCOMES:
- HOUSING PLACEMENT
- HOUSING RETENTION
- JOB PLACEMENT
- JOB RETENTION
- PRIMARY HEALTH CARE PROVISION
- BEHAVIORAL HEALTH CARE PROVISION
- FOOD SECURITY
- CHILDCARE AND EDUCATION

"No Wrong Door" Screening Form

31 Questions

8 Categories

- Childcare
- Health
- Employment
- Benefits Screening
- Behavioral Health
- Housing
- Financial Services
- Community Safety

6 Community Organizations

Multiple Eligibility Criteria

Childcare Section of "No Wrong Door" Screening Form

- **List the number of children you have in the following age groups?** Open-ended question
- **How many of your school-aged children attend school?** Open-ended question
- **If you have a child under 5, please indicate if they attend:** pre-K, caregiver home, etc.
- **Are you interested in resources related to finding childcare or afterschool care?** Yes

Childcare/Afterschool Care needs identified

Client needs assistance with finding afterschool care

Client needs assistance with enrolling child in pre-k, preschool, or childcare

client has a school aged child not enrolled in school

Pregnant woman/teen, or already a parent?

Yes

No

Families First

Referral Agency

Eligibility Criteria

Childcare

YMCA of Greater Atlanta (child under 3)

Bellwood Boys & Girls Club (school age)

Urban League of Atlanta

Street Smart Youth

Hollis Innovation Academy Parent Liaison

Referral Agency

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Westside Connect

- Families First
- Chris 180
- On the Rise
- Community Health Workers
- Quest CDC
- Integrity

Westside Works

- Per Scholas
- CEFGA
- YMCA
- Levy
- Center for Working Families
- Literacy Action

CTA Home Application

- Childcare & Education
- Health
- Behavioral Health
- Food Security
- Benefits Screening
- Financial Services
- Housing
- Safety
- Employment & Job Training

Outcome Reports & Analysis

Data Warehouse

Westside Connect

Data Source	Partner
Spreadsheets or Case Management Module of HOME	Community Health Workers
Care Logic	Chris 180
MS Dynamics	Families First
Pathways CRM	On the Rise
Client Track	Quest CDC
Salesforce	Integrity

Westside Works

Data Source	Partner
Salesforce	CEFGA
E.T.O.	Center for Working Families
Spreadsheets or HOME Case Management	Levy
Salesforce	Literacy Action
Salesforce	Per Scholas
ChildPlus	YMCA

Siloed resident data... → ...strategically shared... → ...to know which residents are achieving the best outcomes and why
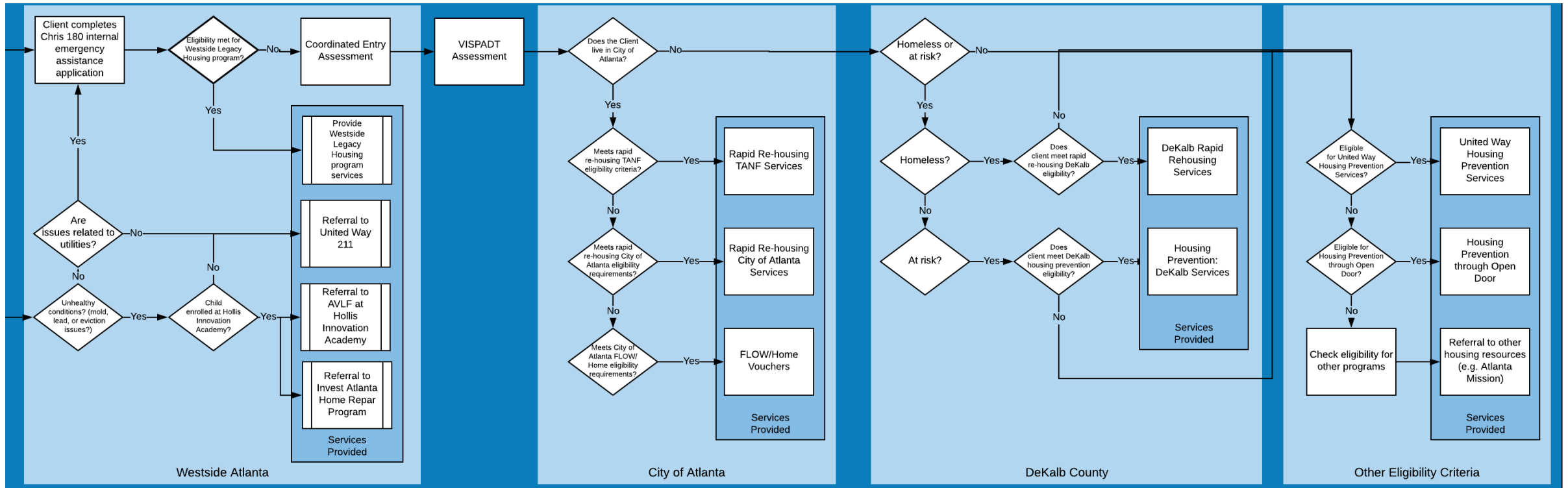
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A multi-service agency receives referrals for 5 types of services they provide:
Benefits Screening
Behavioral Health
Childcare
Food Security
Safety

RECEIVING REFERRALS FOR HOUSING

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Eligibility Requirements and Referrals to Multiple Organizations Based on Criteria for Health Services

Community Health Workers Referral Received

HOME Coordinated Care → Referral & NWD Intake Form Data → Spreadsheets? HOME Case Management Module?

Need Identified

- Resident does not not have a doctor that they see for an annual checkup
- Resident does not have health insurance
- Resident states they go to the emergency department when they are not feeling well
- Resident is interested in resources related to finding a doctor or getting health insurance

TBD Eligibility Form

Conduct follow up questions → Client has ID, Proof of Income, Insurance card?

Client Eligibility

- Eligibility: Hollis Innovation students and siblings → Care Center at Hollis Innovation Academy
- Eligibility: Proof of Identification and Proof of Income (if applicable) → HEALing Communities Health Center
- Eligibility: Proof of Identification and Proof of Income → Good Samaritan Health Center
- Eligibility: Photo ID, Health Insurance Plan Card, Referral or Authorization Forms, All current medications in their original container → Grady Health System: Asa Yancey Health Center
- Eligibility: Insurance card (if applicable) Proof of Income → Mercy Care at City of Refuge
- Eligibility: Valid photo identification, proof of income → Family Health Centers of Georgia at West End

External Referral

United Way 211

Health

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SUCCESS STORY: WORKFORCE DEVELOPMENT COLLABORATIVE

WESTSIDE WORKS

Westside Works is focused on helping Atlanta Westside residents obtain job skills training and employment. Integrity CDC is the managing partner for Westside Works and they are responsible for the recruitment and assessment of participants. Participants are then referred to the job training programs offered by Westside Works; such as, culinary, child development associate, construction, and information technology. TechBridge helped the Westside Works partners to improve the client journey experience from case management, to job training programs, to employment, to financial success.

Westside Works

Construction Education Foundation of Georgia (CEFGA), (Construction)

Integrity Community Development Corporation (Westside Beautification)

Levy Restaurants (Culinary)

Literacy Action (Literacy to achieve employment success)

Metro Atlanta YMCA (Child Development Associate)

Per Scholas (Information Technology)

The Center for Working Families (TCWFI), (Certified Nursing Assistant)

Westside Works provides access to **services that foster job success**; such as,

- Skills assessments

- Supportive services to overcome employment barriers

- Skills based job training programs

- Job readiness preparation

Desired Outcomes:

- Completion of skills-based job training programs

- Gaining credentials and certification

- Job placement rate

- Job retention rate

- Livable wage employment rate

relationship ID rId2 was not found in the file

4. Intake Interview & Job Training Placement

Client arrives at **Integrity CDC** for Intake Interview with intake specialist/ case manager

Intake Interview

Review Initial Assessment, O'Net, and TABE results in Salesforce

Conduct Intake Interview

Recommendation: Integrity CDC to incorporate ISP and ISP goals into their regular case management practice

Develop Individual Service Plan (ISP) and define ISP goals

Recommendation: Integrity to invest in necessary Salesforce updates to track ISP and ISP goals on the client case record

Document ISP & ISP goals in Salesforce under client case record

Connect client to supportive services

Recommendation: Place all referral partners into Salesforce to enable Integrity to track specific referrals made to organizations for each individual.

Document supportive services in Salesforce as external referrals

TABE Remediation

Client achieves satisfactory TABE score?

Client applies to preferred training program(s)

Case manager helps client determine program preference based on TABE Score and assessment results

Client Status Pending Placement in Job Training Program

Yes

No

Recommendation: Culinary students are able to move forward in job training with a TABE Score of 4.0 but should still explore remediation to improve literacy.

Client referred to NET Program: Job Readiness at Integrity CDC (<3.5) or Literacy Action (3.5 - 5.5) to improve TABE Score

Client retakes TABE

cement

Client Accepted?

No

Training partner notifies Integrity of program denial & reason

Client meets with Case Manager to improve application/ TABE Score and re-apply to programs

Yes

Client retained until placement?

Recommendation: Literacy Action to upgrade their Salesforce system to enable referral data sharing between Integrity CDC and Literacy Action systems.

Continue to meet with CDC Case Manager

Yes

Client remains active in referral programming?

Yes

Client Status: Accepted to Job Training Program

Required documents are shared with training partner

Continue to **Job Training, Case Management, and Employment Placement**

No

Complete (Note reason for drop-out in database)

Client Status: Drop-Out

No

WESTSIDE WORKS JOB TRAINING PLACEMENT

Client is placed with Partner Program → **Who will provide case management?**

- Per Scholas, TCFWFI → **Client case is transferred** → **Client Status: In Active Job Placement Program**
- CEFGA, YMCA, Levy Restaurants → **Client case is retained with Integrity Case Manager** → **Client Status: In Active Job Placement Program**

Client Status: In Active Job Placement Program → **Partner completes intake with client** → **Client progresses through job training program**

Recommendation:
Integrity CDC assist with Partner intake by providing the following data elements:
- *Client contact info*
- *Client demographics*
- *TABE Score*
- *Assigned Integrity Case manager contact information*
- *Client drug screening and living situation*

Recommendation:
YMCA and CEFGA schedule regular check-in with Integrity Case Manager, other partners should do the same.

Recommendation:
Partners should report back to Integrity on each individual referred and provide status update including:
- *Did client graduate program?*
- *Did client drop-out of program?*
- *Is client Looking for job?*
- *What are client's current wage and benefits?*
- *Is client in need of additional supportive services?*

Client progresses through job training program → **Partners currently report to Integrity on aggregate training and employment metrics** → **Client graduates?**

- Yes → **Client placed in job?**
  - Yes → **Client Status: Employed** → **Client retained in Integrity Case Management for 1 year** → **Client retains employment?**
    - Yes → **Complete**
    - No → **Client Status: Unemployed**
  - No → **Client Status: Unemployed**
- No → **Client Status: Drop-Out**

Client Status: Unemployed → **Client responsible to contact Integrity Case Manager and determine next steps**

Client Status: Drop-Out → **Client responsible to contact Integrity Case Manager and determine next steps**

Recommendation:
Conduct post placement follow up with clients to continue capturing wage and employment data longitudinally.

Recommendation:
Partner to notify Integrity CDC of program drop-out.

UTILIZING CLIENT JOURNEY MAPS TO PREPARE FOR TECHNOLOGY

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THE VALUE OF CLIENT JOURNEY MAPPING

New Technology + Old Processes

=

Really Expensive New Technology

DEVELOPING YOUR OWN PROCESS FLOWS

Business process maps are designed to define how data will flow through an information system from start to finish.

Keep it Simple: A critical component of any process flow is for it to be usable. Limit your processes to a single page. Simple is better. Remember, a process map is something a staff member should be able to reference quickly in the middle of a busy workday. While some processes are simply too complex to fit on a single page, these should be the exception to the rule, not the norm.

Keep it Future Focused: Client journey maps should always capture the "future state" of how things will be done once an appropriate technology solution is in place. The first step in doing this is to understand how things are currently being done; and identifying areas of improvement. A good discovery phase involves reviewing existing documents and preparing questions that help staff members reflect on the pain points of what they are doing. Below are the documents that can help in developing a client journey map:

- Intake forms
- Assessment forms
- Client Surveys
- Spreadsheets for major reports
- Any other documents where client data is captured or reported

RESOURCES

Content
- Council on Accreditation www.coanet.org
- Google Corporate examples/Customer journey software/business process flows

Tools
- Start with a White Board
- Lucid Chart www.lucidchart.com
- Microsoft Visio www.Microsoft.com
- Draw.io www.draw.io

- First-time users should dive into learning by creating a practice deliverable from the "detailed flow-chart" template. Don't let the tool intimidate you. Most users will pick it up in a few minutes and master it in a lifetime. Your first flowchart or two will be ugly. It's ok – you will improve with each project as you go and there's a wealth of help resources available to help when you get stuck.

QUESTIONS?

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ADDITIONAL RESOURCES

EXAMPLE OF OUTREACH
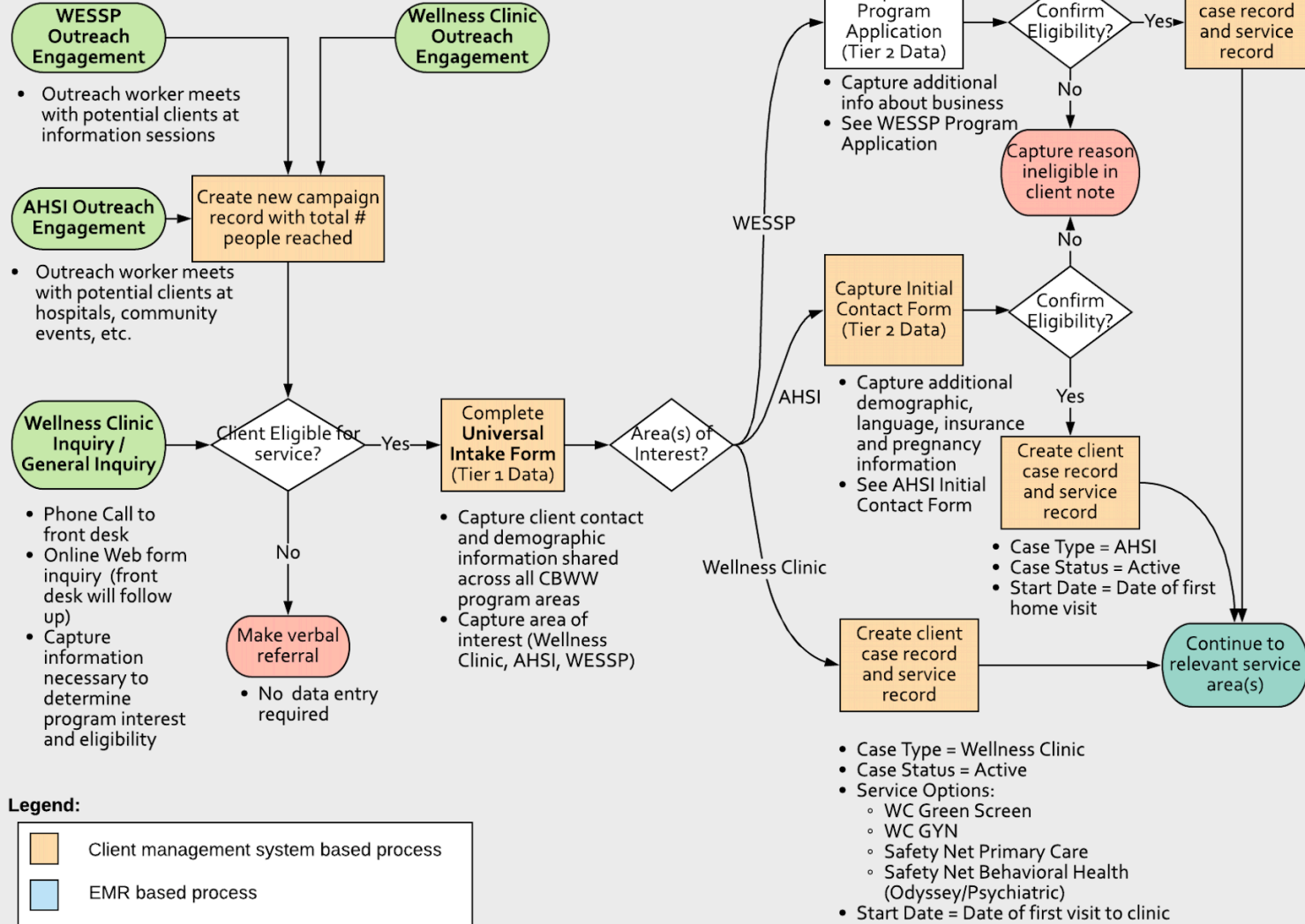
EXAMPLE OF ASSESSMENT: FOSTER PARENT PROCESS

Childkind
Initial Licensure Process
Updated: December 2017

Example: Inquiry Process for an Early Childhood Development Center

2. Inquiry

Phone Call Inquiry from potential client or referral → Valid Inquiry?
- Yes → Create **new program lead** → Capture **referral information** → Capture **basic information** and **service type(s) requested** (ECDC or Residential)
- No → Provide **referral resources** by phone → Complete (hang up phone)

Check **capacity** in database for relevant service types → Service type(s) requested?
- ECDC (Non-Residents) → Capacity in ECDC Program?
  - Yes → Send potential client **ECDC Online Enrollment Form** → Schedule ECDC Enrollment Interview → Continue to **3A. ECDC Enrollment (Non-Resident)**
  - No → Add to **wait list.** Follow-up when space opens
- Residential → Send application pre-screening → Passes **Pre-Screening?**
  - No → Complete (Not Qualified) Email Referral Resources
  - Yes → Qualified (Convert to Contact and mark as Application Screening) → Schedule Application Screening → Continue to **4A. Residential Application**

Add wait list for residential as well?

Web Form Inquiry from potential client or referral → Database auto-create program lead → New Program Lead automatically added to Web Form lead queue → [Title] reviews web form program lead queue daily → Valid Inquiry?
- No → Send services declined email with referral resources → Complete (Remove from lead queue)
- Yes → Check **capacity** in database for relevant service types → Follow up with inquiry via phone call/email

What role is best to manage program leads?

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Example of Intake for an Early Childhood Development Center

Non-Resident scheduled for ECDC enrollment interview → **ECDC Director/ Assistant Director** reviews calendar and calls potential client with reminder → Potential client shows up to interview?

- No → Attempt to reschedule → Mark as **"No Show"**
- Yes → Non-Resident meets with ECDC Program Director → Completed ECDC Online Enrollment Form?
  - Yes → Database logs summary information from enrollment form
  - No → Program Director accompanies potential client to computer lab

Brought required forms?
- No → Schedule follow up to bring required forms
- Yes → Scan forms

Scan forms → Provide campus tour → **ECDC Director/ Assistant Director** shares pricing based on rate card → Decides to Enroll?
- Yes → Capture $50 Enrollment Fee
- No → Mark child/children contact records as **inactive** → Capture note with reason for not enrolling → **Complete**

Resident scheduled for ECDC enrollment interview on move in day → Resident meets with ECDC Program Director → Resident accompanied to computer lab to complete Online Forms → Mark child/children contact records as **enrolled**

Capture $50 Enrollment Fee → Mark child/children contact records as **enrolled** → Capture program start date → add children to class rosters → **Non-Resident** Capture payment preferences (check, credit card) → Confirm emergency contact, address → Child of Resident?
- Yes → Return to **4A. Residential Application & Enrollment**
- No → Continue to **3B. ECDC Assessment and Service Delivery**

5B. ASP Assessment and Service Delivery

Example of After School Program Assessments and Service Delivery

Daily Programming

- School bus drops children off to RV ASP
- Teacher has prepared daily lesson plan based on Chick-fil-A Core Essentials, GA Standards, Kahn Academy, and Seimens curriculum
- Child completes daily scheduling, activities, and volunteer-led homework help
- Teacher logs daily attendance
- Parent/Guardian picks child up at end of day

Admin. Functions

- Any admin functions? (vaccinations, allergy forms, review approved pickup contacts, etc.)

Parent Activities

- Teacher logs parent/guardian attendance
- Parent/Guardian engages in parental involvement activities
- Parent/Guardian attends Tuesday night community dinners/Circle Program

Assessment

- Child completes WRAT behavioral assessment conducted 3x per year
- Teachers monitor child's e-class account (supplied through school system) for grades, report cards, and homework
- WRAT behavioral assessment results and report card grades are logged into client management system

Case Management

- Return to **4B. Residential Service Delivery**
- Child case manager tracks case notes, external referrals, and IEP in client management system
- Teachers assist case managers with development of IEP

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Example of Service Delivery for Transitional Housing Program

4B. Residential Service Delivery, Case Management, and Aftercare Planning

Resident Kickoff

Resident arrives for kickoff with case managers → Document baseline **employment status** and **income** → Document baseline scores on Arizona Self-Sufficiency Matrix → Develop ISP and ISP goals based on Arizona Self-Sufficiency goals → Schedule **financial literacy meeting** with Operation Hope and add to Salesforce calendar → Schedule **evaluation of ISP goals** every 90 days on Salesforce calendar → Log notes from **kickoff meeting** and capture hours spent with resident

Programming

Resident referred to **external referral partners** ← Capture **program attendance** and **hours** ← Conduct regular home inspections and log serious infractions in database ← **Meet with Case Manager 2x/month** and log case notes and hours ← **Children <5** Resident completes **3B. ECDC Service Delivery** (Resident) ← **Children 5-18** Complete **5B. ASP Service Delivery**

Conduct 90-Day Evaluation

Evaluation

Review program attendance, home inspection infractions, and case notes from bi-weekly meetings → Follow up on progress with **referral partners** and log notes in activity history → **Document** updated scores for **Arizona Self-Sufficiency Matrix** → Document progress on **existing ISP goals** and **create new ISP goals** → Update **employment status** and **income** → Resident **retained** in program?

Yes / No

No → Continue to **4C. Exit Interview and Alumni Program**

Example of Case Closure and Aftercare Planning

Thank You!

Slides will be provided to all attendees

Speaker Contacts:

Karen Cramer: kcramer@techbridge.org

Linda Min: lmin@techbridge.org

Thanks for joining us today and please remember to fill out your feedback survey!: https://www.tfaforms.com/4800130