



CAM Transition Team Meeting

February 1, 2022



Agenda

Topic

Welcome/Introductions/Updates - Tasha introduced Cindy Crain of OrgCode, who will be providing CAM consultant services. OrgCode has worked with the Detroit CoC on several projects with the most recent being the Gap Analysis. OrgCode was also one of two consultants that worked with HAND to establish CAM in 2013

CAM Decision Points Review and Discussion – Salesforce and Vonage

Contingency Plans

CAM Operations

Subcommittees – Updates

Project Management and Strategy	<ul style="list-style-type: none">• Selected OrgCode (RFQ, Project Management, Communications, Training, etc) and CSH (Technology Plan and Transfer and Funding)• Held Two-Day Applicant Informational Workshops with about 37 attendees each day
Funding	<ul style="list-style-type: none">• Held preliminary meetings with the City of Detroit, City Council, and McGregor
PWLEH	<ul style="list-style-type: none">• Finished the last of three focus groups yesterday; info will be compiled and shared with Transition Team
Data and Technology	<ul style="list-style-type: none">• Met with Salesforce

CAM DECISION POINTS –

Salesforce Revisited

CAM DECISION POINTS – Salesforce

Notes

- After the Data & Tech Subcommittee meet with Southwest and Salesforce this week, they learned the following: SWS owns the contract and there is no guaranteed that the data can be transferred to a new build out
- It is recommended that the new Lead Agency be required to use Salesforce rather than allowing them to select their own CRM for continuity of services and data
- Kiana presented two options of transferring the current contract to a current CoC agency or transferring to the new Lead Agency. See related document shared during the meeting.
- The team voted to transfer the contract to a current CoC provider.
- The Data and Tech Committee will meet to identify potential providers to transfer the contract to. Said providers will have a contractual and financial obligation and would be responsible for maintaining the system.

Contingency Plans

- During the transition, we must ensure current operations remain intact so that clients continue to receive services. We must pre-plan for "just in case" scenarios
- Critical Planning: pain points, least disruption to clients, and funding
- Notes
- Due to time constraints, Tasha introduced the topic but discussion will occur next week

Contingency Plans – Front Office Options

- **Access Staffing** - Hire Contract Staff – there are several staffing companies that specialized in social work staffing (i.e. Robert Half)
- **Shelter referrals** - Shelters to receive shelter residents directly (w/o referral from CAM)
 - Could do for all shelters or a identify certain shelters (ie. Large shelters, single shelters, etc)
 - Considerations: data quality, training, disruption to clients, CE data collection elements
- **Prevention** - Direct prevention calls to the Department of Housing Services hotline
- **YHDP Access** - Train Street Outreach/Shelter Navigators to enter YHDP CE Intake data directly into HMIS.
- **CAM Line** - Direct calls to a current line operated by another provider (i.e. 2-1-1, Wayne Metro)



Contingency Plans – Back Office Options

- **Referral Coordinator Role** – Subcontract to another agency
- **BNL Management** – Subcontract to another agency
- **Navigation Scheduling** – Subcontract to another agency
- **Lessen Data Entry** – Salesforce Intake Form transitioned to the basics
- **Possible reduction of Access Point hours** -from 9am-6pm to 9am-5pm to ensure more calls are captured in the beginning of the day when the volume is highest
- **YHDP Subcontract** - SWS YHDP-funded positions to another agency
- **HCV apps and recertification**
 - Moving-UP
 - EHV



CAM Operations Update

Notes

- There have been no new staffing transitions since the last update
- SWS is considering ways to counter the need to enact contingency plans and will share with the current ops subcommittee for discussion
- SWS is considering reducing hours from 9 am –6 pm to 9 am – 5 pm. Concerns were raised about the reduction in hours

Salesforce Review & Recommendation Discussion

RFQ Recommendation:

Data & Tech Transition Subcommittee met 1/30/2023 & are **recommending that Salesforce be required by the New Lead Agency.** We are recommending this language be built into the RFQ. This decision is based on further discussion with current lead agency & partner agency CHS, as well as a meeting with Salesforce. The current instance of Salesforce we are using in the Detroit CoC is ingrained in the CE workflow and modifying it at this time would cause a significant barrier in operations.

Current Salesforce Set-Up – How do we keep what we have built?

What we know:

- Current Salesforce Contract ends 10/31/2023
 - There are currently 49 licenses associated with the SW Salesforce Platform (Currently SW & CHS staff have licenses)
- SW will relinquish CAM 8/31/2023
- New Lead Agency will be effective 9/1/2023 (Transition activity to start in June 2023)

What we learned (Data & Tech Committee small group meeting with Salesforce 1/30/2023):

- The contract for this salesforce set-up **is owned by Southwest.**
- The initial build & application modifications were all handled through Messina group. They chose Salesforce as the platform for implementation.
- It is not possible to take their salesforce build, lift it, clone it and move it elsewhere. It would need to be rebuilt and then data would need to be migrated into it. This would require time and money. There is also a risk involved in reliably migrating the data from one build to another.
- **It is possible to AMEND the existing contract and assign ownership to another entity.**

Proposed Amendment Recommendations:

- **Option 1a – Amend Contract & Assign Ownership of existing Salesforce Instance to a Current CoC Organization**
 - Key Benefits:
 - Ensures continuity of the system before, during, and after the transition.
 - Prevents similar issues from arising in the event the new Lead chooses to give up their CE Contract in the future.
 - Should allow for all the contract terms and conditions (including pricing) to continue 'as is'.

- Key Considerations
 - SWCS and Salesforce need to be willing to amend the current contract to designate selected agency as the new owner / responsible party.
 - Selected agency will need to be willing to assume the terms and conditions of the contract, assume the financial responsibility of the contract, and coordinate billing issues with the new Lead agency.
 - Selected agency would be responsible for ‘administering’ the platform including any modifications to fields, automation rules, etc. They may or may not have the staff willing or able to perform those system administrative functions.
- **Option 1b – Amend Contract & Assign Ownership of existing Salesforce Instance to the New Lead Agency**
 - Key Benefits:
 - Transferring the ownership of the SWCS build to the new Lead agency, once they are selected and onboarded, to avoid potential contract issues as SWCS ramps down.
 - Key Considerations:
 - This option will need to wait until the new Agency is selected and has been onboarded.
 - The terms and conditions of the contract will depend upon the type of agency that is being selected as the new CAM Lead. (i.e. non-profit vs government entity).
 - The new Lead Agency would be responsible for ‘administering’ the platform including any modifications to fields, automation rules, etc. They may or may not have the knowledge (of the system, use, etc.) or experience needed to perform these functions.