



## Southern Family Life

### Improving case management

Southern Family Life, based in Melbourne, provides a range of services, specialising in the areas of family counselling and support, family violence prevention and youth family reconciliation.

Established in 1970 by a group of local residents concerned for the wellbeing of families, Southern Family Life serves the southern suburbs of Melbourne and has developed a comprehensive case management and reporting system.

#### Matching internal expertise to external needs

Southern Family Life service provision is based around effective case management and the belief that success lies in the ability to correctly match internal expertise to external needs. In 2003 to 2004, Southern Family Life responded to 1499 requests for help with family and relationship issues. More than 4900 participants have benefited from its family strengthening and community building programs.

Since 1996 the organisation has grown rapidly. It now has a staff of 33, with over 200 volunteers and a strong network of relationships with local businesses, schools and service clubs. Its annual income is about \$1.5 million, with funding provided from a range of government and community bodies. It receives in-kind support from local community partnerships, including donations of most hardware and software.

Southern Family Life wanted a case management system that reflected its client-directed service principles. It would integrate data collection and reporting with the service delivery process, and improve control over resource allocation and quality of service. It needed to be flexible and respond to changing business needs.

The system should be able to answer questions about what the organisation did and for whom, and how much it cost. Southern Family Life undertook an end-to-end process analysis of its case management, from the point of referral through the management of the case to the provision of reports to funding bodies. This approach was developed by the chief executive officer, Jo Cavanagh, who had a background as an ICT consultant.

In 1998, Southern Family Life engaged Infoxchange Australia to develop the first iteration of its case management system and then moved to internal development and refinement of the system as a partnership between service providers, the business



manager Paul Bunn and the IT coordinator Greg Storer. The original design was driven by the core reporting requirements of its largest funding body, the Victorian Department of Human Services, whose statistical and data requirements broadly matched those of its other funding bodies. Staff were very involved in the process to ensure that the design reflected the steps in service delivery and matched requirements of each stage. The system is under constant review to ensure not only that all relevant data is collected but also that it can be disaggregated for reports.

Microsoft Access was used to develop the system, where case management and allocation procedures allow an overview of the total caseload for the organisation or for individual case workers. It is used from initial contact, and allows cases to be allocated by email. Case workers can report online, and external reports can be made to funding agencies.

The system is not yet fully integrated because some data must be managed through distinct systems to meet government and other funding body requirements. In such a complex environment, organisations must develop systems that maintain overall integrity while remaining flexible.

### Benefits

The Southern Family Life case load management system streamlines processes from referral to reporting, providing improved management of the service as a whole and the flexibility to meet changing business needs.

The system has built up a store of data that may prove a rich resource for research. For example, it could be used to explore the relationship between interventions and outcomes, potentially providing evidence on the efficacy of different modes of intervention in particular situations. It could also be used as a basis for cost benefit analysis.

The organisation has developed a work culture based on best practice use of ICT. New staff are tested for computer literacy, and staff are offered regular ICT training. Increased familiarity with ICT has resulted in new services such as distributing donated computers to families in need.

Southern Family Life believes that as other organisations within the sector take up ICT there will be more cooperation on measuring the effectiveness of services. Currently the sector is reliant on information that governments choose to integrate and share. If a standard reporting format is developed,



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and if that information is collected on a sectoral basis, it would provide the evidence required to support more effective advocacy for the entire sector.

## Success factors

The strategy adopted by Southern Family Life would not have been conceivable if it did not have a staff member, in this case CEO Jo Cavanagh, aware of the advantages that ICT could bring. Knowing the possibilities, however, is only one of a number of keys to success. It is also important to:

- **Match systems to business needs.** It is essential to recognise that ICT is a tool, not a driver. The organisation's mission, values, and desire to deliver a quality service are the drivers, and a shared vision is crucial to the systems development process. Communications skills are critical, as is understanding work processes.
- **Form strategic alliances.** Southern Family Life has a policy of pursuing ICT developments through strategic alliances and partnerships. This not only reduces costs but spreads support for the ICT infrastructure, reducing its vulnerability to disruption.
- **Have technical support.** With case management fully automated, Southern Family Life would be at risk of severe disruption to its service delivery without good technical support. It first employed a part-time ICT coordinator in 2000.
- **Maintain data quality.** The case management system is now central to Southern Family Life's management of its services, so data quality is essential. The people who are responsible for the data enter it and Southern Family Life provides them with the support necessary to maintain quality.



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## Barriers

Cost has been an issue, dealt with through a mix of internal funding and strategic partnerships.

Small welfare organisations appear to be at a disadvantage when working with government. Governments tend to respond better to the financial needs of larger organisations, which were provided with financial assistance to facilitate Y2K compliance while smaller organisations were not.

The sector has few standards in place in terms of reporting requirements and there is no agreement on even basic definitions such as whether an individual or their family constitutes a case. As government changes its requirements, and the sector moves towards standardisation, the voice and capabilities of smaller organisations tend to be ignored. Changes involving systems modification can be expensive for small organisations.

Change management has also been an issue. This has partly been because older staff have not been familiar with ICT. Rather than viewing this as a problem, Southern Family Life seized it



as an opportunity. In addition to staff training, it hired two young ICT literate people to work in its office, to help use the system and to help others. This has worked well as a two-way process: older staff have benefited, while the new staff have benefited from the knowledge and experience of the older staff.

## Key lessons

- A small community organisation can successfully provide core services in competition with larger organisations, while contributing to local community building.
- An organisation should match ICT systems to business needs and develop strategic alliances.

## References

Southern Family Life website [www.southernfamilylife.org.au](http://www.southernfamilylife.org.au)

Help Online website [www.helponline.org.au](http://www.helponline.org.au)

# COMMUNITY CONNECTIVITY

## More information

In these case studies, communities, nonprofit organisations and groups share their experiences and lessons they have learnt using ICT: enhancing capability and service delivery; supporting and building communities, networks and connections; and overcoming barriers and challenges.

*Australia's Strategic Framework for the Information Economy 2004–2006* emphasises the need to ensure that all Australians can participate in the benefits of the information economy.

Key strategies in 2004–06 will be to strengthen collaboration and capabilities in nonprofit organisations, facilitate the creative use of ICT for building stronger communities and social cohesion, and develop networks, capabilities and tools to enable participation by people who are facing economic, geographic or social barriers.

**For more information visit the DCITA website [www.dcita.gov.au](http://www.dcita.gov.au) or email [community.connectivity@dcita.gov.au](mailto:community.connectivity@dcita.gov.au).**

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