

CASE STUDY

United Way of El Paso County

Nearly 100 year old chapter springs into action with pandemic response by digitizing intake & case management

The United Way is a charitable organization with deep roots in the evolution of community services in the United States. Started in 1887 by a multi-denominational group of dedicated citizens seeking to improve the lives of their fellow citizens, the United Way has grown into a nationwide organization with over 1,400 chapters and working with 34,000 community partners. Over the years, United Way has become a non-profit organization leading the field in their use of data-driven outcomes and sharing community impact transparently with the public, their stakeholders, and board.

United Way of El Paso County, located in Texas, has been providing wraparound support for the El Paso community since 1923 by connecting the most vulnerable to basic needs, promoting financial stability, closing educational gaps, and volunteer engagement. United Way El Paso County aims to create and support a thriving community by connecting its residents to programs and resources that serve their needs.

The Community Resiliency Center, or CRC, was created in 2019 - one of many of United Way's category-leading efforts in responding effectively to emergent community needs in a time of crisis -- in this case, the Covid 19 pandemic. As veterans

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of community service program administration, United Way El Paso quickly designed and defined their person-centered processes prior to standing up CRC. They knew they'd need a way for their team to receive client inquiries which can then be processed by Community Navigators who collect vital information and determine

eligibility. If eligible, the client works with a case manager who matches them with community resources.

Prior to launching Casebook in Spring 2021, United Way El Paso County and Angelica Mata Lindstrom, Director of Community Resiliency and the CRC, knew they would need a tool to help their staff manage cases. Lindstrom and the CRC were focused on

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creating, establishing, implementing, and executing key programs that deliver against driving resiliency, and with that, United Way El Paso County was looking for a way to track and manage the CRC's client intake process, case management process, and create a directory for the services and programs that could be offered to the community.

Enter Casebook. The team at United Way of El Paso County researched and evaluated

several solutions before landing on the person-centered, human services-native SaaS platform. Lindstrom and her team - including 2 Resource Specialists handling intake, 15 Resiliency Navigators handling the case management for eligible clients, a Community Outreach Coordinator, a Communications Coordinator, and their manager - required a solution that supports operations, offers a quick implementation process, and above all else, allows them to be data-driven. Notably, most other competitors did not cleanly delineate data between intake and cases, a strength of Casebook's modular approach to Human Services data:

“Our deciding factor was based on the structure and the way it works ...the separation...from an intake and a case. [In our organization,] a client doesn't become an eligible client until they move into the cb Engage application. [This separation between intakes and cases] allowed us to really distinguish which clients we're working with and which clients are still ineligible” said Lindstrom.

For larger or more mature organizations like United Way, data modeling and the separation of business concepts to create an accurate representation in reports to funders, their board, and the public is crucial.

Lindstrom and the CRC staff needed to be educated on the resources that were available throughout the community so that they could present these resources to their clients. Prior to implementing Casebook, the CRC team relied on a manual, pen-to-paper process to keep track of these resources, which led to discrepancies in the data. The CRC team is now able to leverage Casebook to store and track the resources that the El

Paso community offers. Lindstrom is now able to pull reports to analyze trends in client use of these resources as well which provides key insights into planning for the future.

Linstrom added, “[Staff members] would have different versions [of our resource directory] and Casebook helped create that cohesiveness or one source of truth, and provided the accessibility to access this directory in the field for our team.”

Since the implementation of Casebook, the CRC team was able to manage a caseload of 50% more clients than they initially anticipated. With the increased caseload, it's crucial for Casebook to provide the most up-to-date information to staff whenever or wherever they are. Casebook has enabled Lindstrom and her team to document and later refer to detailed information regarding their clients and the resources available to them.

Through the program and its efforts, the CRC surpassed its goals of providing

resource navigation to over 1,186 households (1,965 individuals) with 1,068 community referrals for rental, utility, housing, education, mental health, and more. The CRC was also able to provide over 857 courtesy referrals to 864 households; identifying the need for mortgage assistance and for broadening the eligibility requirements for our community members.

Lindstrom believes Casebook is a game changer. “We knew exactly how to approach their clients based on the information that they had [in Casebook]. Managing 40 to 45 individuals can be quite cumbersome. My staff need to make sure that they can review and access that data to have these effective conversations with their clients throughout the process. If I think of just the effectiveness of how they helped address housing stability within our community, there are many, many success stories. To sum up Casebook - it stores all our information in one accessible platform. Individuals can access what they need easily, whether it's looking into a specific case or pulling specific reports.”

About Casebook

Initially incubated by the Annie E. Casey Foundation, Casebook is a proven SaaS human services platform. Our technology solutions are the response to frustration among human services professionals and leaders who have struggled with antiquated information systems. As a result, Casebook PBC developed a configurable, intuitive, and easy-to-use software in close partnership with human services practitioners. Our solutions evolve with policy and practice in child welfare and human services to provide the best-in-class experience.

Want to Learn More? Let's Talk.

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