TRANSFORM YOUR CASE MANAGEMENT:

THE 3 KEY STEPS

The Unofficial Guide to Web-Based Case Management

Transfer Your Case Management: The 3 Key Steps

Can you improve your case management system?

It's a tough time for non-profits. You and your fellow staff care - a lot. And you work hard – really hard. But even with the tons of caring and professionalism, your system for managing cases leaves you feeling overwhelmed. You fully understand that more optimal case management is possible in theory, but you also know the kind of high-performance software that would help is not realistic given current budgetary constraints. You and your fellow staff will just have to keep doing the best you can to hold it all together for the people you serve.

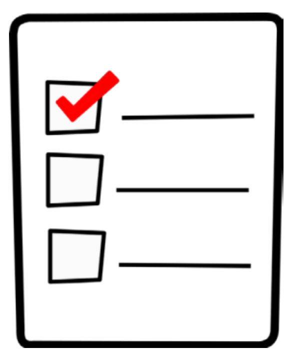
But is that really the only choice?

A different approach... what's possible?

If you want more control and efficiency built into your case management system but think your options are very limited, than this e-report is written for you. Sometimes the first step to a big change comes when you look at a problem from a different angle. Don't cut down your possibilities before you know what they actually are… don't narrow your choices for improving case management until you've fully explored what's possible.

Here's a checklist... how many of these are true about your organization?

Please read the checklist below… if you find yourself nodding in agreement to 2 or more of these statements, you need to fully read this report and consider taking action.



- ☐ Know that high-performance case management software would make a difference but can't afford it
- ☐ Staff reductions = caseworkers have a crushing load
- ☐ More clients entering your system = overwhelmed staff
- ☐ You have an old paper file and folder system that leads to mistakes and wasted time
- ☐ You use an outdated software system with no recent updates but can't afford to change
- ☐ Data that is crucial to share throughout your organization is not communicated efficiently
- ☐ You could increase funding opportunities and grant opportunities if you had better ways to capture and report data
- ☐ You spend too much time managing your system or training staff on how to use it and not enough time helping those you serve

How did it get to this point – the tough climate for those who help society's marginalized…

It is no secret that ever since the economy took a nosedive in 2008, agencies that serve families and children have seen significant increases in demand for their services. As the expectations and burdens have increased, funding has not kept pace. In fact, in many cases budgets have actually decreased.

For those on the frontlines helping others, this can lead to an overwhelming cycle. Caseworkers suffer from the pressures of having too many cases and too many records to keep track of. And mounting caseloads can lead to poor morale or even burnout.

Of course, those who can suffer the most from an overwhelmed system are those who can least afford it… the clients you serve. Two recent independent surveys from Michigan and New Jersey confirm that non-profits are being challenged as never before. In each survey more than 60% reported a significant increase in demand (in one survey it was as high as 73%). But half of the respondents report that they are unable to fully meet the demand for their service.

More staff… or more efficient?

So as demand increases, one solution is to add more staff. This will ease the burden on the current caseworkers and make sure that your clients are served adequately. The one problem with this solution is that it often is not realistic. The budget is just not there to add more staff.

Another solution is to get your staff to work harder. In the world of non-profits, this is also not realistic. You already have people working harder for less money than they would likely receive in the for-profit sector. And as your staff takes on more burdens, morale can dip making it even more difficult to in- crease performance.

There is one other solution… work smarter. Your entire organization can get the necessary tools to in- crease efficiency. Here is a key point about better tools and processes: they have a 'snowball' effect that improves performance and morale in all areas. This report is dedicated to the proposition that an affordable, case management software system is the quickest and best way to increase the quality of your services. Whether you're currently using a paper file and folder system or struggling with a software system that falls short, there are options that can get the job done for far less than you might expect.

Three simple steps to transforming your case management

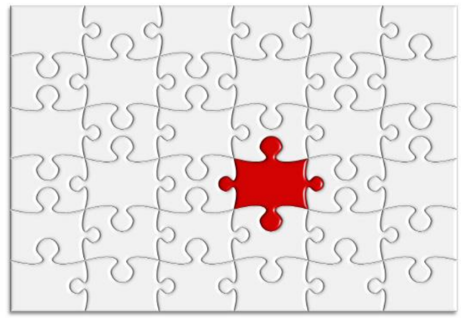
There are a lot of case management choices available. Because you manage so much to keep your non- profit running, taking time to sort through the best options can seem overwhelming. Global Vision Technologies has put together a simple three step process to remove the confusion.

You'll also find 2 worksheets at the end of this report that you can print and fill out to help you put these steps into practical action.

Step 1: Thoroughly Analyze Your Current Case Management Process

To make solid decisions on how to improve, you first need to get a clear picture of where your organization currently stands. What follows are areas of focus for optimizing case management.

(Note: the "Current Case Management Worksheet" at the back of this report contains questions for each area and has space for answers. It is recommended that you finish reading this report and then print and complete the worksheet).



FOCUS AREA 1: INTAKE PROCESS – For many non- profits, there are specific documents that absolutely MUST be completed before a prospective client can be assisted. What sys- tem do you currently have in place to standardize and track all the clients when they come to you for services?

Ask yourself whether your system is highly manual… heavy on handwritten forms and file folders. If it is, standardization can be a problem. Paper means that caseworkers and clients can often miss filling in crucial information, or do it incorrectly. More stringent auditing and training is sometimes necessary with paper systems to get everyone on the same page.

Paper systems also raise issues of tracking and access. With paper systems, if certain key forms are accidently skipped, there is often no easy way to catch the error. If multiple people need access to the original intake forms, manual systems are the least efficient and frustrating for your staff.

If you use a computer-based system, ask yourself how well it meshes with your intake process. Many non-profits struggle with older, legacy systems. These systems often provide no product updates and become more outdated each passing year. Often with older systems, technical support is minimal to non-existent. This can lead to significant frustrations for both caseworkers and clients during the intake process.

Another key area to analyze is the amount of time it takes to complete your intake process. To get a true picture, you should factor in time spent tracking down missing documents, computer downtime, and filing time. A good idea when analyzing is to sit down with your caseworkers and ask them what frustrates them about the intake process. A best practice is to ask them to be specific about what eats up their time as they on-board clients.

FOCUS AREA 2: WORKFLOW, REPORTING, and TRACKING – Do you have a typical process that the majority of your clients follow as they receive your services? Even if you don't have one you can call typical, it is likely you can think through some typical types of experiences in delivering services to your clients.

Once you sketch out some typical interactions, it is time to think through the 'touch-points' with your case management system. After the intake process, when typically is the next point where a caseworker will need to refer to (or add to) the clients file or documentation? It can be very helpful to outline each step specifically and look at the process and whether it is allowing you to serve your clients in the best way possible. The work-sheets at the end of this report will help you dig into the details.

One crucial area is how data about your clients moves with your organization's workflow. How many people in your organization typically access a single client's data? Do all the staff members who need access to complete client information actually get what they need simply and efficiently? Many organizations are plagued with problems involving sharing data. If you find that crucial information is trapped inside of different 'data silos', note this in your case management analysis.

For many non-profits, best outcomes are achieved by moving clients through their program on a specific timeline. Do you have a series of steps, tasks, assessments, or plan updates that need to be accomplished by a certain time to optimize outcomes for your clients? As you think through your current methods, it is important to think through how well your current tools allow you to adhere to a timeline.

Another area to analyze: the ability of your current case management system to track and report crucial information that keeps you out of legal or other difficulties. Unfortunately, everyone has heard of the tragedies that can occur when clients slip through the safety net provided by non-profit services. Excel- lent case management processes significantly lessen the chances of this occurring.

Worst-case scenarios aside, what are the costs of less than optimal case management for the day-to- day quality you deliver to all your clients? As you analyze your case management system, play devil's advocate and ask what is going wrong or could go wrong with how you currently manage cases. This is not always the most pleasant questions to put to your organization. But it is better to do it now. It will be much more painful to go through after a poor, or even disastrous, client outcome.

FOCUS AREA 3: TRAINING – For some organizations, the time and effort to get new staff com- petent and comfortable with handling case management documentation is a significant issue. Things to think about in this area include:

- Are you confident that all your caseworkers are proficient in managing documentation?
- How much time does it take to get caseworkers to understand the processes?
- Is the training your staff receives consistent?
- What system is in place to support staff as questions arise in case documentation?
- Any issues with turnover? If a key staff member leaves, how much 'thought capital' goes with them?

That covers the 3 main areas of focus, but it is a good idea to think of any other areas where your case management documentation could be stronger. For example, how much caseworker accountability is built into your case management process? Accountability for caseworkers can help you increase productivity and detail orientation.

Also, is it valuable for you to track referral information? For some non-profits that receive government referrals (state agencies, courts, etc.), this can be crucial. But even if you get referrals elsewhere, it can be very valuable to track where they are coming from. Ask yourself how well your current methods al- low for managing and tracking referrals.

Once you have worked through all this, you have completed step 1. Again, you are strongly encouraged to fill out the companion worksheets at the end of this report. Some organizations print out multiple copies of the worksheets and hold a staff meeting to go through it. This can uncover fresh angles and give you the best overall picture of case management strengths and weaknesses.

Step 2: Discover Your Ideal Solution

So Step 1 gave you a thorough understanding of where you are now. Step 2 is all about where you can go. There are two key aspects of this step. One, it is always important to keep in mind the end goal here… to better serve your clients! The other key is not to set self-imposed limits before executing this step. Some organizations assume ahead of time that certain technologies are automatically outside their reach because it will be beyond their budget.

Now, of course, the budget will eventually enter into any decision made. But this step is about the ideal solution for your organization, so you should avoid limiting yourself right from the start.

Here are some questions and thoughts to help you:

Standardization. Would a standardized formatting for all or some of your forms and documents improve your process? A software solution can provide a powerful and efficient way to make sure that all forms are filled out consistently and that no required information is omitted. It is important to think through how this could best work for your organization. Again, this is a good place to 'think big.' What kind of task checklists, system alerts, timeline notifications, etc. would help you best serve your clients?

Scalability. This is a two-part consideration. One is to figure out what you currently need and make sure that your solution will only charge you for what you actually need. And the second part is to find a system that can scale up and down as your need fluctuates. Scalability is all about agility and the power of flexibility.

Collaboration and Access. What would be ideal in terms of access to case management files for your non-profit? This is a key area to focus on. Some organizations have lived so long with data being trapped in different containers that are hard to access, they have trouble imagining the morale boost and service efficiencies that can come with crucial data being available easily to those who are authorized to view it.

Many organizations have found ways to greatly increase collaboration through more robust access to client case management. This step is the time to brainstorm ways that your own collaboration could improve with a better system.

Security. How secure do you need your clients' case files to be? For virtually everyone, this is an easy answer: VERY SECURE. The key here is how to have the access to data that gives the best client out- comes without sacrificing any of your clients' privacy or security. A sometimes overlooked aspect of security is that some staff don't need access to every part of a client file. Giving them access to just what they need is a good way to keep them focused on their role.

Personalization. Here is an area where you need to think through what is unique to your services and what an ideal case management system would be able to do for you. What data fields do you need for what documents? If you had software that used 'drop down' menu choices, what would those choices be? Another good question to ask is how 'extractable' you would like data to be. If data is buried in the general text of a document, it can be very difficult to quantify and analyze.

If data is entered in a specific field, it can be extremely simple to aggregate and examine.

Workflow. This follows right on the heels of personalization. What case management streamlining would bring out the best outcomes for your clients? And what would this streamlining do to help your case managers be as productive as possible? Consider what work flow aids could improve your overall performance. Think about referral, intake, program enrollment, case notes, assessments… anything that is a crucial step in your processes and how it would look with a case management system that was the right fit.

Modules and Dashboard. Do you have certain areas where being handed a well-organized, easy- to-use solution would be a relief? In other words, a turn-key solution that takes the pressure off you. Maybe a module to handle billing or grant management? Think also of training management. Perhaps a module that could deliver training in a consistent and efficient way could free up other resources. There are a lot of options available so think what areas that need the most help. Also, what kind of information would be most helpful to your caseworkers in staying on top of their cases? If they logged into a main screen (or 'dashboard'), what alerts, notifications, reminders, etc. would be most helpful in keeping track of their clients?

Measuring Outcomes. This can be a very powerful tool for non-profits. There are affordable soft- ware options that provide the ability to slice and collate data in very dynamic and effective ways. The reporting tools now available can measure progress, note areas where your organization is weak, and track outcomes. The incredible potency of data management and reporting tools allows you to spot troubling trends very fast and design a response. These type of solutions are simply not possible with paper and file systems or out-dated software systems.

Increased Funding Opportunities. Many times grant applica- tions and other important sources of funding hinge upon being able to precisely measure and report data and outcomes. What data and report capabilities would improve your chances to obtain more funding?

Support. What kind of outside support would be ideal for your case management system? If you are using a software system currently, do you have staff to deal with hardware and software issues as they arise? What would initial training on any new system look like… again, ide- ally? Another key consideration is how your staff best learns something. Would an online training course work best or on-site training? Would they prefer manuals or video training?

The above list is a comprehensive look at what any non-profit should consider when thinking about a case management system. Completing the worksheets at the end of this report will allow you to ex- plore the right solution in a comprehensive fashion.

So you've figured out where you are now. And you've started to get a pretty good handle on what a good solution would look like. But now what? How do you turn all this analysis into action?

Step 3: Find an Expert to Guide You to a Concrete Solution (And Don't Pay For It!)

Okay, if you've read this far, chances are that one of these three applies to you:

- You are on a paper and file system only, but want something better
- You have an older software system that has become less than ideal
- You have a newer software system that is cumbersome or plagued by technical problems

Whichever applies to your non-profit, the underlying problem is the same in each case. You have something that is not working for you, is eroding staff morale, and is delivering less than your clients deserve. You've done the hard work of thinking through what you need. Now you need to invite in an expert to demonstrate possible solutions.

Global Vision Technologies has developed a unique consulting program that allows non-profits to explore case management software solutions in an environment free from pressure sales presentations. The "GVT Case Management System Assessment" is your opportunity to get your case management software questions answered without feeling obligated or pressured. We do not charge for this consulting session.

Once you've completed the worksheets at the end of this report, you've actually taken the first step in the assessment process. Although we don't require these be completed to receive your complimentary assessment, we find that the non-profits who complete them get the most out of a "GVT Case Management System Assessment." When our consultants have your worksheet answers prior to meeting with you, they can make sure all your questions and concerns are addressed.

Now, don't get us wrong. Global Vision Technologies does have an excellent case management system and we love to demonstrate how it has worked wonders for many non-profits. We've had many non- profits smoothly transition from a paper file system to our system. We've also helped many switch from a software system that was falling short. Our solution is called "FAMCare: Rapid Case Management." Is it the perfect solution for your organization? We can't give a complete and honest answer to that question without meeting with you and delivering a full assessment.

But we can provide you some information right here that will give you a basic idea of what FAMCare delivers and who has been successful with it.

FAMCare is:

Proven: Our first FAMCare system was launched 13 years ago and over the years we've worked with hundreds of directors, administrators, and caseworkers to refine it into a practical system that delivers results.

Affordable: One of the biggest barriers to high-performance software is price. With our unique, cloud-based technology, we've made the kind of quality system that used to be only available to the biggest non-profits realistic for small to medium- sized organizations. (We have a lot of clients that are 5-20 person shops. Our system is flexible enough to handle that or scale up to handle much larger non-profits).

Personalized: We mean this both literally and figuratively. Literally, our innovations now allow for programs to be customized to meet specific needs. But we also mean that we provide the type of personal support and training… no user of FAMCare is ever "just another account." We have added a page later in this report so you can hear what others say about us in their own words.

Completely Scalable: FAMCare works for an extraordinary range of organizations. We work for the non-profit that has a staff of 5, but we also work county and state governments… and everything in between. The unique thing about a scalable solution is that you pay for only what you need. This allows the system to be affordable for just about any organization.

What about the specific benefits of FAMCare: Rapid Case Management?

- Data is secure and backed-up regularly
- Data is more visible and available
- World-class reporting tools and data management
- Client focus improves because hardware and software are not your headache
- Streamlined case management and strong workflow
- Available from anywhere with internet connection
- Point and click interface is extremely easy to learn and use

YOU CAN DO THIS… case management improvement is both do-able and affordable no matter the size of your non-profit.

Here is what to do now to get started:

2. Complete the worksheets: Remember, these are a guide to help you, not a strict test that has to be filled out perfectly. For some, it is as simple as jotting down some notes and thoughts; others choose to print out the sheets and make it a staff activity. Either way, the important part is to take action toward your goal of better client care.

1. Contact us. This can be done by emailing us at info@globalvisiontech.com or calling us at 678-965-6821. We'll do two things in response. One, we'll ask you some questions based on the worksheets (remember, this is not a test, we're just gathering information to make an assessment as productive as possible). Two, we'll find a time that works for you to schedule your free "GVT Case Management System Assessment."

It really is that simple. We make this process as easy as possible because we know that any kind of change in an organization can be challenging and… well, a little scary. We are now in our second decade of working with non-profits, and we completely understand how seriously you take your mission to serve your clients. You don't want to do anything to jeopardize or degrade what you already deliver for your clients. Our gentle approach is intended to make sure "FAMCare: Rapid Case Management" is the right solution for you and also that you are comfortable with every step of the process.

Email: info@globalvisiontech.com
Phone: 678-965-6821

We wish you all success on your journey to improve case management for you clients and front-line caseworkers. Again, here is how to contact us to begin the process:

Oh, and by the way - DON'T FORGET TO CHECK OUT THE SECTION THAT FOLLOWS *"WHAT OUR CLIENTS SAY…"* AND ALSO THE WORKSHEETS… YOU WILL FIND THEM ON THE PAGES THAT FOLLOW.

What Our Clients Say About Us…

"Your team is a pleasure to work with. We've achieved more in 6 months with GVT and FAMCare than we did in three years with our previous system."

~ Dave Becker, Child Center Mary Grove, St. Louis, MO

"FAMCare is the most flexible, technically advanced and cost effective case management system we found."

~ Dave Newell, CEO Nebraska Families Collaborative

"Well, I will say this: I'm not very computer literate. I find [FAMCare] is very easy to follow and very user-friendly, which is very good for those of us who didn't grow up with a computer."

~ Barbara Coyne, Program Director, Abba House

"We have found it to be a great experience. We've managed now to automate most of our clinical forms and have found it really, really very good in terms of being able to get quick, reliable data in the areas of outcomes utilization, customer satisfaction, and risk management. I highly recommend the product."

~ David Juedemann, Quality Improvement Director, ECH, St. Louis, MO

"Over the past eight years we've worked with GVT and the FAMCare system to develop our own child welfare software system. Since then we've been able to provide enhanced reporting capabilities to all levels of the agency; use the system to standardize service level, paperwork and satisfy CARF accreditation requirements. It's been a successful collaboration."

~ Holy Cross Children's Services, Michigan

"I highly recommend GVT [FAMCare] to anybody… Our clients move several times a year, it's hard for anybody to keep up with... It's a very important tool for supervisors who want to stay appraised of cases and want to make sure that their caseworkers are doing what they're supposed to."

~ Remus Holbrook, Director, Caseworker Services, Genesee County Courts, Michigan

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"One of the things I've been most impressed with during our time with GVT is the quality of customer service and responsiveness after the "sale". The whole team has been incredible. The project manager is knowledgeable, easy to work with and has met the agreed upon timelines. As we strive to integrate quality improvement strategies through our entire program – we look forward to the availability of better and timelier data – using FAMCare."

~ Karen Alvord, CEO Liliput Children's Services

Current Case Management Worksheet

1. How much time does it take to get a client's intake paperwork finished? (Or if you currently use a software system, how long does it take to input data for a new client?). What are the challenges bringing a client aboard? Is it common for things to be missed?

2. How is access to crucial client information handled currently? Is it secure and efficient?

3. Draw a flowchart of a typical client as they move through your process. If you are on a paper and file folders, is the tracking sufficient to meet your needs. If you are on a software system, is tracking available and efficient? (Hint: Pay special attention to mapping your intake process as completely as possible. Write down each step.)

4. What reporting and data does your current method of tracking cases allow? Is it efficient and does it allow you to track trends? What key areas need to be reported that you find difficult to track?

5. What accountability do you currently have in place? How are flags raised if key data or documents are missing for clients? Are you able to track case manager performance and address weaknesses?

6. How long does it take to train caseworkers to handle cases with confidence using your current methods?

Congratulations! You've taken an important step towards better serving your clients by filling out this worksheet. Take the next step and let us help you analyze your options. Our "GVT Case Management System Assessment" is free and can help you understand what's possible.

If you email, call, or fax us with your completed worksheet answers, we can give you an expert analysis of your case management and schedule your assessment. You can scan and email your worksheet to info@globalvisiontech.com. Or you can fax to 1-888-202-1137. Would you rather just discuss your answers over the phone? That works too – call us at 678-965-6821.

Your Contact Information

Organization: ____

Contact Name and Title: Email:

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Phone: ______________________________________

Finding YOUR
Case Management Solution
Worksheet

1. List the most crucial information and documents that need to be collected from clients. Make multiple lists if necessary to cover all client types.

2. What improvements would you make to forms to improve efficiency?

3. Name at least two ways you could improve tracking client progress. List as many as you can come up with, but at least two. (Hint: If you have multiple departments, ask how they could better work together with better tracking and workflow).

4. What are some key statistics that would help you analyze and improve outcomes for your clients?

5. Do you currently have a budget for case management tools or software?

6. Are you audited? What could be done to make that process more ef- ficient? Also, do you work closely with community advocates, judges, or other third-party partners? Would it be helpful for them to have access to some of your files?

7. Name at least two ways access to case management data could improve collaboration and client outcomes. (List as many as you can come up with, but at least two).

8. What reporting data or tools would increase your grant and fundraising options?

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