

In Form Database



Background information

In-Form is a complete client relationship, case and service management system for homelessness, housing support and other organisations working with vulnerable people. It enables services to build stronger relationships with clients and improve the productivity of their services. It's simple to use, and packed with features to help them assess, manage, collaborate and improve.

In-Form Essential is a great solution for homelessness services funded by the Lloyds Bank Foundation. It gives charities funded by the Foundation access to the industry-standard online client recording system used by many of the largest and most successful homelessness services in the country. In-Form is also used by organisations working with refugees, families, young offenders, women in prison, people with addiction and mental health issues and women experiencing domestic violence.

As well as enabling the highest standard of client data collection, reporting and outcomes monitoring, this platform will also allow for standard reports to be generated for the client and Lloyds Bank Foundation at the touch of a button.

As In-Form is cloud-based, charities will not need any additional IT hardware or software investment as In-Form is accessible from any web browser on a desktop PC, tablet or smartphone. In-Form is built on the Salesforce.com platform which is widely used in the commercial, not for profit and education sectors. The platform is GDPR compliant and data is held securely. Charities will be supported by Homeless Link, the national membership charity for homelessness and housing support agencies in England.

The offer under Enhance

Roots HR will provide HR support through 2 core packages. Both packages are In-Form Essential comes out of the box with all the features charities need to record and report information about their clients and the support they provide. It includes client profiles, casework, the Homelessness Outcomes Star, needs and risk assessment forms, incidents, bedspace and void management, referral tracking and much more. Designed by Homeless Link it has been tried and tested by many organisations in the sector and by Foundation grantees since December 2015. In-Form Essential includes the following modules:

Client recording	✓
Projects and services recording	✓
Casework actions	✓
Needs assessment and goals	✓
Homelessness Outcomes Star	✓
Risk Assessments	✓
Client alerts/red flags	✓
Community sentences	✓
Support agencies and agency contacts	✓

Income and benefits	✓
Voter registration recording	✓
Recording of attendance for groups of clients eg drop-ins, training, house meetings	✓
Complaints, compliments, incidents and accidents	✓
Salesforce Platform	
Web-based - access from any browser	✓
Reports	✓
Dashboards	✓
99.99% availability and high standards of data security	✓
Mobile access from smart phones and tablets	✓
Chatter (Facebook/Twitter type application for team collaboration and document sharing)	✓
Daily data back ups	✓
Document attachment to any record	✓

How do I know if this provider is right for my charity?

The In-Form database is applicable where the charity:

- Had /or had an existing database that is no longer fit for purpose
- has to provide information for their local authority and other funders and is struggling to do this effectively
- is based on more than one site or has several different services on one site
- wants to develop and plan for expansion and be more efficient
- is currently using spreadsheets, Word documents and paper to record their work

NB: it helps if the charity.....

- has staff who have experience of using the internet
- has enough laptops/computers with good internet access for staff
- has a motivated manager who is interested in IT and information and can see the benefits of an effective case management system

Feedback from a charity which has implemented the In-Form database via Enhance:

“Thank you so much for coming to Doorway yesterday. As you could tell, the team are really engaged and enthusiastic about using In-Form and everyone enjoyed the day.”

Input needed from you

- Time for one or two lead contacts to liaise with Homeless Link about their client information and reporting requirements. Their time is also needed for arrangements for training and ongoing support needs eg contacting

Homeless Link if they want to make changes to the database, add new users. It is also helpful if they can attend In-Form user group meetings and the annual conference in London.

- The charity should provide the training venue and lunch.
- Staff time in attending the training sessions
- The licence cost in subsequent years will need to be met by the charity. £120 plus VAT per annum per member of staff to continue to use In-Form
- Motivation of staff and preparation for change in business processes
- Contingency budget if they want Homeless Link to import existing data
- Contingency budget if they want to make changes to the system once implemented

Common issues encountered when accessing the database

- Lead staff very busy on managing their organisation, bidding for new contracts etc. so short on time to focus on implementing the database, contacting Homeless Link and motivating staff to adopt the new system
- Staff reluctant to make shift away from using their old spreadsheets and systems, and to change how they work
- Staff with limited experience in using the internet
- Limited access to laptops/pcs