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A COYOTE SUCCESS STORY

Six Family Service Agencies implement new web-based caseload management system

When the time came to finally leave their legacy system behind, six of Ontario's Family Service Agencies formed a partnership and worked with Coyote Software Corporation to craft the perfect replacement. The result: CASEWORKS, a comprehensive caseload management and recording system. CASEWORKS is now being adopted by a growing number of health and social service organizations.

CUSTOMER PROFILE

Burlington Counselling & Family Services
Catholic Family Services of Peel-Dufferin
Catholic Family Services of Hamilton-Wentworth
Family Counselling Centre of Brant
Family Services of York Region
Halton Family Services

INDUSTRY

Health and Social Services

LOCATION

Ontario, Canada

COYOTE SOFTWARE SOLUTION

CASEWORKS

RESULTS

Improved Workflow

More Accessible Case Information

Better Caseload Monitoring Capabilities

More Time for Counseling

Better Funder Reporting Capabilities

Easier Access to Program Enrolment Data

Improved Safety and Security

Better Waiting List Management

THE CHALLENGE

The fact that many of Ontario's Family Service agencies were still using a DOS-based client database as recently as 2005—almost 20 years after Microsoft first introduced the Windows operating system—tells you something about that sector's innate resourcefulness. Maybe it's because they're essentially all problem-solvers of one kind or another—counselors helping families cope with all of life's toughest challenges, supervisors juggling all of their caseworkers' burgeoning caseloads, and executive directors striving for the sustainability of their perpetually under-funded agencies. It may also be because CSMS, the custom DOS-based system that they managed to keep using for so long, continued to meet their specialized needs better than any other database available on the market.

Whatever the reason, in 2004 a group of six Ontario Family Service agencies got together and decided that it was finally time to replace their antiquated database with a modern, web-based alternative. They recruited one of CSMS' originators, Kirk Were, to guide them through a comprehensive requirements analysis and feasibility study, and embarked upon a search for the ideal replacement for CSMS. The solution needed to meet the needs of their core job functions for case administration and management, and it needed to be affordable and connected to a sustainable model for ongoing support and future enhancements.

They had a long wish list. According to Nancy Brown, Executive Director of Halton Family Services, "We wanted a comprehensive database program that would handle all of our client information, as well as billing and scheduling. We wanted something that would do it all, in a user friendly way, be affordable and reliable. We also wanted centralized scheduling and beefed up reporting capacity, for funding purposes."

The agencies considered three approaches: build from scratch, off the shelf, or buy and modify. Recognizing that they would likely need such a system to contain many custom-built features, they also prepared criteria for choosing the ideal software development firm to hire. "We didn't want too large a company," said Linda Dayler, Executive Director of Catholic Family Services of Hamilton and President of Family Services Ontario. "We wanted a vendor that would give us personal attention, be cost-effective, and capable of developing and supporting a system that would meet our specific needs. We also wanted them to have a familiarity with the social services sector."

THE SOLUTION

After months of searching and presentations by six different short-listed vendors, in the end the group selected Coyote Software Corporation to create their custom case management system for them. To hear Ms. Dayler describe it, Coyote was the clear choice.

"The number one reason that we all cited was Coyote's ability to work with us on an individual basis, and their personalities. They were open, they were creative, they listened, they wanted to be innovative, and they weren't trying to fit us as a square peg in a round hole," said Ms. Dayler. "The other companies' approach was 'this is our system and you'll have to adapt to it'. Coyote's was 'let us work closely with you to understand your job functions and workflows, and we'll build a system that works for you.' And the price was right. They really understood our price constraints, and really came to the table with a good cost structure. They clearly outlined how much it would cost us, and what they would provide for us."

CASEWORKS *Case Study*

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Ontario Family Service Agencies / CASEWORKS
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Ms. Brown added that "Coyote had extensive experience building solutions for many health and social service sectors—including mental health, child welfare, and supervised access   That was attractive to us, as was the fact that their software worked, and that they were local. When Kirk, who has an extensive background in building software for health and social service organizations (5,000 physicians and hundreds of community-based agencies), began to talk with them on our behalf, he was also very impressed with what he saw." The feeling was mutual: as a result of these initial meetings, Mr. Were eventually joined forces with Coyote and continued to guide the development of the CASEWORKS system from within the company.

With the firm selected, the elaborate task of building the software began. From the outset, Coyote took a consultative approach that both Ms. Dayler and Ms. Brown describe as "a true partnership between Family Services Agencies and Coyote." The company's business analysts conducted an extensive study of the agencies' operations, closely watching counselors and other staff members at their jobs in order to understand, capture and translate their workflows into software.

The ambitious project took months of dialogue with individuals and committees representing each type of worker's needs, and numerous software prototypes were produced along the way for testing, feedback and revision. "We certainly felt heard," said Ms. Brown. "When we said to Coyote, we need you to come in and hear about how we do things, and we need to be assured that this product is going to meet our needs, that definitely happened."

In addition to crafting the software to meet the specific needs of Family Service caseworkers, Coyote also helped to craft the creative funding structure that allowed all of the participating not-for-profit agencies to afford the system being built. Ms. Dayler explained, "In many systems, you have a limited number of users and then you pay for any additional users above that. But this license is quite different. There is no limit on users. Licensing is based on organizational size, making it affordable for large and small organizations. It is a unique arrangement and a partnership model that works."

Besides the fairness of the fee structure, the terms of the licensing agreement also require new organizations purchasing the database to pay an initial fee which goes into a trust that is used for further development of the system. An executive committee keeps a list of development priorities and decides when and how to allocate the funds in the trust. As Ms. Dayler put it, "It's like a co-op. The more agencies we have, the more we have in our reserve fund. It's very affordable, which was one of our criteria. And it had to be sustainable as well. What's the point of putting in all that money if we couldn't sustain it with our annualized budgets?"

THE FINAL PRODUCT

When it came time to test the final product, now called CASEWORKS, Ms. Dayler's Catholic Family Services of Hamilton was chosen as the pilot site because it was one of the largest, and because it had several satellite locations in which the data-sharing capabilities of the system could be tested.

"The pilot went extremely well," she said. "It was really helpful. Coyote did all of the education of the staff, and then we selected staff within our organization to be our on-site resource people, and they received more intensive training from Coyote."

After the success of the initial test, CASEWORKS was then implemented in all five of the other agencies, in each case allowing them to finally say farewell to their DOS-based legacy system without losing any of its historical data. Ms. Dayler explained, "Coyote had to create an interface so that we could move our old data into our new CASEWORKS system." Ms. Brown agreed, "The data conversion from our legacy system was a concern that we had, and it went quite smoothly. That data is now in CASEWORKS, and we can look it up anytime."

In the end, were they satisfied with the whole development process? In Ms. Brown's opinion, "It has been excellent. Coyote has been accessible, they stuck to the original cost structure, they've given us pretty realistic delivery dates, and they have provided what they said they'd provide. I really am very, very positive about what Coyote has done for us."

Ms. Dayler was equally positive about the development process. "Yes, Coyote had a learning curve, but fortunately they already had some knowledge because they had developed other social service systems. So they built on that knowledge, and then we taught them. And they taught us. They came to each of our organizations, they met with each group, and our users went to Coyote. So it was a really good mutual relationship, where we really built those bridges together. We really did learn together."

THE BENEFITS

As for the results of all that learning, collaboration and software development, both Executive Directors are effusive in their praise of the CASEWORKS system that their supervisors, caseworkers and support staff are now using on a daily basis.

"We've really liked the fact that CASEWORKS could be customized to our specific needs. I absolutely love that with a couple of clicks, I can go to any worker in the agency and see their caseload," said Ms. Brown. "I can look at any worker's schedule and see what they're doing on a given day. Just being able to see the amount of productivity without having to run a report, to see visually whether people have enough interviews at a given time period, is very nice."

She continued, "I love being able to go into the records really, really easily, and the other supervisors like that as well. Say you want to make sure that a worker is up to date on their recording. We can either look at the service events and see the recording dates, or we can very easily go right into the electronic record, open up that recording and see if it has been done adequately. This is all from the comfort of our own desk, very easily and quickly.

"The same applies for records in our branch offices: if we want to look at the dictation in a worker's record in one of our other locations, we can do so with the same ease as with any other record that is here. For example,

a supervisor at one of our satellite offices recently had a very, very difficult case, and she was emailing me saying, 'Nancy, would you read the notes I just made on this case?' Which I was then able to do with just a few clicks of the mouse. It was wonderful! Now, because it's all in CASEWORKS, anybody who needs secure access to a case record can do so if they have the authorization."

Ms. Dayler pointed out more benefits to supervisors. "Our Agency has many and varied programs and services, and we need to have the right metrics to monitor our caseloads and staff time. With the new system we can tell exactly how many hours someone's doing direct or indirect service, and we can get a very clear picture of our caseloads and all of the activity and recording for each case. I've never been able to do that before."

Both offered numerous examples to indicate that CASEWORKS gives their staff faster access to more information than ever before. "Now, for the most part, we're right on top of everything," said Ms. Dayler. "It's immediate. All of our client data is now in one spot, so it's not all over the place. When somebody calls and asks us about a client, we know exactly where that client is and what programs and services that client is involved in. The cases are immediately available; we're able to get the data out immediately."

"It allows us to schedule, and we can also do our recording right on the database. You pull up a client, and you do your case notes right there. That allowed us to enhance our central intake. Which means that staff is spending a lot more time doing counseling and a lot less time doing paper."

Ms. Brown added, "We recently lost two of our major employee assistance contracts, so we had to reduce staff costs wherever possible. CASEWORKS enabled us to do better client processes with fewer support staff—we could direct more money proportionally into service rather than processing paper."

She pointed out another benefit to funders: "With our legacy system, I could never tell our four United Way funding agencies exactly how many people had received our services in their community. CASEWORKS gives me those numbers. This enables me to give the United Way a far more accurate reflection of how many people are benefiting from their support."

The system also provides new levels of information to her own staff. "One of the new capacities has been the ability to see a person's enrolment in different programs. If I'm looking for Jane Smith, I can find how she's registered in CASEWORKS and see immediately that she's enrolled in our services for abused women, our credit counseling services, and individual couple and family counseling. Before, I wouldn't have been able to do that as easily."

Ms. Dayler agreed that new levels of information are now available to her staff as well. "This system allows us to enter associations and collaterals—you can enter not only the client, but also anybody who's involved with that client from a family perspective. So you can pull up a family name and CASEWORKS will tell you right away that it's a person whose family is already involved. So it's a very nice system to network."

Because of the nature of their agencies' services, some of Casework's benefits go beyond simple convenience to directly address the safety and welfare of individuals on both sides of the Family Services reception desk. "Another really, really good thing is the ability to see warnings—what the system calls 'Alerts'," said Ms. Brown. "So if we have a case where there's high risk of any kind, that immediately comes up in CASEWORKS. That's very helpful. It may be an alert to say 'No communication to this home', which might be because of an abusive husband, for example. And when that new case is scheduled for the case worker, the worker doesn't have to do a lot of searching to find out that this is a client who is potentially violent, for example. That's a very helpful thing to have."

She added, "We also have more reporting capabilities now. For example, the whole process of doing a 6-month review, which we're required to do for accreditation, is so much easier and faster. We can just get the service activity reports right on the screen.

"CASEWORKS also has a very good search function. You can quickly go in and get whatever kind of information you want—much more information than we were ever able to get from our old system. It gives our supervisors the new ability to search all records, open or closed."

She continued, "We also now have a much better waiting list capability. Because it's an aged waiting list organized by agency-defined criteria. That's certainly better, because I can now say exactly how many people have been waiting for how many months, and break it down in different time segments, which is very helpful."

UPDATE 2007: TWO YEARS ON

CASEWORKS has now been up and running at the original six Family Service agencies for almost two years. As part of their ongoing collaboration with Coyote, they have already enhanced their systems with new reports and features that further support their staff's caseload management work. In addition, the partnership has now expanded to include several other Family Service Agencies and other community-based health and social service organizations.

As it grows, the Family Services' CASEWORKS project continues to demonstrate the benefits of having a partnership of agencies with similar needs and interests. Recently, for example, one of the original participating agencies was able to act as a mentor organization for the implementation of CASEWORKS at three new agencies. Mark Creedon, Executive Director of Catholic Family Services of Peel, facilitated the process and provided personnel to assist the three new agencies with their CASEWORKS systems. Peel staff shared information on the challenges and learning that occurred during their own CASEWORKS installation, and helped make the new agencies' implementations run more smoothly by assisting them with their agency-level and program-level configuration challenges.

For more information:

About Catholic Family Services of Hamilton: http://cfshw.com/
About Halton Family Services: http://www.haltonfamilyservices.org/
About Ontario's Family Service agencies: http://familyserviceontario.com/
About CASEWORKS: http://www.coyotecorp.com/