

**Olivia's Place** is committed to supporting families through the highs and lows of pregnancy and early parenting. Part of their service is to provide material aid, such as cots and children's car seats, either directly through Olivia's Place family support workers or via external caseworkers.

**Project length** 3 months  
**Completed** September 2023

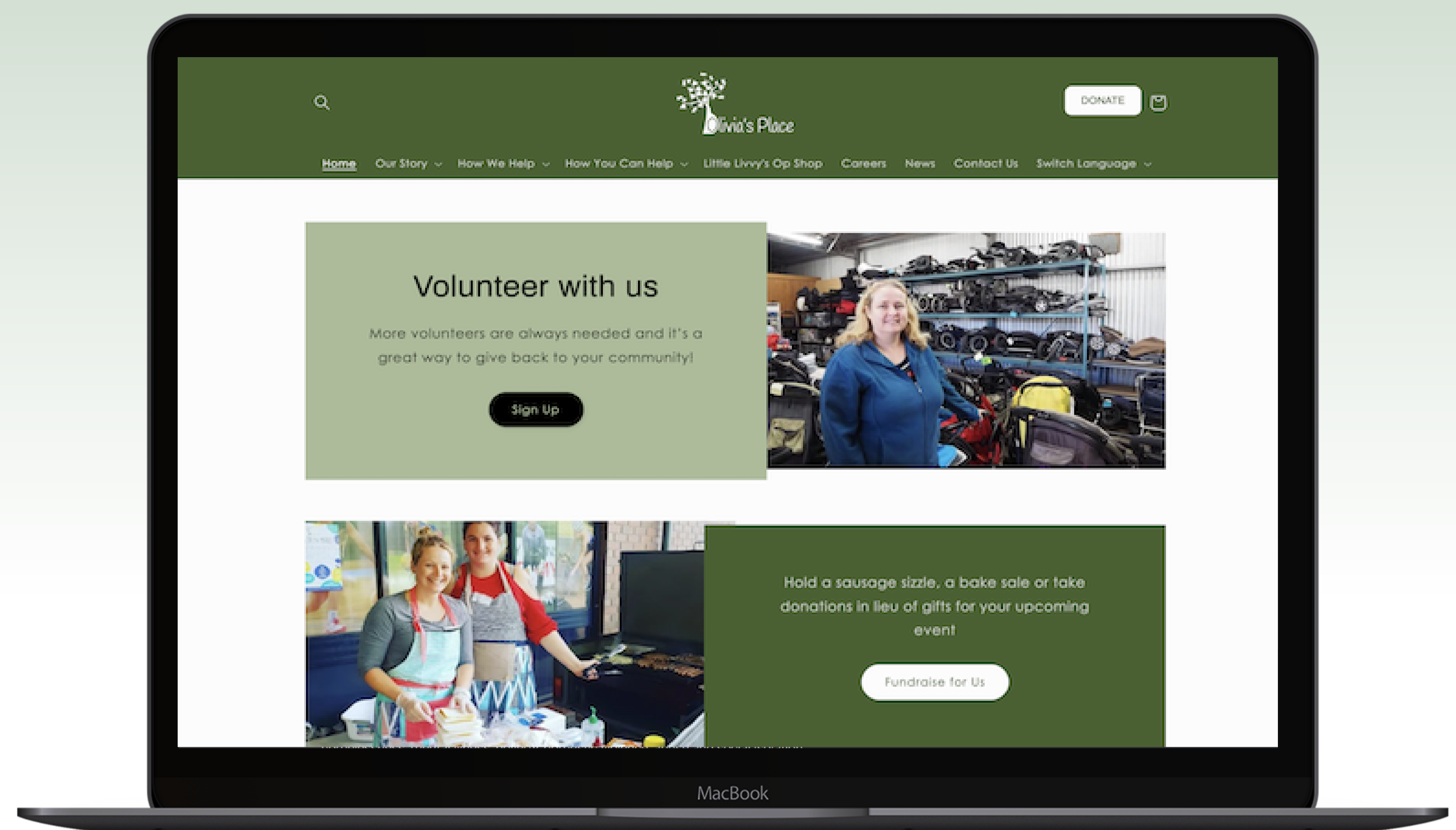


The new improvements mean that our daily admin will be greatly reduced and we have gained so many more useful features to help manage our stock and material aid.

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## Challenge

Olivia's Place faced several challenges in their material aid provision system. First the team had no administration rights over GoCanvas, a mobile app the team used to safety-check material aid distributed to families. This lack of control made training volunteers and maintaining consistency difficult. The app was also outdated.

Next, inefficient material aid record-keeping did not reflect the organisation's inventory, making it difficult to manage items they had on hand. Additionally, there was no way to record the volume of aid distributed or update the estimated value of the items.

Finally, tracking safety-checked items was a challenge, and therefore a risk. The task of locating records for items that had been safety-checked – in particular items that had been returned (for a variety of reasons) – was problematic. Maintaining accurate records of distributed, and returned, items is critical to the organisation's safety standards and reputation.

## Solution

FormAssembly replaced GoCanvas forms for safety checks. This gave Olivia's Place full control over their data, ensuring consistency and improving volunteer training. Automation was introduced to minimise manual data entry, resulting in a much more streamlined and efficient process.

New Salesforce custom objects, including Inventories and Reference Data, improved inventory management and reporting. Unique stock codes for items simplified record lookup, and the new system allowed Olivia's Place to effectively manage overall inventory, from safety checks to distribution and returns.

Finally, new reports and two main dashboards provide valuable insights into material aid distribution and account for all items, such as baby bundles, nappies, children's clothing, electrical items and all safety-checked equipment, as well as the total number, weight and value of distributed items.

## Benefits

### Enhanced Control

Olivia's Place now has full control over their data, reducing uncertainty and streamlining the training of volunteers. This approach enables data-driven decision making and more effective allocation of resources.

### Efficiency Gains

Automated processes and integrated forms have significantly improved efficiency, from data entry to tracking items.

### Improved Reporting

With comprehensive dashboards and reports, Olivia's Place can make better decisions and gain valuable insights into their material aid distribution, enhancing their ability to support families in need.