



“DOING CLIENT INFORMATION BETTER: THE SPRINGVALE CAAB STORY”

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INTRODUCTION AND SUMMARY

- Organisational Context
- My role
- Gathering of requirements
- Client Information: Current Situation
- Discussion task – situation
- Findings and Recommendations
- Proposed solutions
- Discussion task – solutions
- Lessons learned
- Next steps
- Questions



ORGANISATIONAL CONTEXT

- In operation since 1971
- 2 main sites: Springvale and Noble Park, plus out-posted workers
- 31 EFT paid staff and 50 + volunteers
- 16, 000 client services per year
- Majority of clients from CALD backgrounds
- Services:
 - Information, Referral, Advocacy and Support Service (IRASS)
 - financial counselling,
 - Employment services,
 - Youth housing support
 - Settlement services for new arrivals.
 - Community development and Outreach



MY ROLE

- Consultancy in records management
- Initial focus on client information, became broader
- Records management policies and procedures now part of role, as well as advice on ICT
- Focus at the moment on moving forward with ICT, including client case management and CRM



GATHERING OF REQUIREMENTS

- Requirements: analysis of flows of client information, data and reports
- Importance of requirements gathering
- Need to fit into other initiatives (e.g. management of groups, membership list)
- Implications for practice – don't just implement technical solution, need to look at people, policy, training and process factors



CLIENT INFORMATION: CURRENT SITUATION

- Client information in paper and electronic (in many systems, spreadsheets, individual's hard drives)
- Difficult to get picture of SCAAB as a whole
- Difficulties with tracking basic client information and data across sites, and generating reports
- SCAAB is still reliant on a paper index for its client registration.
- Difficulties completing and tracking referrals to internal SCAAB programs.
- Some teams do not have access to an electronic case note system.



DISCUSSION : PROBLEM SITUATIONS

- Before talking about CRM solutions, I would like you to turn to the person/s next to you, and have a quick discussion about a problem situation you have encountered when dealing with client information in your organisation, or where you have seen it in other organisations



FINDINGS AND RECOMMENDATIONS

- Need for a system to manage client information and data (contact and case information, case notes, reporting)
- Need for systems to support both paper and electronic information
- Separation of client and operational information
- Need for careful analysis and testing of solutions before purchase
- Need to consider low-cost options



PROPOSED SOLUTIONS

- A client case management solution e.g. InfoXchange SRS: <http://info.s2s.org.au/service-record-system>
- A free/low cost CRM, which can be customised e.g.
 - Sugar CRM: <http://www.sugarcrm.com/crm/products/capabilities/sales/contacts.html>
 - CiviCRM: <http://civicrm.org/aboutcivicrm>
- A CRM template on Sharepoint: <http://www.sharepointcrmtemplate.com/sharepoint-crm-info.asp>



DISCUSSION TASK: SOLUTIONS

- Talk briefly to the person next to you about useful CRM or case management solutions which you have encountered.



LESSONS LEARNED

- Define requirements
- Short-list solutions
- Test solutions with staff
- Have a decision-making process in place before you start
- Remember the need to change policies, procedures, to train staff etc
- Careful with timelines



NEXT STEPS

- Decision will be made early next year
- Implementation over several months
- Need to integrate the CRM with other reporting systems in the future



QUESTIONS??

- Any questions can be addressed now, or if you have further queries, please contact me via e-mail on rfrench@scaab.org.au

