Case Studies: Nonprofit/Social Services
Catholic Charities West Michigan (formerly Catholic Social Services)

Demographic Data Management

Work with CCWM began with a comprehensive assessment of data management needs. This involved interviewing all members of the leadership team, the program directors and key administrative staff regarding ways that they currently managed data and what their perceived problems and needs were.

The assessment led to recommended alternative solutions ranging from more expensive third-party solutions to more cost-effective use of existing Microsoft Office software. The preferred solutions focused on the use of MS Access, but with good integration of database functions with reports and mailing lists in Excel, Word and other components of the Office suite, as well as other software systems within the agency.

It was decided to begin by concentrating on an agency-wide system for gathering and managing demographic data on all clients (some data on families, other on individuals). The database system that was developed held all the data in centralized tables on the "back-end" while providing individual user interfaces that were unique to each program. This made it easier for each program to see and manage its own data, do customized analysis and provide reports for the programs, the agency or funding agencies.

Automated Report Generation

After the data management functions were well established, another important component was added. This was an automated report-generation capability. This began by cataloguing all the reports that needed to be generated throughout the year, for United Way, DHS, Catholic Charities, the agency's annual report, as well as needs to quickly generate numbers for proposal development and other purposes. Since there is great variation in the requirements for reporting for certain time-frames, an automated report function needed to cover any possible date range and all the variations of reports for different programs. The result of this database development was an automated report generator, available to all the program staff and to the agency leadership. By simply entering a date range (could be a month, quarter, any calendar or fiscal year) and selecting a report of the data for families, individuals or clients served within a selected program, a wide range of demographic-based reports were easily generated.

Data Management of Client Tracking and Outcomes

Another imperative for the major social service program areas (Child Welfare, Foster Care, Behavioral Health, Early Impact, Family Reunification, Families First, etc) was to be able to track the status of client services or treatment (due dates, completion dates, etc) and the measurement of outcomes of these cases (usually at closing, but sometimes during the case). Additional "forms" were added to the major program databases to easily add and manage these types of information. Subsequently, additional automated report functions were added to show case status, due dates, outcomes, trends, and other factors.

Performance and Quality Improvement and Accreditation

In addition to the general outcome measures and tracking mechanisms previously developed, capabilities have been added specifically to correlate standards and indicators with case outcome measurements. This is being done with accreditation in mind; therefore, specific accreditation standards are identified for program and agency objectives, and good ways of measuring performance vis-à-vis these standards are determined. Then "forms" and other functionality is built into the data management system to enter, manage, analyze and report success in achieving these objectives.

In the short run, this is helpful to the program directors and agency leadership in measuring their performance and thereby improving their service. In the long run, this will provide a solid foundation for demonstrating success across a full range of indicators in meeting accreditation review standards.

Additional Specialized Data Management Components

The previously discussed elements had to do with client services and client stats. In addition to these, data management functions were also developed for personnel and fund-raising purposes. One of these was a training database, which also works with accreditation standards, to manage information on all staff training and to make sure that staff training is provided within the time frames required. Other human resources and development (fund-raising) functions are also supported.

Coordination of Localized Databases with On-Line Systems

Finally, there are some key program areas (particularly foster care) where much data is entered and managed in web-based systems, but there is a need to coordinate this with additional data maintained "off-line" on the desktop or the local area network. In these situations, very efficient ways have been devised to ensure that everything in the local (usually Access) database is completely in sync with the on-line data.

This is essential because there is much data particular to the agency that is not managed in the on-line system, and it is necessary to maintain this data in Access (and other components of the Office Suite) or other localized databases. This also provides much more flexibility as there are many needs for specialized reports, due dates, mailing lists, and customized analysis. The integrity of the data is maintained and the usefulness of the data is greatly enhanced by having good integration of these system components.

Summary

These are examples of ways in which data management tools can be employed separately or as part of a larger system to provide a higher level of service to clients. The greater efficiencies and clarity of processes, combined with very cost-effective systems, leads to much improved attainment of strategic and program objectives.