

Attachment A
Salesforce Use Case
YES Indy

Use Case Name: Youth Employment System (YES Indy) Program Management

The Youth Employment System (YES Indy) aims to provide supports and empowerment to Opportunity Youth through a combination of barrier busting supports, career services, education, training and job opportunities. EmployIndy, through a grant from the Lilly Endowment blended with Workforce Innovation and Opportunity Act funds, provides grants to community-based organizations to provide employment services to these youth in Marion county. Sub-grantees include: Community Alliance of the Far East Side (CAFÉ); Edna Martin Christian Center; Fathers & Families, Hawthorne Community Center; Keys to Work; Martindale Brightwood CDC; Mary Rigg Neighborhood Center; and Public Advocates in Community Re-Entry (PACE).

EmployIndy currently utilizes PactSafe to maintain grant contracts, which is integrated on a partner instance of Salesforce for customer relationship management, Financial Edge NXT to manage accounting, and Efforts to Outcomes (ETO) for case management and participant tracking. These disparate systems do not allow for an effective means of managing a complex, multi-faceted operation with deliverables and performance outcomes at the funder, program, and sub-grantee levels.

Project Objective: Incorporation of financial, contractual and programmatic data, outcomes, and history, via Salesforce, into interconnected data for dashboards and reports to better inform leadership and management in real time about program activities and progress.

Multiple Roles (Actors):

- Executive Leadership
- Directors
- Program Managers

Source Data Elements:

- Programmatic relationships
- Program outcome deliverables
- Contractual details
- Financial budgets and expenditures
- Employer relationships

All source elements are evolving with various real-time updates which will need to be refreshed at an appropriate timeframe to ensure up to date information.

Current Challenges:

- No linkage between data of programs to relationships, budgets or contracts
- No real-time data or visualizations available for review and tracking

Use Case Description: After the user logs in to the system, they are directed to the highest-level dashboard. From organizational or program dashboard, they can drill down by strategic priority, fund stream, program, contract, relationship types, etc.. The system will be responsive to drill down commands as well as possess the ability to aggregate back to the highest-level dashboard.

Hypothetical Flow:

- User logs in
- High level dashboard loads
- User navigates to and selects Programs which starts the drill down process
- System displays all programs which can be selected for drill down
- User navigates to YES (Youth Employment System)
- System will display rolled up data for the entire YES program including total number of contracts, total amount funded versus spent per contract and all aggregate participant data as defined in the core services report from ETO
- User can navigate to any of the contracts to view a drilled selection including main contact on contract, details of contract, specific participant performance within the contract
- User can maneuver between the high-level dashboard and the drill downs to each program, contract or expenditure by selecting specific links embedded to go forward or by hitting the back button to return to the next most rolled up view until all the way to the High Level Dashboard

Additional Requirements:

- Ability to review program activities within specific time frames
- Dashboard must also possess the ability to be exported as a standard PDF
- Dashboard must have multiple filters, grouping options, and sorting options to view specific information. These would create a temporary view of the information to be saved by an individual user as a custom dashboard for their future use.

Details for Use Case Demo:

- The YES program has 11 contracts, including 8 sub-grantees and 3 vendors
- Contracts are funded through multiple funding streams and some sub-recipients have contracts or awards under other funding streams
- Each sub-grantee contract has the same outcome deliverables but a variance in targets for those outcomes to be delivered via each contract. See Attachment B - Use Case Contract Deliverables.