



Serving the Underserved:

2-1-1 San Diego Builds Bridges of Caring with Informatica



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CTO
2-1-1 San Diego

Goals

Provide clients with faster access to the social services they need

Improve phone call efficiency when interacting with clients

Enhance visibility for partners when providing community services

Solution

Establish a Community Information Exchange (CIE) for comprehensive community services

Aggregate data from Salesforce for enhanced efficiency

Leverage Informatica Intelligent Cloud Services for rapid service delivery

Results

Improves service outcomes for more than 100,000 people, with the potential to grow beyond 1 million

Enables tracking of outcomes and better coordination between agencies

Reduces average call time and cost to serve each caller

Business Requirements:

- Ingest data from 1,200 different partners in a variety of formats
- Create a single golden record for each caller and partner

About 2-1-1 San Diego

2-1-1 San Diego is a resource and information hub that connects people with community, health, and disaster services through a free, 24/7 stigma-free confidential phone service and searchable online database.

Everyone knows about 9-1-1 for emergency services in the United States, but a lesser known resource has been gaining momentum for nearly two decades. In 2000, the Federal Communications Commission (FCC) reserved 2-1-1 as a universal dialing code for community information and referral services. Since then, 2-1-1 organizations have sprung up in all 50 states, helping individuals and families connect with the most appropriate and closest resources in their community to get the assistance they need.

Like many communities across the U.S., San Diego offers a wealth of social services, but they can be difficult, intimidating, and stigmatizing for many people to navigate successfully. 2-1-1 San Diego answers more than 600,000 confidential calls per year, helping a county with a large military population and 3.3 million permanent residents navigate more than 6,000 health and human service programs.

After explaining their needs, callers are referred to one or more of approximately 1,200 affiliate agencies and partners, including Courage to Call, a veteran run, peer-to-peer support program. If there are language barriers or the caller has difficulty supplying required information, assistance is provided—helping people find food, shelter, utility services assistance, counseling, or health services.

Until recently, 2-1-1 San Diego shared very little information with partners. Callers had to repeat their information and case details with each call, which took time and negatively impacted the caller experience. It was clear that with so many individuals relying on different services, it was important to understand which agency was serving which individual—and connect the records from the partners—in order to make the right recommendations. The organization also lacked visibility into outcomes or effectiveness—once referred, there was no way to know if a caller had found the help they needed.

Unfortunately, this is the case with many 2-1-1 services across the country. Peter Battistel, Chief Technology Officer at 2-1-1 San Diego explains: “Often, social services aren’t as connected or efficient as they should be. We get a lot of repeat callers, and multiple agencies often serve the same individuals. In San Diego, we saw that the community was yearning for a way to consolidate caller and service provider information in one place.”

Creating a shareable record

Upon receiving funding from the Veterans Transportation and Community Living Initiative, Molina Healthcare, and the Alliance Healthcare Foundation, as well as using significant internal funding, 2-1-1 San Diego decided to rebuild its Community Information Exchange (CIE). This would create a single, trusted view of partners and agencies across the county. This system provides actionable data through comprehensive assessments, a risk rating tool, community case planning, and better connections to services addressing the social determinants of health. If callers opt in to CIE, their record can be securely shared among partner organizations with their 2-1-1 call history and life events.



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With such a large number of partners across the community, 2-1-1 San Diego must ingest a wide variety of data from diverse sources, including spreadsheets and home-grown Customer Relationship Management (CRM) systems. For CIE to be a viable option that partners would want to adopt, the organization needed to complement its Salesforce CRM platform with cloud data integration and Master Data Management (MDM) for accessible, trusted data. 2-1-1 San Diego needed real-time integration, compliance with HIPAA and other regulations to protect sensitive information, and a solution that would be easy to scale and maintain.

“We went through a design-and-plan session with Salesforce, and it became clear that we needed some middleware to accomplish our goals,” says Battistel. “Our Salesforce consultants wrote a very clear set of requirements for cloud data integration and MDM, and Informatica checked every single box. I can’t say the same for the other solutions we considered.”

Working with Informatica Professional Services, the organization used Informatica Intelligent Cloud Services to bring data from numerous agencies into Salesforce. Informatica Cloud MDM—Customer 360 for Salesforce eradicates duplicate, inaccurate, and incomplete records, providing a more comprehensive and accurate view of callers and partners.

“Informatica was extremely helpful as we worked to improve our Community Information Exchange—offering attractive pricing befitting our nonprofit status and training our engineer until he was completely self-sufficient,” says Battistel.

Providing anticipatory care

Just seven months after launching the CIE, 2-1-1 San Diego surpassed 100,000 unique people in the CIE database. Approximately one-third opted in to information sharing within the CIE network. The organization is working to help callers understand that with a shared record, they can avoid the potentially traumatizing or humiliating experience of having to retell their story repeatedly, and that providers can make anticipatory recommendations for services and care, which will improve their lives. For example, by exchanging data with partners in real time during a call, 2-1-1 San Diego is helping veterans and other callers request transportation on demand, which is often required for them to access other needed services.

“The impact we’re making with Informatica and Salesforce is profound,” says Battistel. “Call times are going down, and we’re getting fewer repeat calls from individuals for the same incident. We’re better able to direct clients to the right resources because we have more information up front, and our partners can be more proactive because they know what to expect when we send them a referral.”



Inside The Solution:

- Informatica Intelligent Cloud Services
- Informatica Cloud MDM - Customer 360 for Salesforce



Looking deeper into outcomes

With CIE, 2-1-1 San Diego is gathering comprehensive data about the individuals it serves, providing richer insights into community trends on a large scale, which can help guide policy and advocacy—ensuring resources are used where they are needed most. Community planners can use this information to address local challenges and advocate for change, while social and medical service providers can write grants to help finance additional services. Armed with context and detailed case histories, agencies can make informed decisions and more easily connect their clients to other medical and social services.

“By using Informatica for integrated data quality, we’re better able to see the larger stories that our data tells and work with our partners to create happier, healthier communities,” says Battistel.

Breaking down barriers to access

With trusted and secure data, 2-1-1 San Diego is breaking down service silos, improving access, and reducing the cost to serve each caller. In the coming years, it expects the CIE database to grow to 1.5 million people, or approximately 45 percent of the county’s population.

“Informatica and Salesforce have given us a means to connect our partners across San Diego County with trusted data, potentially enabling better outcomes for more than a million people,” says Battistel. “By integrating and mastering our data, we’re able to get our callers access to the right resource the first time and increase the level of service we provide.”