

HOW NONPROFITS CAN USE TECHNOLOGY TO SUPPORT CLIENTS AND COMMUNITY: A CASE-STUDY ON REFERRAL NETWORKS

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The case for connected data systems in the nonprofit sector

The seemingly innocuous “referral” is a mainstay of nonprofit organizations (NPOs) and community-based organizations (CBOs), and is the basic unit of the interconnected supportive community; however, even in 2017 referrals are still largely shared via fax, phone and paper, which all lack the ability to establish accountability or to provide insights into the services offered. From its inception in 2012, MPN has taken a **collective-impact approach to community engagement and service delivery** in the creation of a 20-partner network which supports children and families along the educational and career continuum. An in-depth data-capacity assessment was administered to all MPN partners, which examined existing referral processes, and while all partner organizations make referrals, they did not have a way to track them or know if their client ever succeeded in making the connection. It was imperative that MPN require a method for **measuring the health of the partner network** and providing accountability as it relates to service integration. After 2.5 years of collecting referral data, MPN is now able to see trends such as the dependence on referral hubs and high- volume referral targets.

Building the MPN Case-Management System and Referral Tool

The MPN Referral Tool was built in 2014 as an expansion to the MPN Case-Management System, which was built utilizing a customized case-management system on top of a Salesforce platform. Instead of implementing “business as usual,” MPN disrupted the referral process in two major ways:

1. Referrals and resource lists are digital
2. Onus of referral follow-through is on staff, not client

When a referral is made, **the MPN platform alerts the organization they seek and puts the onus on staff to proactively reach out to the family.** The Referral Tool collects basic information about the client, including name, date of birth, contact information and preferred language. This is coupled with key information on the referral itself, including the outbound and receiving organization and program, contact information for receiving staff member, referral open and close date, referral status (i.e., open, closed, pending), note, and referral result and reason (i.e., successful, unsuccessful,

43%

of referrals occurred between unique organizations

64%

of all referrals created were successfully closed

2,303

individual families referred

4,389

referrals between Jan. 1, 2014 and Aug. 1, 2017

waitlist, not eligible, no response, registered). In addition, the client may be tied to a household which includes additional related individuals, such as children, spouse or parents.

Despite the technical solution for connecting nonprofit organizations, a major challenge was the adoption of the tool by nonprofit staff, given the fast-paced and understaffed NPO industry. To address this challenge, the team utilized a combination of technical and adaptive solutions to support adoption, including in-person training, quarterly network meetings with partners and the creation of individualized performance dashboards for programs. The combination of interpersonal and technical strategies led to the successful adoption of the tool and ultimately added value to the work.



Results

Between Jan. 1, 2014 and Aug. 1, 2017 the MPN network generated **4,389 referrals and impacted 2,303 individual families**, translating to an average of two referrals per family. Of all referrals, 42.6 percent (1,868) occurred between unique organizations. MPN Family Success Coaches (FSC's) — co-located at school sites and early learning program sites, and acting as service connectors and navigators for families — represent over half (58 percent) of all referrals. **Sixty-four percent of all referrals created were successfully closed:** 59 percent of those successfully closed led to program registration; and 31 percent led to information provided. Conversely, 15 percent of referrals were unsuccessfully closed. The leading cause of **unsuccessful referral closure was inability to contact the client** (56 percent), followed by lack of client interest (16 percent), client not eligible (13 percent), needs not in line with service provided (6 percent) and 1.4 percent were closed because the organization could not take on the referral.

FIGURE 1: Number of referrals created by Family Success Coaches, by target service area

Service area	Number of referrals	Percent of total
Financial stability	298	26%
Technology access & training	159	14%
Housing	158	14%
Workforce	125	11%
Legal	109	9%
College access	90	8%
Early education	84	7%
Adult education	49	4%
Health	39	3%
Parenting skills	23	2%
General resource navigator	19	2%
Out-of-school time (K-12)	9	1%
Community organizing	4	0%

MPN FSC's have some of the highest rates of successful closure leading to program registration (64.71 percent compared to a mean of 59 percent for the network). Referrals to a housing service had the highest rate of unsuccessful closure due to inability to contact client (80 percent compared to mean of 56.23 percent), which may reflect the crisis state of many MPN families seeking housing services. As indicated in the figures below, MPN FSC's located at the schools are hubs and make the greatest number of referrals, particularly in the early education sites and elementary school sites. Half of all FSC referrals were made to programs focused on building household assets and income, and close to a quarter of referrals were made to housing and legal services, which are the highest urgency needs in the community.

FIGURE 2: Referral volume among co-located Family Success Coach sites and areas of service need

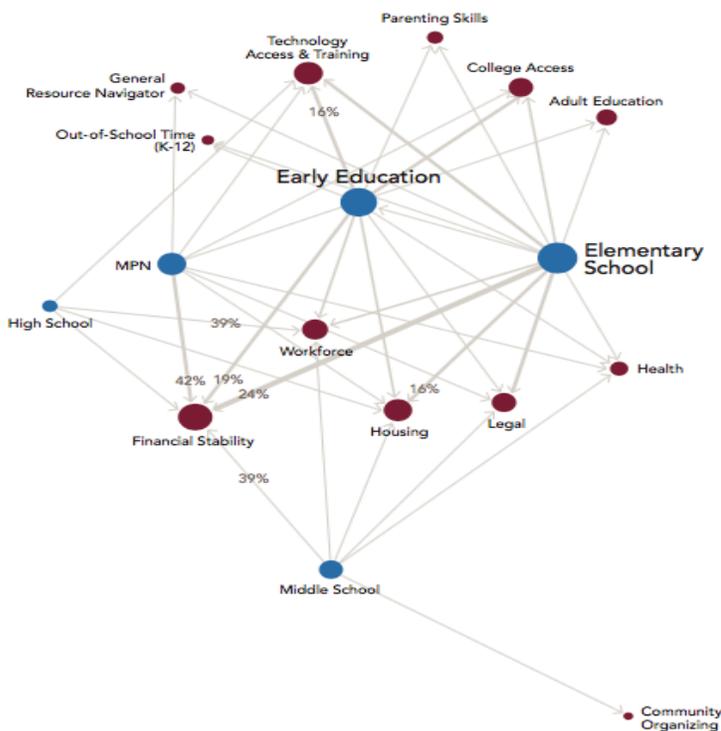
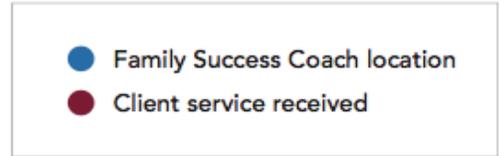
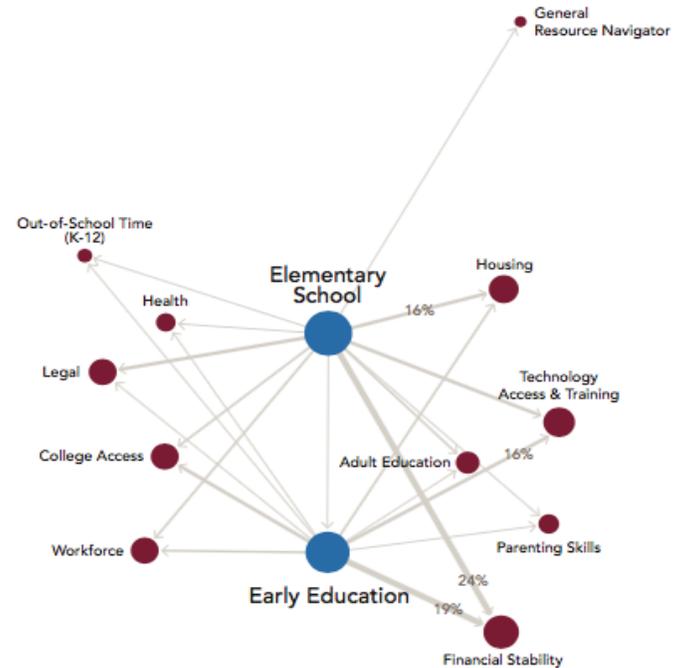


FIGURE 3: Referral volume and targets for Family Success Coaches co-located at early education and elementary school sites



Conclusions

The successful integration of the MPN Referral Tool and network **relies heavily on organization and staff consensus**, complemented by the development of program flows that allow for the adoption of new technology and facilitate integrity in the creation and closure of referrals. Implementation also depends on **a cultural shift in the nonprofit status quo** as it relates to communicating with other organizations and staffing. The distribution of referrals among Family Success Coaches and partner organizations speaks to the **need for network hubs**, staffed by highly specialized personnel dedicated to connecting families to services through referrals. Co-location of specialized staff in community locations, such as schools and learning centers, was also crucial to the success of the referral network. This can be seen in differences in referral volume between sites with high levels of parental engagement (elementary school and early education) and typically lower levels of parental engagement due to socially appropriate child development (middle and high schools).

While MPN Family Success Coaches made many referrals to housing, and those referrals were closed “successful,” anecdotal and narrative accounts shed light on some of the barriers experienced by clients and nonprofit staff, including extreme crisis and lack of available resources at a regional level. San Francisco is in the midst of an affordable-housing crisis, and while housing was a top referral topic, only two programs exist in the network to accommodate the need. Referral networks must be structured in such a way that they **support connection to the service areas most needed** by the community being served.

References

[1] Darrene Hackler, Gregory Saxton (2017). [The Strategic Use of Information Technology by Nonprofit Organizations: Increasing Capacity and Untapped Potential](#). Public Administration Review, June 2007, 474-487.

[2] Kristina Jaskyte (2012). [Exploring potential for information technology innovation in nonprofit organizations](#). Journal of Technology in Human Services, 30:2, 118-127.

Evaluation Methods



The successful implementation of the Referral Tool has been evaluated through network mapping, GIS mapping, descriptive statistics and longitudinal analysis. Outbound referral data were aggregated, including originating organization, receiving organization, referral topic and closure status. Network analysis was conducted through aggregating referral data for each of the Family Success Coach co-location sites and for the target referral area. Mapping was conducted using Google Fusion Tables and network graphs.

About Mission Promise Neighborhood

The Mission Promise Neighborhood is a citywide community partnership that was created to support kids and families living, working and attending school in the Mission District. It brings together schools, colleges, community organizations and community leaders to help kids graduate and families achieve financial stability.

U.S. Department of Education Promise Neighborhood Initiative Grant #U215N120046.

Questions? Comments?

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2914-01082018