Outreach Services Client Contact and Outcome Tracking Platform

Catholic Charities, Diocese of Raleigh, needed a database system for tracking clients, services, and outcomes for reporting to their stakeholders and funders.

Goals

- Provide statistical evidence of positive outcomes and return on investments
- Maintain a shareable database across multiple locations throughout North Carolina
- Deliver a solution that is simple to use by volunteers and easily maintained by minimal technical resources in the main office

Approach

- Facilitate roundtables between front-line workers and back-office stakeholders to assure that usable data can be captured without upsetting the core mission of efficiently providing outreach services
- Identify future needs beyond the initial scope as envisioned by the client
- Develop an extensible data capture and reporting platform that allows the implementation of new forms and reports by Catholic Charities internal staff

Technology

- ASP.NET application hosted at 3rd party managed data center
- Microsoft SQL Server Database
- Existing windows computers at regional offices, many running outdated web browsers at 800x600 resolution.

Results

- System is currently maintaining information regarding millions of services provided to over 350K clients and 100K families by hundreds of workers at 30 locations.
- The production effort of stakeholder and funder annual reports reduced from months to days.
- Information from the system supports grant applications, location performance analysis, and service efficiency analysis.

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Understanding the client's immediate needs

After several unsuccessful attempts to develop a database system using off-the-shelf software, Catholic Charities approached Digital Mettle for assistance in doing a build vs. buy analysis to "computerize 8 data forms."

As part of that initial consulting engagement, it was discovered that the initial "8 data forms" were, in fact, over 20 client and service intake forms that had been "mashed together" to save paper. By attempting to follow directions precisely, the previous developers had run into insurmountable technical hurdles based upon incorrect assumptions. It was also discovered that the system implementations were done without input from the field-workers and inadequate training had been provided, which resulted in irregular usage and poor compliance.

Determining the client's long-term needs

By facilitating meetings that included internal stakeholders, regional managers, and system users, a joint decision was made that what was ultimately needed was not a simple desktop application that would "computerize 8 data forms", but a web-based data management platform that would allow Catholic Charities to implement the 20+ necessary forms as well as the abilities to: quickly roll out additional intake forms as new services are offered; generate both templated and ad-hoc reports; include workflow knowledge of what information was prerequisite to the capturing of other information; and transparently handle data integrity and security permissions (including HIPAA compliance).

Supporting a low-tech user base

Data input is largely performed by volunteers with minimal training and a culture of techno-phobia. To overcome this issue, Digital Mettle proposed a 'two stacks of forms' paradigm based upon the existing paper-based workflow. This was designed to facilitate training and usage by volunteers.

After locating the correct 'file folder' for the client in front of them, the user selects from a stack of available (blank) forms or from the set of previous completed forms for that client. The availability of forms in each 'stack' is based upon the user's role: food pantry volunteers see food services forms; counselors see counseling forms; regional managers see all forms and reports specific to their locations.

Meeting the challenges of unique client identification requirements

Catholic Charities does not use Social Security Numbers or other government-issued identification to uniquely identify individuals. This created a challenge for searching for individuals in the system. Digital Mettle met the challenge by creating a search tool that scans multiple fields to build a list of potential matches and gives the user additional information in order to find the correct client record.

Catholic Charities also designates some services as being provided to the individual and some services to the family unit, but does not have unique identifiers or designate any individual as the 'head of household'. The challenge of family services identification was addressed through a 'virtual forms replication' mechanism. Any record of a service provided to the family unit is visually replicated into each family member's folder, however the data is kept as a single record in the database.

Ongoing Maintenance and Long-Term Relationship

In the 10+ years since its initial rollout, Digital Mettle has trained multiple Catholic Charities data technicians on methods for enhancing the system. The number of data entry forms available has expanded to over 60. The system is now used to track donations as well as volunteer time.

In addition, Digital Mettle has worked with Catholic Charities to roll out new instances of the platform in a cloud environment for multiple other partner Food Pantries in North Carolina.