**Santa Cruz County Health Services Agency
Public Health Division**

Using Salesforce to Forecast Funding Streams and Manage Agreements

Santa Cruz County Public Health and Summit Technologies LLC
County Health Executives Association of California (CHEAC) Annual Meeting
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Project Goals

- Improve infrastructure to respond to future threats
- Lower costs to increase outputs
- Make better decisions

Presenters

Megan Holland

Administrative Services Manager

Santa Cruz County Public Health Division

Joel Ginsberg

Senior Departmental Administrative Analyst

Santa Cruz County Public Health Division

Brian Stevenson

Principal Salesforce Architect

Summit Technologies LLC

Santa Cruz County Public Health
County population: 271k
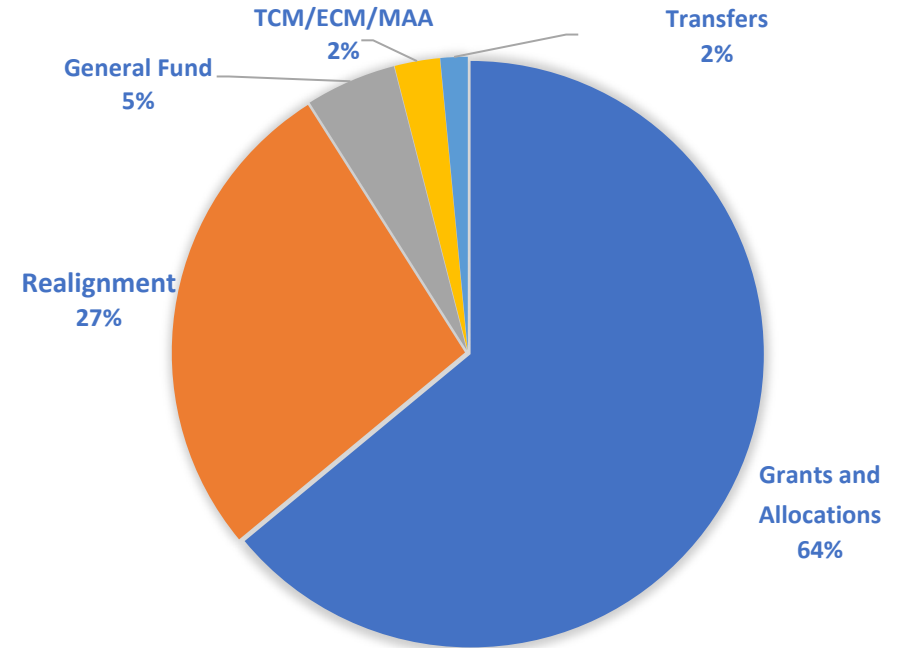140 employees
Annual budget $16.7m pre-COVID
$34m FY23-24

Summit Technologies
16 consultants
190 clients, 500 projects
5-Star Rating on Salesforce AppExchange

What's one challenge you have managing agreements or predicting the spend-down of grants?

Challenge: Complex funding streams …

… and an accounting system that doesn't track to grant budgets

- Spending reports always in arrears
- No easy way to connect expenses to approved budgets
- No easy way to project burn rates

Challenge: A blizzard of duplicated data flowing through forms, spreadsheets, and workflows

Forms, forms, forms!

Tracking spreadsheets

Rules and workflows
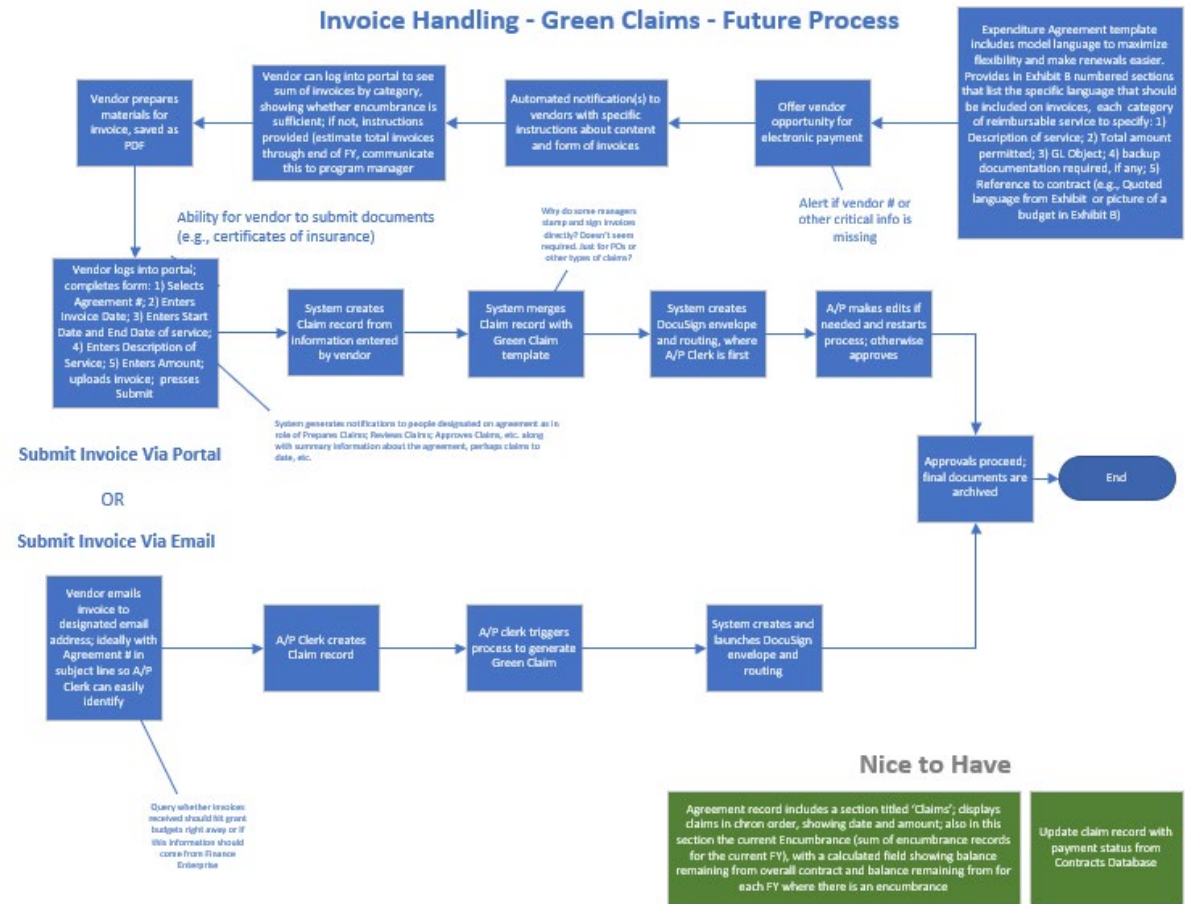
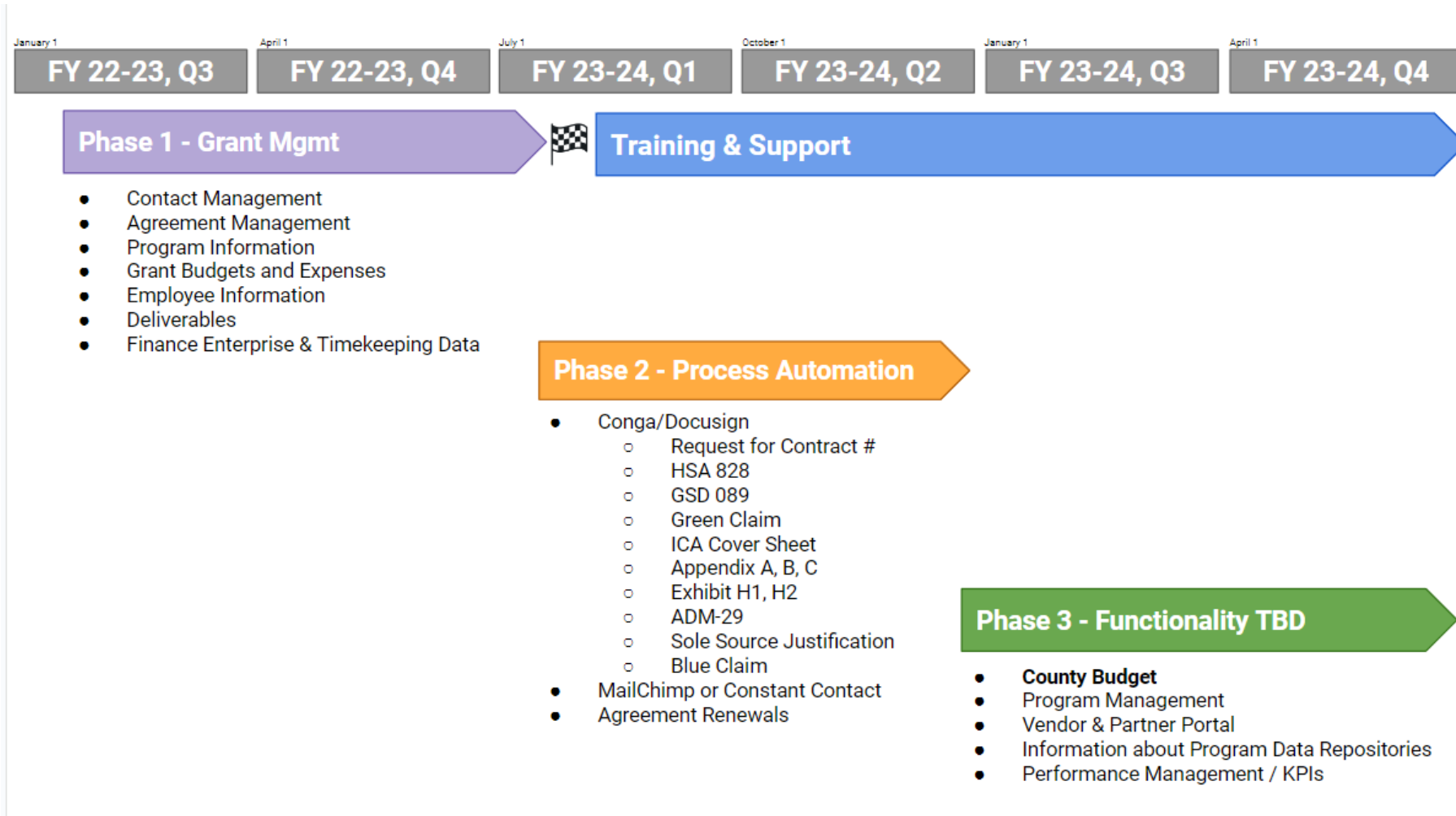# Response to Challenge: Tie it all together

Project Approach

- See an opportunity
- Prioritize functionality
- Redesign business processes
- Create "data dictionary" of needed fields
- Create a vision and build support
- Select software and a vendor
- Design, revise, test
- Soft launch

Invoice Handling - Green Claims - Future Process

Implementation Roadmap

January 1	April 1	July 1	October 1	January 1	April 1
FY 22-23, Q3	FY 22-23, Q4	FY 23-24, Q1	FY 23-24, Q2	FY 23-24, Q3	FY 23-24, Q4

Phase 1 - Grant Mgmt 🏁 **Training & Support**

- Contact Management
- Agreement Management
- Program Information
- Grant Budgets and Expenses
- Employee Information
- Deliverables
- Finance Enterprise & Timekeeping Data

Phase 2 - Process Automation

- Conga/Docusign
  - Request for Contract #
  - HSA 828
  - GSD 089
  - Green Claim
  - ICA Cover Sheet
  - Appendix A, B, C
  - Exhibit H1, H2
  - ADM-29
  - Sole Source Justification
  - Blue Claim
- MailChimp or Constant Contact
- Agreement Renewals

Phase 3 - Functionality TBD

- **County Budget**
- Program Management
- Vendor & Partner Portal
- Information about Program Data Repositories
- Performance Management / KPIs

Demonstration

Overall Data Strategy

We are also working with **Intrepid Ascent** to:
- Inventory our data repositories (86 so far!)
- Configure Power BI to reference Salesforce and internal repositories to visualize/dashboard data
- Create internal and public-facing dashboards, such as:
  - Program 360^0
    - Description
    - All available metrics
    - All revenues
    - All expenses
    - All staff
    - All partners
  - Hiring pipeline
  - Dashboards to support program planning
  - Dashboards to measure program impact
- We are also piloting Clear Impact for RBA

Santa Cruz Public Health Data Infrastructure Future State
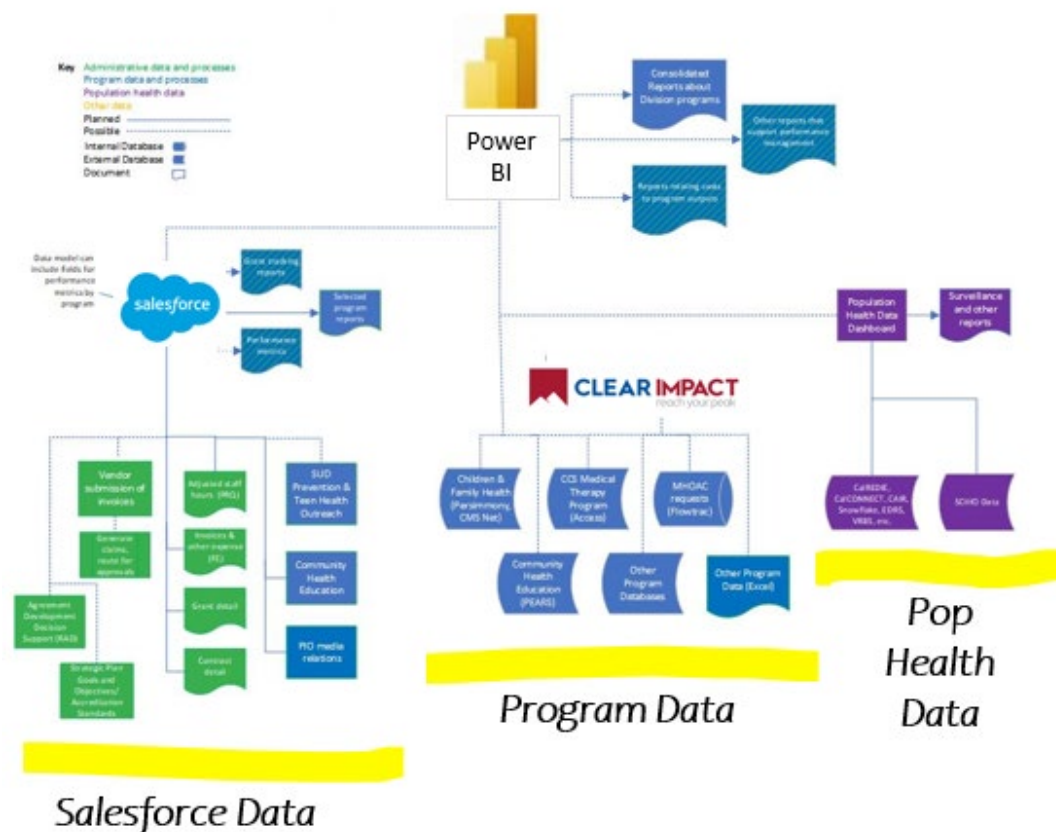
Looking to the Future

We're already learning useful things:

- We've been underestimating the benefits rate in our spend plans: (actuals are 53% versus our assumption of 48%)
- Revealed that some contracts burning through funds faster than expected, raising risk of depleting funds too early
- Actual staff time was 5-10% lower than projection

Public Health funding has shifted dramatically in recent years. Future budgets are likely to be more challenging.

This tool is designed to help us manage our funding streams and agreements more nimbly and at lower cost. We hope we have created a sophisticated and feature-rich tool that is intuitive and usable with minimal training.

Strong Administration ➔ Improved Outcomes

Questions and Discussion

We are happy to share! If you would like more information about Santa Cruz County Public Health's Salesforce implementation, please contact:

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