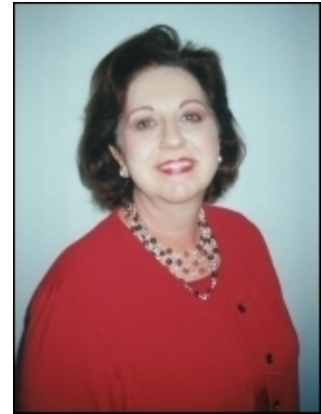


FROM MANY COMES ONE: THE CREATION OF A COMPREHENSIVE SOCIAL SERVICES NETWORK

By combining new technology, existing services, and a pioneering spirit, one non-profit Executive Director and her System Administrator set a new standard for community care.

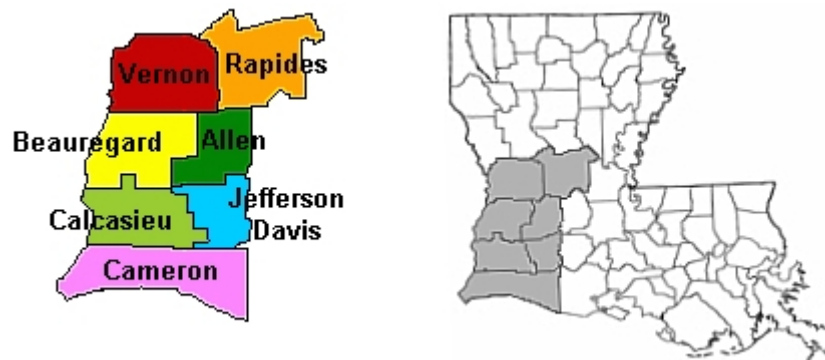
A THREE-TIERED PLAN

Beverly S. McCormick, Executive Director for the Volunteer Center of Southwest Louisiana, comes across as a classic Southern Belle. Her graceful charm, however, only complements her shrewd business sense. She speaks of managing her non-profit organization—which administrates service delivery across seven parishes—using the same tactics and strategies that succeed in the for-profit world. “The Volunteer Center of Southwest Louisiana and its three component programs,” she says, “are all mission-driven businesses that, rather than expanding profit margins, aim to help society, improve the community, and enrich mankind.”



Beverly S. McCormick

In 1995 McCormick launched a three-tiered, 20-year business plan for the Volunteer Center, with the ultimate goal of centralizing access to all community resources in order to provide better overall care for those in need as well as enhanced emergency preparedness and faster disaster recovery. Her first step was to unify the three programs already under her purview: the 310-INFO / 211 Call Center, the Volunteer Connection (a supporter pool), and the Homeless Management / Case Management Information System, or HM/CMIS.



The seven parishes (counties) within McCormick's jurisdiction.

The general steps comprising the three phases are preparation and launch, expansion, and continued refinement. Phase One, already complete, consisted of two years of marketing, strategizing, and logistics. One of the initial tasks was to determine which workflow system would best facilitate McCormick's vision of an interconnected resource network. After reviewing the options, Bowman Systems' flagship product, ServicePoint, was chosen for its numerous case management tools, its security, its web-based architecture, and its ease of use.

But choosing a software package was only the tip of the iceberg for Phase One. McCormick spent the next twenty-four months collaborating with the agencies within her Continuum of Care, building consensus for the HM/CMIS, and obtaining funding. The key, she knew, was to continually stress the potential benefits of such a system; to sell the idea before the product even existed. At every meeting and in every conversation she mentioned the Features, Advantages, and Benefits (FAB) of the HM/CMIS to promote her vision and to build anticipation. Over time word of mouth spread and her campaign paid off; interested parties began approaching her with questions and comments, more than a few individuals campaigned for her on their own, and in the end the Continuum united behind the concept of a centralized HM/CMIS. She was also able to garner from the city government a 20% cash-match pledge, computers and high-speed internet access for participating agencies (the number of which had doubled), and license subsidies.

A BUSINESS-SAVVY SYSTEM ADMINISTRATOR

To capitalize on the momentum McCormick had built, Jason Landry, the newly-hired System Administrator, applied the same business tactics that had helped him to succeed in the IT industry and while running his own e-commerce company. He and McCormick first formulated five high-level goals for the HM/CMIS:

- ▶ Develop a clear picture of how clients move through the program.
- ▶ Accurately identify the size of the chronic homeless population.
- ▶ Collect actionable data on the use of social services.
- ▶ Adapt the business model according to the data.
- ▶ Publish the data in a single, comprehensive report.



Jason Landry

Of course, greater agency participation would yield more data, and to that end Landry launched his own enrollment campaign. His first step was to build brand recognition for the HM/CMIS. In his discussions with other Continuums of Care he had discovered some confusion over the difference between McCormick’s new case management system and the branding that Bowman Systems had already achieved for its ServicePoint product. Because the HM/CMIS utilized ServicePoint technology, the decision was made to brand it as “ServicePoint Southwest Louisiana.” Landry licensed the trademark and logo, had stationary printed, secured a web domain (www.ServicePointSWLA.com), ordered promotional items with the new product label, and in all other respects altered his marketing to take advantage of the strength of the ServicePoint name.



Landry’s next step toward unifying his product agenda came when he developed a Signage Kit for all participating providers. The Kit is used to disclose confidentiality protections to clients who come in for service. It doesn’t replace a Release of Information (ROI); rather it is a preliminary measure in educating clients about their rights. It also shows conformity throughout the HM/CMIS; as clients travel from one member agency to another they will recognize the standardized ServicePoint sign.

Security was also a concern for the providers themselves. Some domestic violence shelters, AIDS clinics, and mental health agencies expressed trepidation over the safety of their clients and their clients’ information. For these providers Landry demonstrated a few of ServicePoint’s security features, including its “Unnamed Client” option (used to protect anonymity), its full HIPAA compliance, and how client data is encrypted within the ServicePoint database. In most cases the ServicePoint security and tracking features were more stringent than what the agencies had in place at the time.

For all providers that had initially signed on to the system Landry conducted site visits and training sessions with key users. He developed a checklist to help agencies ease into the transition from pen-and-paper or Excel transactions to ServicePoint. Bowman Systems trainers were also available to instruct new users. And before an agency could activate its licenses (two are issued by default), a set of criteria established by Landry had to be fulfilled, including:

- ▶ Signing the Volunteer Center’s Terms and Conditions agreement

- ▶ Completing a Homework Program over a two- or three-month period wherein data entry is practiced on the training site
- ▶ Reviewing and implementing the agency's security needs
- ▶ Reviewing with the agency's Senior Management any custom assessments that will be needed or have been created

The Homework Program was one of Landry's personal innovations. Bowman Systems provides a practice site for all of its customers but Landry went a step further by having Bowman technicians copy an exact replica of his live site to the training site minus any client data. This allowed all of his users to train with the same provider setup and security settings that they would see after implementation. By monitoring and evaluating user performance (as they entered data on the practice site) Landry was able to ensure that only competent users were active on the system. The Homework Program that he created led to uniform proficiency among new users.

For a more detailed look at the technical set-up of the Continuum of Care, see the sub-section entitled "ServicePoint Southwest Louisiana: Architecture" on page seven.

THE KICK-OFF

ServicePoint Southwest Louisiana was officially launched on March 3rd, 2006, when McCormick and Landry hosted a catered, open-house event at a local restaurant. All of the providers already using the system were invited, along with 20 faith-based organizations, a collection of civic groups, and a handful of government representatives. A Bowman Systems Sales Representative was also present to provide hands-on exercises with the ServicePoint interface and to demonstrate the full capabilities of the software. Landry spent the time stressing the power and flexibility of ServicePoint Southwest Louisiana, showcasing the system's Disaster Preparedness Plan, its ability to prevent duplication of services to clients among multiple providers, its agency and program index, and its reliable, scalable, high-speed access to the community's resource pool. McCormick's vision of a comprehensive social services network had become a reality.

MOVING FORWARD

With Phase One out of the way, McCormick and Landry turned their attention to Phase Two, the growth stage. Top on the list of priorities was to develop a plan for continuing education, as new agencies would be entering the system and existing agencies would have user turnover. To educate new users Landry

frequently hosts lunch-and-learn training seminars—again utilizing the replica website—and invites a Bowman Systems trainer to visit every six months. He also conducts demonstrations with agency leaders to show off the system’s capabilities. Most importantly, he visits user sites for Performance Evaluations. During these visits he ensures that all data is properly handled and registered. By running regular provider reports and monitoring data quality Landry is able to quickly identify and resolve any minor problems that might crop up, before they become major issues.

In order to grow, any business must have a steady income. To that end, Landry charges agencies \$50 per user per month to participate in ServicePoint Southwest Louisiana. Although this is a for-profit tactic, it enables Landry to continually expand use of the system to more providers, and it also creates a sense of value among participants. “You get what you pay for,” says Landry. “If it’s free, it doesn’t mean as much. Now there is a sense of ownership.”

All of the revenue generated from the license fees is re-invested in the system. Using these funds Landry was able to purchase the CommunityPoint module, which creates bridges between disparate service agencies and broadcasts their availability to the public, as well as the CallPoint module, which facilitates caller registration and assistance. The 211 Call Center benefited greatly from these enhancements, as the new modules made possible not only broader, better, and faster call responses but also made available a stockpile of call logs for research and analysis.

Landry’s next expansion purchase was Bowman Systems’ Advanced Reporting Tool (ART). With ART a collection of reports can be produced, such as the Monthly Audit, which collates data on provider percent usage, number of clients served, number of services provided, percentages of clients in families, and more. This report effectively allows Landry to keep his finger on the pulse of the system.

Also available through ART is the Quarterly Report which, in concordance with the five high-level goals that had been conceived in Phase One, made it possible to collect and publish actionable data on the social services community in a single, comprehensive report. The very first quarterly analysis produced by ServicePoint Southwest Louisiana not only spurred involvement from agencies that had previously only expressed interest but also helped enrolled agencies to identify gaps in performance and how they could improve.

THE ROAD AHEAD

A successful effort has been made (and continues) to expand ServicePoint Southwest Louisiana beyond its HUD-funded client base to non-HUD-funded organizations. As more agencies join the maturing system McCormick and Landry both look forward to adapting to new challenges as they arise and to continually finding better ways to serve those in need. McCormick is also emphatic that Phase Three—perpetual refinement and improvement—will never end. So long as people such as herself and Jason Landry are at the helm, with just the right mix of business sense, charity, and ambition, and armed with powerful network solutions, the original mission of ServicePoint Southwest Louisiana—to help society, to improve the community, and to enrich mankind—might well become the standard for the social services industry.



SERVICEPOINT SOUTHWEST LOUISIANA: ARCHITECTURE

ServicePoint Southwest Louisiana takes advantage of the ability within ServicePoint to establish multiple levels of providers. In this case, the hierarchy is five levels deep. The Continuum of Care is set as the top tier, with Disaster, 211, HUD, non-HUD, and other providers below. See Figure 1.

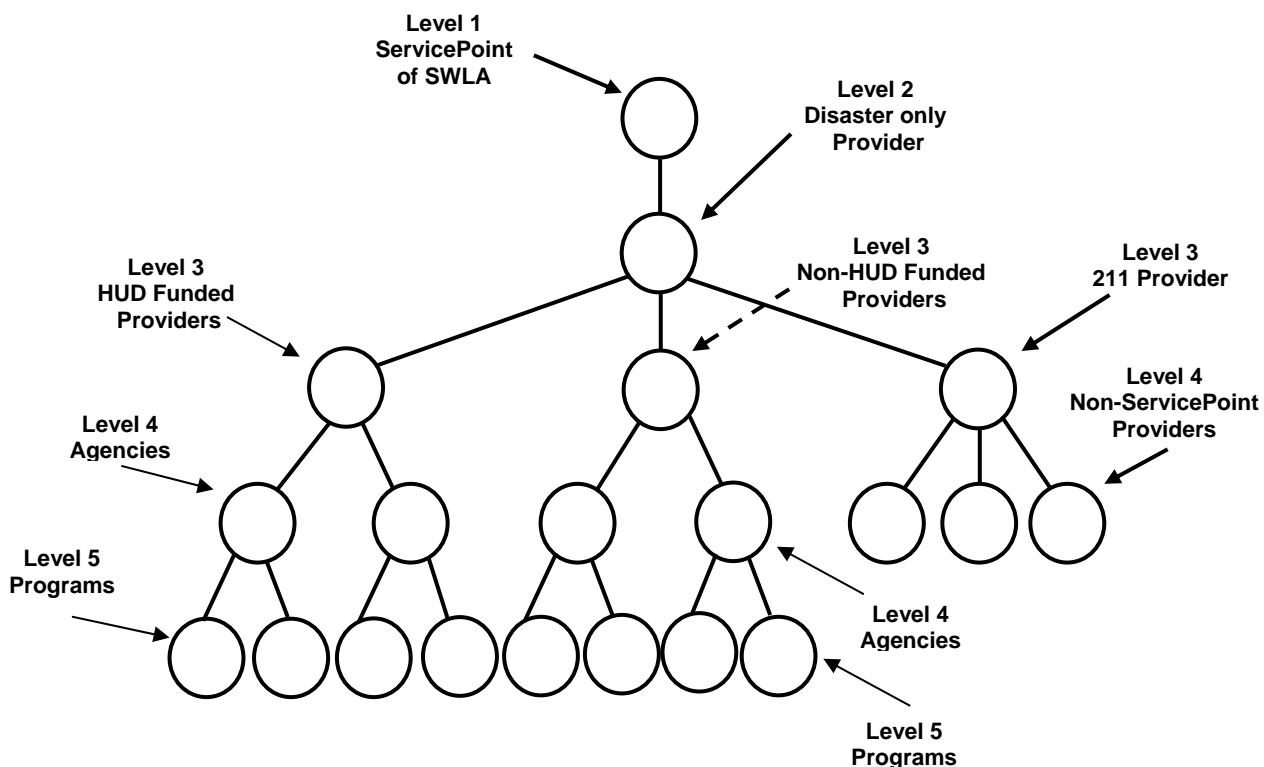


Figure 1

The Level 2 provider is a Disaster-Only agency that is activated when a catastrophic event strikes an area, such as Hurricanes Katrina and Rita. Under such circumstances providers that would not normally have access to privileged client information—such as medical data—can be granted temporary admission.

The Level 3 providers are divided into three general categories: HUD-funded, non-HUD-funded, and 211 call centers. On Level 4, beneath the 211 call centers, all non-ServicePoint providers are grouped. The HUD and non-HUD ServicePoint agencies continue to subdivide on Level 5.