Proposal to improve communication and documentation

at **the point**

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# Overview

The Point is a life-changing resource for our residents and serves as both a home and a chance to be part of a community for them. Our duty is primarily to help them feel safe and secure-- and to reach self sufficiency-- to the best of our abilities. This includes effectively storing and organizing their information; this can be done far more efficiently if we adopt and implement the use of property management software.

Currently there is no real system of resident recordkeeping that is available to anyone but certain managers. The extent to which most of us have access to resident information is a set of rather poorly managed Excel spreadsheets, which frequently are missing pertinent information and are not comprehensive or well-organized enough to be effective. Staff frequently find ourselves lacking crucial updates and personal information that would assist us in handling residents’ needs.

# The Objectives

## Further ensure our residents’ safety and well-being.

Front desk staff do not currently have any type of real access to resident emergency contact info or potential medical issues unless they have been recently mentioned in the daily log (which is not typical). A few residents have a relative noted in the room assignment spreadsheet, but this is rare at best. We also do not have an on-call manager in any official capacity during night or weekend hours; we are told that we can call them in case of emergency, but when such emergencies have arisen in the past, we are typically unable to get ahold of anyone.

Simply put, we are the front lines of support for the residents most of the time. We see them the most often, and we are more likely to see them at their worst or most vulnerable. If they have a medical condition, allergy, substance problem, abusive ex-partner who stalks them, or anything else that could result in a critical situation, we need to know and be able to access that information so that we may act on it in the resident’s best interests. We cannot help if we do not have the means, information, or resources to do so. These are the types of things that would be essential to have saved in a resident’s file for easy access and utilization, and we would have the ability to add notes and updates to each resident’s file as needed.

## Logistics and information efficiency.

Property management software would indeed provide an excellent, organized method for storing information about our residents and their needs. It would also be an incredibly useful method with which to store information about their tenancies and histories. It would be beneficial for both logistic and legal purposes to have a record of tenant lease violations, late payments, write-ups, behavior plans, meeting attendance, emergencies that occur during their tenancy, and other pertinent occurrences or information. There are options available to upload documents of this nature, including lease agreements or recommendations from medical/mental health personnel, etc.

We should also explore the options for better and more efficient communication between staff members/management. Slack and the logbook can be helpful but are not quite organized enough to be easily utilized when information is needed. We are frequently finding that critical information is not being shared.

Many property management software also includes tools for managing maintenance requests, inspections, and online/automatic rent payments, all of which are extremely useful and would greatly benefit everyone involved, making the process of tracking work orders and keeping records easier for maintenance personnel especially. Switchpoint is also growing rapidly; the more residents we take on at our various facilities, the more these tools would benefit us in keeping things efficient and organized.

## Improve residents’ sense of community.

It states right on the Switchpoint website’s mission page that one of our priorities is building a community for our residents to belong to. We also claim to prioritize identifying every individual’s underlying issues contributing to their poverty and homelessness, and aim to assist them with a comprehensive plan and guidance on their journey to self-sufficiency.

The circumstances that often lead to homelessness and poverty are frequently deeply personal issues about which people are unlikely to address with just anyone, such as addiction, abuse, or mental health conditions. We need to create an environment where they are comfortable and feel supported and secure by everyone in Switchpoint’s employ, to the degree that they feel comfortable discussing such sensitive personal information with us in order to best help them.

A small but essential part of emanating this sense of community is really getting to know our residents. Keeping a record of each resident in which we store information such as their birthdays, special issues, or preferences (triggers or upsetting things, favorite meals or activities, family background, etc.) would go a long way in helping us get to know each resident and help them to feel valued and at home in our facility. We could give each resident a card signed by staff for their birthday with a meal voucher or Switchbucks coupon in it, things of that nature. We could also have a profile photo for each resident, so we all know who is who (we currently have a folder on the staff computer with some resident photos for this purpose, but it is incomplete at best and management seems to struggle in making sure they have a photo of every resident to save on file for reference. I still frequently run into residents I don’t recognize or know anything about!). The weekly check-in meetings seem to have been successful so far and are a big step in the right direction.

## Progress and history tracking.

Considering the commonality and prevalence of issues like addiction and mental health conditions amongst our residents, it would be beneficial to their well-being to keep track of their progress on the issues from which they suffer as it relates to their progress. Having documented updates in their files would be instrumental in ensuring steady progress and improvement regarding things like their support meetings, encounters with case managers, observed behaviors, healthcare recommendations, and other statuses that warrant monitoring. If a resident has been depressed recently due to a death in the family, or feels afraid that they might relapse, or has just earned their 90-day sobriety chip, these are setbacks and milestones that we can help them with as their community—but only if we know about them. Being a harmonious, functional community is only possible with good communication and keeping staff apprised of how our residents are doing in every way.

## The Possibilities

* **Recommendation #1:** Adopt a property management software system.
	+ So far in the course of my research, the best fit for our needs would be Innago. It is free and has many useful features, including free training videos that can be used to familiarize staff members with the new system.
	+ Inputting the existing resident information would be the major adjustment. I would be more than happy to volunteer for this responsibility if this plan were to be put into motion. This would involve collecting missing information (we do not have some information for certain tenants, such as their birthdays, pictures, emergency contact info, etc.) and entering the data that we do have from the spreadsheets, past log sheets, and other files.
* **Recommendation #2:** Improve communication and documentation.
	+ Ideally when resident-specific updates are sent to the employee chat, they will be entered as a note on their resident file in the Innago software as well. It may also be worth looking into another messaging platform with more features rather than using Slack, such as ProofHub, which has far more diverse and customizable tools. The features offered by some other platforms would greatly improve many aspects of organizing and streamlining communication between employees.
	+ Communication is sorely lacking in several areas. Pertinent (sometimes even dangerous or urgent) things are frequently not added to the daily logs, the case managers are rarely in much contact with desk staff, and grave staff are basically strangers to everyone else! Regular in-person meetings may not be a solution given that everyone’s schedule is so different and difficult to coordinate, but everyone needs to be more mindful of sharing information and we need to find a way to check in more regularly as an organization, with *everyone*.
	+ There are often events and resources that residents have no knowledge of, due to lack of advertising. We should prioritize making flyers and spreading information about these things. For example, a field trip was recently cancelled because no one knew it was happening so only 2 people signed up (both of which were very sad about its cancellation!) It was rescheduled and I made flyers for the second date, for which 15 people signed up! Additionally, there is a resident who volunteers with a case manager to provide technical assistance and computer skills learning once per month, but no one ever shows up because it has not been advertised to residents, despite being a resource that a huge number of them have asked for.

# Proposal

This proposal has the unique benefit of requiring basically no resources beyond time. The proposed software (Innago) is free, as are its training materials, so all that is needed is time commitment from staff in order to learn to use the software and ensure that our chosen procedures pertaining to the software’s usage in our facility (which, again, I am more than happy to write and develop with approval and feedback from upper management; having workflows, checklists, and/or guide manuals for employees to use as they get familiar with the software’s tools and features would be beneficial and make the transition much smoother). A possible step-by-step plan for this transition to a property management system could be as follows:

* **Step 1:** Identify a small team of staff to be involved in the decisions and planning involved in the transition
* **Step 2:** Have team members become well-trained in the chosen software and its tools/features
* **Step 3:** Team members discuss and develop workflows, checklists, guide manuals in order to better assist the rest of employees in familiarizing themselves with the chosen procedures of using the software in regards to our unique situation and needs. We may also examine the possibility of drawing up an agreement for residents to sign, granting permission for us to store and/or share their information with other relevant agencies in order to connect them with resources, communicate with any applicable care teams, or any other necessary uses of such information in accordance with relevant laws such as HIPAA. Obtain approval of all created documents from upper management.
* **Step 4:** Team member(s) enter all existing resident information into the new system by drawing from existing logs, messages, and notes, creating tenant profiles for each and obtaining any necessary missing information
* **Step 5:** Team introduces software training materials (first to management, then to the rest of staff) and ensures that every employee completes the training. Also ensures that each employee is aware of and familiar with the developed company-specific materials from step 3.

A separate proposal would be necessary if there is interest in transitioning to another employee chat platform, as a workflow/plan would need to be developed in order to utilize the desired and/or selected features available. For example, if we prioritize a platform that offers document storage, project management, calendars, or forms, we would need to develop procedures specific to our desired utilization of that tool and what we would be using it for. (Ironically, ProofHub even offers a workflow feature.) A better organized messaging platform with such features would be a big supporting factor to the property management software.

# Expected Results

## Benefits of property management software

* More organized, navigable, readily available resident information in order to better and more readily offer them personalized assistance and support; also have such information readily available in order to connect them to other beneficial resources
* More effective and organized method of recording updates, incidents, and other pertinent notes; having the ability to further personalize notes and observations toward the benefit of the resident’s monitored well-being
* Easily find necessary documents such as lease agreements, contracts, or behavior plans in the event that they are needed for legal, medical, or financial purposes
* Track resident progress more closely, in order to better help them improve or assist them in times of crisis
* Streamline maintenance work orders to be queued and completed in an orderly, easily navigable fashion, and have neat, detailed records of work completed on specific units
* Have tenant history in easily accessible place in order to evaluate status and frequency of violations, late payments, or any unmet needs
* Be able to demonstrate our duties, actions, impact, and progress to donors or stakeholders via reports and examples of our meticulous and thorough recordkeeping
* Offer online or automatic rent payment options
* Clearer and more reliable records of rent payments
* Allows residents to have their own tenant accounts with which to communicate with us, send maintenance requests, track and control payments, see their account history, etc.
* Reduces likelihood of staff running into situations where they are unable to help residents or complete important tasks due to missing information

# conclusion

We are only able to offer our absolute best assistance and support to our residents if we ourselves have put into place systems of organization in order to be able to readily access and use the information and resources at our disposal, so our most fundamental boxes are checked as a smoothly functioning company. If employees are confused and stressed because they are unable to find information or documents they need, they are unlikely to be able to be at their best for our residents, much less offer the assistance the residents need if the necessary tools are not available to us. Having a clear, organized database with each resident’s information easily accessible in their file would benefit everyone involved. It would allow us to know the residents’ backgrounds and stay up to date with their progress in order to know them better, to understand them and their needs, therefore better equipping us to help and support them in getting what they need and achieving their goals. The potential of our abilities increases greatly once this obstacle to smooth access of information is removed, and the possibilities are endless.

Thank you for your consideration,

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