



CAM Transition Team Meeting

January 18, 2022



Agenda

Topic	Time
Welcome and Updates	9:00 am
CAM Decision Points Review and Discussion – Salesforce and Vonage	9:05 am
CAM Operations	9:45 am

Subcommittees – Updates

Project Management and Strategy	<ul style="list-style-type: none">• Reviewing responses to CAM RFP Consultant; should be onboarding consultant by late January/early February
Funding	<ul style="list-style-type: none">• Meeting January 23rd to discuss budget gaps and identify resolutions
PWLEH	<ul style="list-style-type: none">• Holding first focus group with PWLEH on 1/20 in-person at shelter

Transition Work - Update

➤ Funding

- A Preliminary budget developed by HAND has identified some gaps; working with EC and will bring to the appropriate subcommittee and transition team meeting after meeting with EC

➤ CAM Workshop

- Holding a two-day workshop to prepare CAM applicants for submission of their RFQ. Goal of workshop is to help jump start their planning process ahead of the RFQ

CAM DECISION POINTS – What are we missing?

CAM Structure (in-person only, call access only, hybrid, other)	Assessment Tool
CAM Services (all current services or some services)	Current CAM Staff Role with New Lead Agency
Technology (Salesforce, Vonage Phone System, etc)	Standardized Training – need to articulate commitment to DEI and person-centered work
*RED= Additions during the 11/30 meeting	

CAM DECISION POINTS – Discussion for Today

CAM Structure (in-person only, call access only, hybrid, other).	Assessment Tool
CAM Services (all current services or some services)	Current CAM Staff Role with New Lead Agency
Technology (Salesforce, Vonage Phone System, etc)	Standardized Training – need to articulate commitment to DEI and person-centered work

CAM DECISION POINTS – Salesforce

- Will we expect the new agency to utilize the Salesforce system currently being utilized by CAM?
- Considerations: costs, training, duplication with HMIS, data collection and reporting capabilities beyond HMIS, historical data/reports, connection/compatibility with other systems (i.e. Vonage), capabilities, advantages/disadvantages

CAM DECISION POINTS – Salesforce

Notes

- Before Salesforce, CAM did HMIS data entry but it was hard to operationalize HMIS data for CAM. As a result, they had to use HMIS, intake forms, and spreadsheets
- SWCS worked with a consultant to explore options and landed on Salesforce. It was customized for coordinated entry. It moved all work from spreadsheet to one database to reduce manual work and collaborate better with CHS
- At the time, Salesforce was identified as the best option presented. If changes are made or SF is no longer utilized, workflows and processes that are built around SF will need to be figured out

CAM DECISION POINTS – Salesforce

Notes

- SF's day to day usage includes - intake form, data entry, tracks all the work that move someone from access to referral and the coordinating work that happens with CHS. Prevention assessment, financial assistance, By Name and Prioritization Lists are in SF
- SF's end user experience is not complicated. The biggest learning curve is the back-end system management. CAM staff manages the back-end administration of Salesforce.
- SF is currently paid by private funding but is believe to be an eligible costs under CE-SSO grant
- Follow Up: SWCS will research the ownership of the SF build out. Can the build out be transferred and if so at what costs? SWCS also to report out what other costs are subsidized by funding outside of CE-SSO grant for CAM
- Additional Notes on SF: https://3139643666-my.sharepoint.com/:x:/g/personal/tasha_handetroit_org/ETvUJiukpr5Fkc8u-NfxA58BKoVsMq-nLnFJf6p9iNs8Nw?e=sJtaNJ



CAM DECISION POINTS – Salesforce

Notes

- Open to other CRM databases if they can get to the same outcome/results as Salesforce
- Q: If ownership be transferred, can SWCS pay for a couple of years up front with their current contract? A: This might not be possible to pay for something that they knowingly will not use.
- There will be a really tight window to get a new system online for both CRM and phone system. May need to use the current system as a bridge.
- Applicant needs to speak to continuity of services during the transition. What ideas do they have? It shouldn't 100% fall on the applicant. The CoC will need to own that too.

CAM DECISION POINTS – Vonage

- Will we expect the new agency to utilize the Vonage phone system currently being utilized by CAM?
- Considerations: costs, connection with other systems (i.e. Salesforce), capabilities, portability of number, call center functionality, advantages/disadvantages

CAM DECISION POINTS – Vonage

Notes

- There is not an option for access for people who are deaf or hard of hearing.
- No chat option with their current contract but the functionality does exist
- System was NOT chosen specifically for CAM. It is used agency-wide
- Vonage – not required but needs same/better outcome and phone system needs to be accessible deaf/hard of hearing/differ languages
- Can we post the workflow for the phone system in the RFQ?

- Veteran services – how is the alternative phone line be utilized? We need to get info about that as we plan for the RFQ and plan for how people are accessing the systems

CAM Operations Update

Notes

- Two intake supervisors have been selected – Arieona Branch and K'Lyn Jefferson