

# In-Form

By Homeless Link

## Background

In-Form [in-form.org.uk](https://in-form.org.uk) is a case management system used by charities to manage all aspects of their work. It's been developed for use by organisations working with homeless people, those in need of housing support, and other vulnerable groups. It helps these organisations to build stronger relationships with their clients, and to improve the quality of their services. The system is simple to use, and comes with a wide range of features designed to help organisations deliver the best possible support to their clients.

"In-Form has been great from beginning to end, I've found them flexible, supportive and responsive. The system is easy to use and meets our needs, and 95% of staff are confident with the system. I would advise anyone who is considering In-Form to go for it."

## In-Form Essential

In-Form Essential gives charities funded by the Lloyds Bank Foundation access to an industry-standard, secure, online client recording system. It helps them to get the most out of their data, so they can collect information, create reports, and monitor client cases quickly, accurately and efficiently.

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 In-Form is cloud-based, it can be accessed from any web browser or via smartphone and tablets. This means there's no need for big investment in extra hardware or software. It's 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 stores data securely. Charities who use In-Form will be supported by a 30-strong team at Homeless Link, the national membership charity for homelessness and housing support agencies in England.

'In-Form Essential has helped us capture and articulate the impact of our service much more effectively, which in turn motivates staff and helps with funding applications or monitoring'.

## The core offer under Enhance

In-Form Essential comes with all the features charities need to record and report information about their clients, and the support and services they provide.

It includes powerful tools to record client profiles and casework, needs and risk assessment forms, safeguarding, incident reports, management of bed spaces, referral tracking, and much more. It has been developed to help to assess clients' needs, and to give feedback on any given

project's impact. Plus, staff can communicate quickly and easily and get the latest updates all within In-Form. These are just a few of the many features that make In-Form a great resource for organisations and their clients.

In-Form Essential was designed by Homeless Link and since December 2015 it has been tried, tested and proven through use by 230+ organisations in the sector, including recipients of Foundation grants.

## When is In-Form the best choice for a charity?

The In-Form system is of particular value when a charity wants:

- to improve outdated systems and processes; especially if it is currently using spreadsheets, Word, or paper to record its work, or if it needs to consolidate information from a number of different teams or sites.
- a more effective way to demonstrate their impact and provide information for their local authority and other funders
- to develop or expand its organisation
- a sector-leading system with low ongoing licence costs

## What do charities need to do?

Homeless Link will help charities set up the system to their specification, and will provide training and up to 10 free licences for the first year. Charities who want to take advantage of In-Form need to provide a lead to work with the team to design the system, collate changes and organise online or face to face training (when possible). Crucially, it's also important to make sure that staff are informed and ready for the change-over. The system is tailored to meet the needs of individual organisations so it's important that new users engage as much as possible with the new system – by attending user group meetings, or the annual conference – to make sure that they are getting as much benefit as possible from In-Form.

Please contact [Inform.sales@homelesslink.org.uk](mailto:Inform.sales@homelesslink.org.uk) for more information or go to [in-form.org.uk](http://in-form.org.uk)

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