

A Profile in Performance Management and Successful Change



JEWISH FAMILY SERVICE

ALL QUOTES COURTESY CATHY BARKER • CHIEF OPERATING OFFICER AND CHIEF DEVELOPMENT OFFICER

Jewish Family Service, Greater Dallas (JFS) is “an open door to those in need” and known as a one-stop shop for mental health and social services. People in the Dallas area of all backgrounds, religions, and income levels rely on them as a community staple and have for over 65 years. They also are committed to using a data-driven approach to assess their outcomes and impacts, and recently built a custom performance management system to fit their growing needs.

What they offer:

- Mental health, family violence, and special needs services for children, teens and adults
- Specialized social services to older adults
- Emergency assistance (financial help, food pantry, etc.)
- Career services programs

“I would absolutely recommend Exact Change Strategies to other organizations. I would tell them that you’re going to get a lot of value for your money, and you will have a better understanding of the product you’re buying if you use a custom implementation team like them instead of just the standard.”



Jewish Family Service of Greater Dallas

An open door to all in need

JFS, Greater Dallas is a nationally accredited 501c3 nonprofit. Right now, their annual budget is 5.4 million dollars.

They have 80 people on staff and touch over 11,000 people a year with their wraparound services.

An Upgrade

JFS was ready to upgrade their data system to capture their services more accurately and efficiently. Their old system was no longer keeping pace with their growing programs, and they knew a new data collection system could significantly improve their reporting to their stakeholders and funders. ►

“No matter how or why you reach us, we’re going to assess your situation and all areas of your life to see how we can help. For example, if you visit our food pantry, a case manager will meet with you to see what else is going on in your life- maybe you need help finding a job.”

“Before, our data collection was limited to counting heads and recording client sessions for billing. We had the same [data] system for 13 years. It had a lot of limitations, a lot of our clinicians didn’t like using it and, as a result, we were not accurately tracking all services as effectively. We still lived in paper files. We limped along – then realized there were more effective tools out there.”

“ECS gave the gift of insight beyond the scope of the project. They pushed us to learn our system and to grow our system.”

After researching the Social Solutions Efforts to Outcomes (ETO) software and exploring their options, JFS hired Exact Change Strategies (ECS) to target their goals by building a custom data and performance management system.

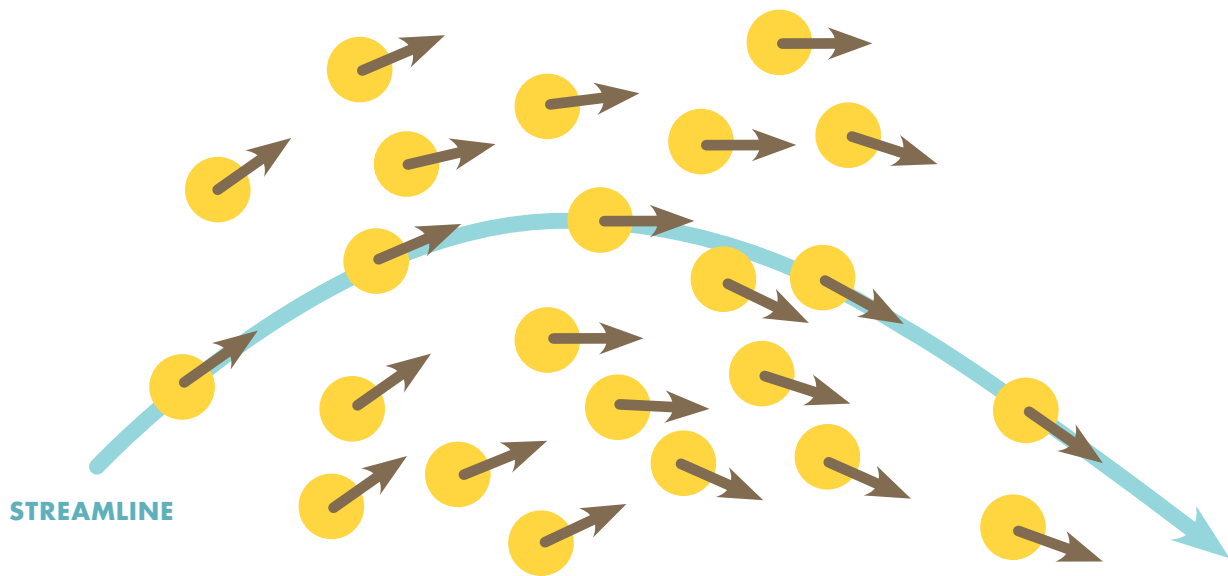


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In the initial stages, ECS interviewed the JFS leaders and staff to understand the workings of their current system and how their programs operated in community settings. It was imperative for ECS to grasp the real-world flow of clients through their services and opportunities to collect information along the way.

JFS did not just want to count the number of people served each month, rather they wanted to understand details about the results, outcomes, and impacts of their programs on the people they served. They also needed to be able to create intricate reports based on their data, which added to the value of tightening up their overall performance management process. ▶

“It was like a marriage made in heaven. [ECS was] able to come into our agency, learn it, and then help to design a system that works seamlessly. They were great teachers and provided guidance on multiple areas even beyond the initial scope of the project.”



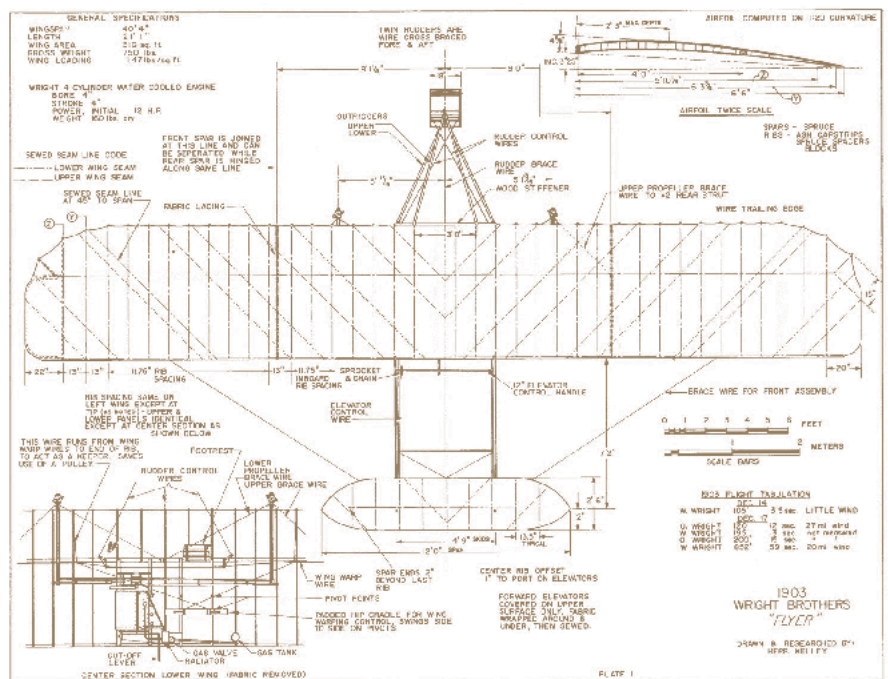
The Clarification Process

JFS worked closely with ECS to identify the priorities and outcomes important to them to finalize a blueprint for their new customized ETO system. Everything was mapped out by ECS before any work began to help JFS leaders and staff envision a smooth and successful change process. With this vision – along with ongoing guidance, encouragement, humor, and a can-do attitude – JFS and ECS formed a successful partnership.

Staff ambassadors from every major JFS service area played a central role throughout the system design and implementation process by providing guidance, feedback as well as receiving individualized training from ECS. As a result, they were highly engaged and committed to the success of the new ETO system.

Halfway through the project, JFS leaders realized that the new custom system would be able to do even more than originally planned. It was then that they started anticipating future needs such as creating intricate billing reports in ETO from the data they were collecting. They decided to put in a little more time enduring this process to invest in an even more powerful and responsive automated system. ▶

“There’s a ...better representation of the quality and quantity of our services to clients. We can demonstrate that to funders, the board, and community now.”



“[ECS leaders] are very personable, professional, and definitely experts. They know all the ins and outs [of ETO]. They’re fun too and have a very positive attitude about everything. ...They have a calming effect – reminding us it’s a marathon, not a race. They helped us let the process happen, and know it would all be ok.”

“We plan on a long relationship with ECS as we continue to assess and identify new ways to capture information and outcomes. We’re not done with them!”

Its Impact

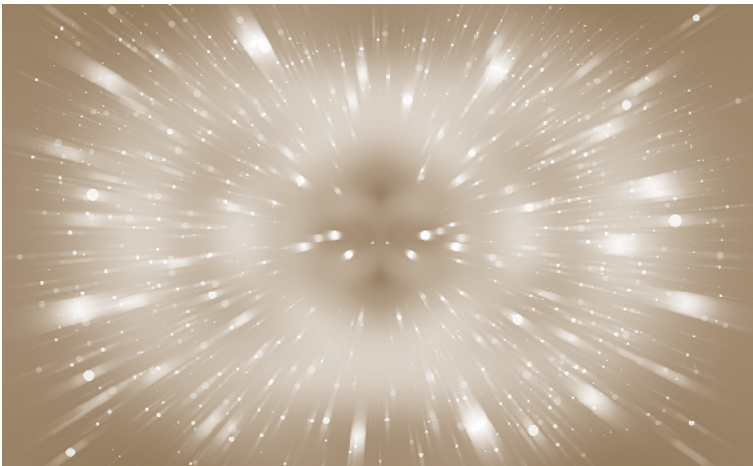
Within the first year with the new system, JFS realized dramatic results. Their data collection is now entirely paperless, leading to faster and more accurate information collection by their team. The new system allows them to capture a broader range of services that they had been previously providing but not counting, using this new cache of information in both in their internal and external services and communication.

Improvements They Have Realized Include:

- **Efficiency** – eliminated paper client files with monthly billing streamlined right in the database
- **Accessibility** – staff have efficient and convenient access to client records and reports all within ETO
- **Security** – Client data is held on a secure, backed-up database
- **Ease of Use** – Management and staff can readily monitor the exact same set of live data using the web-based database
- **Accuracy** – the new system now captures all of their services

Most importantly, the custom ETO system has room to adapt and grow. The most exciting part for JFS is that their new level of efficiency allows staff focus most of their time on their core mission of serving the thousands of clients that come through their doors daily for critical support. ●

See some of the outcomes they now can track on the next page. ►



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SPECIAL THANKS to Cathy Barker and everyone at Jewish Family Service, Greater Dallas

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OVER 10,000 LIVES TOUCHED

SPECIAL NEEDS RESOURCE TEAM

A UNITED WAY AGENCY

COMMUNITY PARTNER OF THE JEWISH FEDERATION OF GREATER DALLAS

NATIONALLY ACCREDITED IN ALL SERVICE AREAS BY THE COUNCIL ON ACCREDITATION

SERVING ANYONE IN NEED REGARDLESS OF RACE, RELIGION, ETHNICITY OR THE ABILITY TO PAY

SERVICES AVAILABLE ON A SLIDING-FEE SCALE, AS LOW AS \$0

OVER 40 COMMUNITY COLLABORATIONS

OVER 22,000 HOURS OF VOLUNTEER SERVICE BY 1400 JFS VOLUNTEERS

86%
Older Adult Services clients remained independent and living in their own homes.



67%
Career and Employment Services clients were able to secure a job within 6 months.



96%
Food Pantry Clients reported eating at least 2 meals per day and prevented hunger.



100%
Family Violence clients created a safety plan toward greater physical and psychological safety.



81%
Adult Mental Health Services clients showed improvement after treatment.



85%
Child Mental Health Services clients showed improvement after treatment.



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www.JFSdallas.org