

## Success Story

# Empowering Nonprofits: Faster Housing Allocation Program Management Through Salesforce Automation

## Objective

A US-based technology partner for nonprofit organizations delivers business and technology solutions that empower nonprofit partner agencies to enhance operational efficiency and community impact. One of their partner agencies faced challenges with disconnected systems, manual processes, and inefficiencies in managing housing programs. To address these gaps, they approached Exavalu for expert advisory and implementation services. Their goal was to streamline participant intake, improve data interoperability, and drive automation for key processes such as grant management, housing allocations, and program exits.

## Services Offered

- Advisory
- Implementation

## Challenges

A network of partner agencies struggled with disconnected systems, leading to **inefficient data sharing and manual client intake processes**. The lack of a **standardized digital platform** made it difficult to manage **grants, funds, budgets, and housing allocations**. Additionally, agencies faced challenges in **tracking evictions, automating program exits, and conducting duplicate checks across systems**. Seamless **data integration with HMIS (Homeless Management Information System)** was critical to improving efficiency and ensuring accurate reporting.

Partner agencies faced inefficiencies due to disconnected systems and a lack of a standardized model for data sharing. Their reliance on manual processing for client intake and various administrative tasks led to lower operational efficiency. To address these gaps, they needed a comprehensive digital platform that could enhance overall efficiency and introduce new capabilities.

Their key requirements included streamlined grant management, funding, budgeting, and fundraising management, improved tracking of housing allocations and evictions, and advanced straight-through processing for program exits and status updates. Additionally, the solution needed to support a revamped intake process for enrolling families, ensure duplicate checks across partner agencies, and integrate seamlessly with the Homeless Management Information System (HMIS) for better data interoperability.

## How Exavalu Created Value

## Our Methodology and Approach

To streamline eligibility determination and participant intake for housing programs, we developed a **managed package** tailored to support homeless service organizations across cities and suburbs in the U.S. The solution leveraged **Salesforce's Nonprofit Success Pack (NPSP) and Program Management Module (PMM)** to enhance fundraising, grant management, budgeting, and tracking of housing allocations and evictions.

To improve operational efficiency, we enabled **Straight-Through Processing (STP)** using Salesforce automation, eliminating manual intervention in program exits and partner agency status updates. Additionally, we ensured seamless data interoperability by **integrating partner agency platforms with Snowflake using StreamSets**, creating a connected ecosystem for real-time data sharing and organizational decision-making.

## Organizational Impact

- 1 Automated processes enabled faster turnaround times, minimized manual errors, and reduced human resource involvement - resulting in significant cost savings.
- 2 Providers were able to identify families already enrolled, preventing duplication and ensuring efficient resource allocation.
- 3 Configurable FPL guidelines enabled a simplified and accurate enrollment process, ensuring eligible families receive support seamlessly.
- 4 Enhanced reporting and analytics empowered agencies with actionable insights for better organizational decision-making.
- 5 Improved efficiency and productivity through automation and integration, allowing teams to focus on high-value tasks.

## Metrics

- 15 Partner Agencies Integrated
- 4000+ Families Integrated into the Program
- ~30% Reduction in Manual Processing Time
- 45% Faster Program Enrollment