

5 Pitfalls of Shared Case Management and How A Brand New Platform Overcomes them All

- 1 Too Expensive
- 2 Too Hard to Use
- 3 Too Many Requirements for Data Entry
- 4 Not Enough Local Organizations Use the System
- 5 No Way to Broadcast Family Needs



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Pitfalls of Shared Case Management & How a

Brand New Platform Overcomes

Unifying a city in service to the poor is no small task—and today’s economic climate and limited resources are making this challenge one that ministries and churches wrestle with daily. Avoiding service duplication, stewarding donated resource, and most importantly, moving families toward healthy self-sufficient lifestyles are critical components of a comprehensive city-wide approach to the issues of poverty.

Shared Case Management (SCM) systems can facilitate collaboration in how ministries and churches help families. With it, service providers quickly share information about what has been done for each family. That enables each of them to make better decisions about how to have the greatest impact in the community and in each family’s life. For example, when the person walks into a church or ministry that uses SCM, the contact person loads in whatever information the family will provide (e.g. phone number, address, Driver’s License, SSN#) and the system searches the local database. If it finds that person, then the administrator will see needs currently listed in the system for their household, other organizations that have helped that household, and what they did for them, even if it happened 1 hour ago. Sharing a common platform allows organizations to work together in unity to meet local needs and prevent potential “abusers” from taking advantage of anyone’s generosity.



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But SCM only works if many agencies and churches in a city will use the same system. For example, churches do not typically have the budget to purchase SCM systems nor the time to enter all of the data required by most of them. So Meet The Need developed a best-practice SCM platform that is now available at no cost to agencies and churches. And Meet The Need does not require much data entry so that churches and ministries alike can be on a common platform.

Five Reasons that SCMs Typically Fail to Produce Promised Results:

- 1 Too Expensive
- 2 Too Hard To Use
- 3 Too Many Requirements for Data Entry
- 4 Not Enough Local Organizations Use the System
- 5 No Way to Broadcast Family Needs to Those Who Can Help

Each of those is answered by a new SCM platform called Meet The Need. In this eBook, we will explore these 5 issues and how Meet The Need will unite and mobilize organizations to work collaboratively, bringing far more help and hope to families in need.



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1 Too Expensive

**There is a best-in-class and free of charge
Fortune 500 solution available!**

For missions, homeless shelters, food banks, and most agencies, their central purpose is serving families in need. So keeping track of what they do for families is a core function. Because SCM is the lifeblood of most ministries, there are a number of software vendors who provide case management solutions. Most are designed solely for use by a single agency. A few are designed to be used collaboratively, for shared case management. City and county governments often mandate that agencies who want access to government funding (e.g. FDA, HUD) must use their SCM databases. But that mandate typically only applies to use with families who are homeless. Organizations are free to use other systems for keeping track of their work with families who have residences.

Case management and SCM solutions sold by vendors are typically expensive. Setup, maintenance, license and other fees make many of them too expensive for small and mid-sized agencies. As a result, many use spreadsheets, custom databases or other low cost solutions that may save those vendor fees but are difficult to maintain and cannot be shared.



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As for churches, they are not willing to pay for case management or SCM software. But churches who do benevolence work will use it if it is best-in-class and free of charge.

Meet The Need is a non-profit ministry whose purpose is to enable churches and ministries to unite and mobilize to bring help and hope to those in need. Meet The Need has been in development for 10 years and was just rolled out nationally in 2012.

Meet The Need understands that for churches and ministries to work together effectively, they need to be on the same platform. So Meet The Need provides churches and charities with sophisticated software and services that would be expensive in the for-profit world. And despite offering a state-of-the-art SCM solution that takes work off staff and increases each organization's impact in the community, Meet The Need has no required fees.



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Meet The Need is donation-based rather than fee-based because that's what is necessary to create rapid, widespread adoption of a shared platform by churches and ministries in a community. In other words, it is much easier to get pastors, ministries, associations and other influencers to adopt and recommend Meet The Need if there is no up front cost.

As a 501(c)3 Public Charity, Meet The Need is funded in large part by donations from a group of individuals and foundations who believe in Meet The Need's mission and feel called to support the ministry. However, the costs of providing churches and ministries with a sophisticated local mission solution are significant. So they ask churches and charities to consider making donations to help Meet The Need cover those costs, as well as help fund expansion. Because the software has already been built through the generous contributions of wealthy Christian business people, all the (substantial) software development costs are already behind them and the ongoing costs are all that need to be covered.



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2 Too Hard to Use

A robust, quick to learn, and easy-to-use system is available!

The most common complaint about case management systems is how difficult they are to learn and maintain. Many agencies and their employees have little technical proficiency. Training a new employee on a new system can be time consuming unless the software is very intuitive.

Most case management systems are not straight-forward. Government developed systems rarely are simple due to the imbedded regulations and mandates. And private vendor case management applications often build in so much functionality that the systems become complicated to navigate and utilize.

Meet The Need's mission is inclusion – ensuring all agencies and ministries use the same platform for tracking and managing their work with families. Although Meet The Need's SCM solution is robust, it is simple enough for any organization and employee to learn quickly. Loading a family, entering household information, posting needs, recording visits, scheduling future visits and reading reports are all available on just a few screens.



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Our Local Families ⓘ

[Families](#) | [Scheduled Visit Management](#) | [Item Report](#) | [Family Report](#)

Range:
 Visibility:
 ⓘ To view and activate newly registered Families select Inactive

| Name | Address | Open Needs | Visit Summary | Status | Action |
|---------------------------------|---|----------------------------|--|------------------------------|--|
| Jack Smith | 123 Main Street Pinellas Park, Florida 33525 | Boy's Clothes - Ages 11-14 | 5 previous visits. Last on 02-01-2012 (9:30 AM), given: Nothing given | Active - Click to Deactivate | <input type="button" value="Details"/> |
| Julie Williams | 123 Main Street Odessa, FL 12345 | No open needs. | No recorded visits. | Active - Click to Deactivate | <input type="button" value="Details"/> |
| Julie Williams Jamie Johnson | 343 Main Street Tampa, FL 12345 | No open needs. | 21 previous visits. Last on 12-23-2011 (9:15 AM), given: Nothing given | Active - Click to Deactivate | <input type="button" value="Details"/> |
| Lana Brown | 4093 Tampa, FL 12345 | No open needs. | No recorded vi | | |

Post Need or Record/Schedule a Visit ⓘ

Easily locate a family in the SCM, quickly determine what help has already been provided, and note services your ministry is providing. Then, post a need for local church members to see if appropriate.

In fact, all functions are designed to be 1 click. Meet The Need takes every possible step and click away from users to make the system easier to navigate. That means much more technology development work on Meet The Need's part and more files in their

system, but it makes the user experience that much more simple.

Search Offers & Post Needs

Before adding a need for someone, you must see if there are any offers available. If not, then you can post a need. You must fill out all information on the form below down to the Sub-Category level (other than "All") in order to post a need for this recipient.

Search Offers

I Want to Help a:

By Providing:

Category:

Sub-Category:

Country:

Zip Code: Distance:

Add or Schedule Visit

If you are providing services or other support for this family, record the visit and the nature of the assistance provided by clicking "Add Current Visit". You may also schedule the family for a future visit to receive assistance by clicking "Schedule Future Visit".

View and record current family visits

Schedule a future family visit



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For example, Meet The Need developed the first scheduling system for running charity drives involving multiple organizations. It is so simple to use that no training is needed for a new user (e.g. volunteer at a public school) to begin loading families and booking families to receive items (e.g. toys, food, backpacks).

The screenshot displays the 'Schedule Visit For John Smith' interface. It includes a 'Date / Time' field set to 02/07/2012 9:45 AM, 'Reasons' and 'Referring To' dropdowns, and a table for 'Items to Be Provided'. A 'Gift Cards' modal is open, showing fields for Quantity, Dollars, Card Type (set to Department Store), and Other. The background shows a calendar view with time slots from 9:00 AM to 11:00 AM.

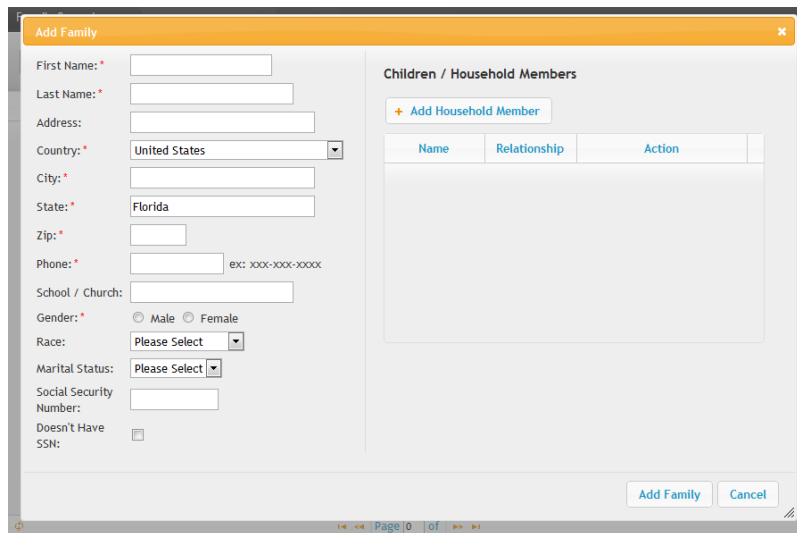
Register families to receive specific items at a specific date and time. For example, arrive on December 23 at 3 p.m. to receive toys for a 5th grade boy and 2nd grade girl.



3 Too Many Requirements for Data Entry

**Capture as much family information as you like
but only what is needed to identify a person is required!**

Because Meet The Need is a private-sector non-profit, it is not subject to mandates for data collection and input imposed on government-run SCM databases. Again in the case of Meet The Need's SCM scheduling system for charity drives, the screen shots below show how little data entry is required – only what is needed to identify a person or household member.

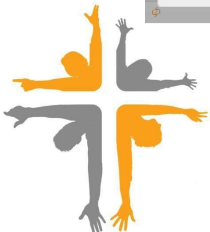


The screenshot shows a web form titled "Add Family". The form is divided into two main sections. The left section contains the following fields:

- First Name: *
- Last Name: *
- Address:
- Country: * (Dropdown menu showing "United States")
- City: *
- State: * (Dropdown menu showing "Florida")
- Zip: *
- Phone: * (with a format example: ex: XXX-XXX-XXXX)
- School / Church:
- Gender: * (Radio buttons for Male and Female)
- Race: (Dropdown menu showing "Please Select")
- Marital Status: (Dropdown menu showing "Please Select")
- Social Security Number:
- Doesn't Have SSN: (checkbox)

The right section is titled "Children / Household Members" and contains a table with the following columns: Name, Relationship, and Action. Above the table is a button labeled "+ Add Household Member". At the bottom of the form are two buttons: "Add Family" and "Cancel".

A major purpose of SCM is to avoid duplication to help organizations better steward their limited resources. So Meet The Need allows organizations to enter only as much information as they are given by the family, as opposed to government mandated systems which require many more data fields be filled out.



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Easily add and update family information including address, phone, employer, income, and other household members.

| General Information | | Employment / Education | | | | | | | |
|------------------------------------|-------------------------------------|--|------------------|------|--------------|--------|-------------|-------|-------------------------|
| Type | Individual/Local Family | Currently Employed | Yes | | | | | | |
| Name | Jayne Dough | Employer | CVS Pharmacy | | | | | | |
| Gender | Female | Employment Type | Part Time | | | | | | |
| Race | Caucasian | Highest Level of Education | Some High School | | | | | | |
| Marital Status | - Not Provided - | In School | No | | | | | | |
| Disabilities | None | Length of (Un)Employment | - Not Provided - | | | | | | |
| Long Term Disability | No | Income/Assistance | | | | | | | |
| Address | 123 Main Street | Previous 30-Day Income | \$650 | | | | | | |
| City, State Zip | Anytown, PA 12345 | Income Sources | None | | | | | | |
| Phone | 800-555-8000 | Assistance from Agencies | - Not Provided - | | | | | | |
| Email | - Not Provided - | Household Members | | | | | | | |
| Church / School Affiliation | - Not Provided - | <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Tommy Dough</td> <td>Child</td> <td>Details</td> </tr> </tbody> </table> | | Name | Relationship | Action | Tommy Dough | Child | Details |
| Name | Relationship | Action | | | | | | | |
| Tommy Dough | Child | Details | | | | | | | |
| Homeless | No | Notes | | | | | | | |
| Life Circumstances | Young single mom on limited income. | | | | | | | | |
| Referring Agency | ABC Women's Center | | | | | | | | |
| Referring Person | Lynda | | | | | | | | |
| Date of Birth | 02/10/1992 | | | | | | | | |
| Driver's License | None | | | | | | | | |
| Spouse's Name | - Not Provided - | | | | | | | | |

Meet The Need's core SCM platform permits organizations to capture as much profile information about the family and household as they would like. But very little data is required and even less is shared with any other organizations – only what they need to know to avoid duplication of services.



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4 Not Enough Local Organizations Use the System

City-wide platform connects “behind the scenes” to share needs for volunteers, resources, events, drives, and families!

Churches have always struggled to process, filter, and communicate (to its members) the vast array of needs in the community. Ministries have likewise struggled for far too long to share their volunteer, resource and family needs with hundreds of local churches. There has never been an easy way to communicate needs to those who could help. When Meet The Need began looking at these issues in 2000, it was amazing and unacceptable how arcane and broken the processes are for collaboration and communication among churches and ministries within cities and nationwide. Oddly enough, without Meet The Need that situation remains the same today.

Prior to Meet The Need, no true innovation had ever been brought to the world of “local missions”. Solutions that could unite and mobilize the body of Christ to bring help and hope to those in need have existed in the business world for some time, but they were never transported to the world of local missions. So Meet The Need spent the past 10 years developing that shared platform for serving communities.



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Meet The Need is a Fortune 500 caliber solution for a world that still lives in the 1980s – where needs are communicated and help is sought via pen, paper, phone calls, emails, the pulpit and the church bulletin. But now for the first time, through Meet The Need churches can provide a "window" to the outside world, showing members live opportunities to serve at their church, at local ministries or local families in ways that fit their skills and interests. And now ministries can immediately communicate their volunteer and resource needs to a large number of churches, church members and the community.

Rather than driving everyone to one web site, Meet The Need instead gives each church and ministry all the tools they've been lacking for so long to efficiently manage their own activities. To make sure all organizations in a city say "yes" to Meet The Need, it offers those best-in-class solutions at no charge. Empowering each individual church and ministry with a local mission platform that saves them time, gives them total control, and increases their impact in the community - and then giving it away - is a huge step toward unity, collaboration and mobilization. Soon the city is on the same platform connected "behind the scenes" to share needs for volunteers, resources, events, drives, families, etc.



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All of this is even "Private Labeled" where each church's members, each ministry's volunteers and the community will have no idea Meet The Need exists. Every part of Meet The Need's functionality is customized to look just like the web site of the church or ministry. It's about your heart for serving that matters, not Meet The Need's.

The screenshot shows the Calvary Baptist Church website. The top navigation bar includes links for Home, E-Giving, Contact Us, and a search bar. Below the navigation is a banner for "40 YEARS OF HOPE" with a search box and links for Login, Subscribe, Donate, and Contact. The main content area features a "Local Opportunities" section with the following text:

If you would like to bless others in our community, here are some options available to you:

- Calvary Cares** - a day to provide real help to those in our community by feeding the hungry, helping the needy and serving the community, usually in February or March. Our next date is September 24, 2011 ([read more](#)).
- Embrace Eisenhower Elementary** - an ongoing relationship with this elementary school right down the street. Opportunities to mentor, tutor, or read to students as well as help with classroom activities. If you are interested in volunteering at the school, contact Patricia Marder at 727-441-1581 ext. 111. Or you can fill out a **VOLUNTEER** form and return it to **Patricia Marder** along with a photo copy of your drivers license. Your Life Group or you as an individual can **ADOPT** a class today .
- Clearwater Intermediate School** - Calvary has formed a new partnership with this middle school and we are praying for many to sign up to mentor a student. You can find out more by contacting **Lori Barsi**.
- First Touch Prison Ministry** - opportunities to serve on a team to impact the lives of women coming out of prison

On the right side of the screenshot, there are four buttons: CALVARY CARES DAY, CALVARY PARTNERSHIPS, COMMUNITY NEEDS (GOODS & VOLUNTEERS), and FAMILY NEEDS (GOODS & VOLUNTEERS).

Your volunteer never feels like they leave your website as they search for ways to serve!



www.MeetTheNeed.org

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In summary, SCM helps a community move families to self-sufficiency and prevents anyone from taking advantage of your generosity, but only if many other local churches, agencies and ministries are using it. For example, in 2011 Toys for Tots, Salvation Army, YMCA, 50 local ministries, 100 public schools and many churches used Meet The Need to conduct a highly successful Toys for Tots drive. Because all of those organizations were using the same shared SCM platform, Toys for Tots in Central Florida learned how many families were receiving toys in multiple distribution sites in prior years.

Not only does Meet The Need track and report to other organizations where families have already been and to record the current visit and what they were given, but it also shows where the families are scheduled to be going and what items they will be receiving. The number of needs in 2011 was no doubt greater than ever, yet far fewer toys were distributed after deploying Meet The Need because it eliminated so much of that duplication. Toys for Tots will expand its reach because without duplication they can help many more families than ever before.





5 No Way to Broadcast Family Needs to Those Who Can Help

Broadcast needs of families (with anonymity and privacy intact) to local church members instantly!

The purpose of SCM is not to give each family what they need when they need it. It's about compassion. And compassion is about relationships. As has become increasingly clear and exposed in books like When Helping Hurts and Toxic Charity, transactional assistance like distribution of money or food during a big event is a band aid approach that may make the church feel better about itself, but only increases shame on the part of those who are reaching out for help. Instead, SCM brings with it the capacity to understand who the family is and build a relationship with them.

Without knowing where the family has already been, there is a temptation to give them what they are asking for to satisfy the immediate need. Worse yet, to say "sorry, we can't help but why don't you call..." and simply refer the person somewhere else because your organization doesn't have the time or capacity to get to know the family and give them the assistance they are requesting.



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But what if churches and ministries had the ability to see a good deal of information about the family's assistance history. Better yet, what if following its review of the family's history, a church that couldn't help that family is immediately able to respond by saying, "We're part of a giving network and would be happy to share your needs with our members as well as other churches and ministries in that network". Rather than turn people away, SCM provides the opportunity to understand who the family is and give an affirming and compassionate response to them. If that family's same needs are not already posted in the system, the church or ministry can post the needs into Meet The Need in a matter of a few minutes. In posting those needs, the burden will not fall on the church or just your members to meet them. Instead, those needs can be broadcasted (yet with anonymity and privacy intact) to other local churches and their members as well.

With Meet The Need, a family's needs have a much better chance of being met because the needs show up on the web sites of many local churches and ministries, not just one web site. Many more people who could potentially help will see those needs. Meet The Need also sends email notifications to those who are interested in helping families whose needs have been posted by their church or a local ministry.



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The screenshot shows the Calvary Baptist Church website with a search interface. The search criteria are: "I Want to Help a: Local Family", "Country: United States", "By Providing: Goods", "Zip Code: 33759", "Distance: 25 Miles", "Category: Infant & Maternity", "Sub-Category: PLEASE SELECT (All)", "Keywords: ANY WORD", "Date Range: -", "View: Public". The search results show 4 needs, with the first one being a stroller for a single mother with twins. The search results table is as follows:

| | Date(s) Needed | Description of Need | Recipient Information | Distance from 33759 |
|--|----------------|---|--|--------------------------------------|
| | 10/16/12 | Need: Stroller Description: Single mother is having twins. She is in | Recipient Bio: Single mother is having twins. She is in need to a | Distance: 16 Miles Zipcode: 33602 |

A Calvary Church member searching their web-site chooses to help a local family with small children. They quickly learn a nearby family needs a stroller. An instant connection is made.



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Meet The Need even has a call center so that when a person walks into a church asking for help, but the staff member doesn't have time to speak with them right then, they may refer the person to Meet The Need's prayer and help line. Their agents will take the call, hear their stories, encourage them, and pray with them if possible. We will also enter their information and needs into Meet The Need and assign that family to the nearest local church or ministry or to the one who referred them to the call center. The Key Contact at the church or ministry will get an e-mail saying that a new family has been assigned to their church and the organization can then follow up to speak with the family and (to the extent possible) validate the need. Until the church activates the family, their needs are not visible to that church's members or to any other church's members. If the church decides not to "keep" the family, they may simply "return" the family to Meet The Need and we will decide where to reassign them (or we may not reassign them depending on the reason they were returned to Meet The Need).

Privacy of families in need is maintained because no last names, addresses or personal information (besides a brief bio of the family) are ever shared through Meet The Need with anyone except for the Key Contact of the church or ministry that is helping that family. The option does exist for an individual who has been specifically authorized by a church to meet a family's needs directly, but even then only a first name and phone number is disclosed.



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There are no monetary needs in Meet The Need because their mission is to get people out into the community to serve in giving of their time, talents and belongings, not treasures. In addition, giving money is more subject to abuse by recipients and qualification of degrees of financial need is so difficult.

Each organization can even track all of the services and items it has provided during any time period to families in need through its Meet The Need Dashboard.

The screenshot shows the Meet The Need Dashboard interface. At the top, there are navigation tabs: Families, Scheduled Visit Management, Item Report, and Family Report. Below the tabs, there is a 'Date Range:' dropdown menu with options: Today, Last 7 days, Month to date, Year to date, The previous Month, Specific Date, All Dates Before, All Dates After, and Date Range. A calendar for July 2012 is displayed, with the 6th of July selected. To the right of the calendar is a 'Done' button. Further right, there are buttons for 'Export Current View' and 'Filter / Search', and a checked checkbox for 'Include Subtypes'. Below these elements is a table with columns: Provided, Hours, Pounds, and Dollars. The table contains the following data:

| | Provided | Hours | Pounds | Dollars |
|--------------------------|----------|-------|--------|---------|
| Money - Gas | 0 | 0 | 0 | 20 |
| Money - Utilities | 0 | 0 | 0 | 45 |
| Money - Rent | 0 | 0 | 0 | 20 |
| Gift Cards | 0 | 0 | 0 | 25 |
| Toys (Girls) - 0-2 Years | 3 | 3 | 0 | 0 |
| Toys (Girls) - 6-7 Years | 2 | 2 | 0 | 0 |

Easily exportable reporting is quickly generated based on date range, items distributed, etc.



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Ways to Recruit & Manage Church Volunteers

Through Internet Technology

Find out more about how to help families in need more effectively and collaboratively than ever before!

Call 813/527-0222 or email Info@MeetTheNeed.org.

Find Meet The Need Online



www.MeetTheNeed.org