

## Casework Management with Military Precision

Military service charities switch to online casework management, with the help of MSM Software

- **Bespoke online application developed to streamline processes, provide increased visibility for multiple agencies and reduce casework management resolution time.**

**Online Casework Management System adopted by Forces Charities' umbrella organisation, COBSEO (Confederation of British Service and Ex Service Organisations)**

- **Roll out planned through all military charities.**
- **Process time reduced substantially.**
- **Data collated used to access trends and set new standards – helping servicemen and women receive support faster and helping service charities to prioritise areas of need.**
- **Efficient, low cost, secure and environmentally friendly application.**

### Background to COBSEO (Confederation of British Service and Ex Service Organisations)

COBSEO is the umbrella organisation for some 165 Service charities and organisations including: The Royal British Legion; Royal Air Force Benevolent Fund, poppyscotland; SSAFA Forces Help; Seafarers UK; ABF The Soldiers' Charity; Royal Air Force Association; Officers' Association.

The role of COBSEO is to represent, promote and further the interests of all service and ex-service men and women of all ranks, their spouses and dependants by exchanging and coordinating information between its members, representing and supporting the needs of its member organisations at national and local Government levels, acting as a focal point for external agencies and identifying issues of common concern, particularly welfare matters and coordinating appropriate action to resolve them.”

### Challenges of a paper-based case management process

SSAFA (Soldiers, Sailors, Airmen and Families Association), a member of COBSEO, assists servicemen and women currently in the Armed Forces, together with Veterans from all three Services and the families of both. SSAFA caseworkers provide support by creating a case for each individual before submitting it to other charities, benevolent funds and organisations which offer assistance. Depending on the details of the case, financial, emotional and respite services can be provided – helping to improve the lives of those in need.

Back in 2002 the 'Form A' was introduced as a common form to ensure that all caseworkers documented the needs of their clients in a more consistent way,

across Service Charities. However, consistency was still an issue and the need for clearer visibility over the status of a case significant. In addition, due to the paper-based method used, forms had to be completed by hand, photocopied and posted to various trusts for funding consideration. With the need to pass these forms around numerous organisations in order to obtain the level of funding required, the process could take several weeks of going back and forth before a resolution was reached – potentially leaving those in need without the additional support required to enjoy an improved quality of life.

Due to the personal and financial information needed about an individual to create a compelling case for funding, confidentiality is a priority for casework and something which a paper-based method cannot consistently and reliably achieve. This, combined with postal delays and considering the advances in computer and internet technology, it was recognised that maintaining a paper-based system was not a long term option.

At this point, SSAFA approached COBSEO with the concept of switching to an internet based paperless method of casework management, for all Forces Charities. After identifying the potential benefits of working more closely together and sharing data using a secure online system, the COBSEO members agreed to sponsor a project to develop an appropriate solution.

### Weighing up the options

In order to address the problems of a paper-based method of casework management, the decision was made to invest in a technology-based solution and a tender was put out in 2007 to invite software design companies to submit proposals. There were eight proposals and a shortlist of three was created – including MSM Software. Although MSM was not the lowest cost option, the project team, led by SSAFA's then Project Director Gordon Lester (later Liz Joines) and Project Manager Jim Keeley, recognised the company's long standing history of creating bespoke software applications for charities and were impressed by MSM's credentials. Work began in February 2008.

Jim Keeley explains, "After reviewing all three of the shortlisted suppliers, the decision to partner with MSM was unanimous. MSM did not propose the cheapest option but with such a major and significant project, with the potential to dramatically improve processes, MSM's ability to deliver a robust, reliable and functioning solution within time and budgetary constraints represented the best value for money. We were impressed with MSM's considerable experience working with third sector organisations and felt confident from the outset in MSM's ability to understand our specific need and work in partnership with us to develop a bespoke solution to meet our unique requirements."

The COBSEO charities required a robust, web-based application which would be highly secure and easily accessible by all organisations, employees and

volunteers. Usability was also a consideration as many of the end user volunteers have limited or no experience of using computers. With up to 7,000 end users from potentially over 150 separate organisations needing to access the application, from a number of computing environments, it was important to provide a secure, reliable and resilient hosted service - to ensure downtime was kept to a minimum.

To make sure the application was as easy-to-use and effective as possible, the COBSEO charities created a working group (made up of representatives of the charities, volunteers and employees) to work alongside MSM's development team to define business requirements, design and test the application. This close involvement of the representatives from the COBSEO charities ensured the end product met the business requirements and was practical to operate.

Jim adds, "From the outset, and throughout the development process, the users have been at the forefront of the Casework Management System's design. Moving towards an internet based method of casework management is a major cultural change for our organisations and one which we knew would only be successful with involvement of the users every step of the way. To encourage take up of online casework management, we worked with MSM through the project phases during which users had the opportunity to feed back on the application's functionality, ease of use and accessibility. The development team at MSM was then able to tailor the system accordingly and in doing so create a solution that best met users' needs."

## Reaping the rewards

The Casework Management System went live in April 2009 and, as of January 2010, was rolled out across 30 branches of SSAFA, six County Offices of The Royal British Legion and 64 Assistance Providers. To date the system has over 700 registered users and has facilitated over 1100 cases. The benefits are already being noticed relating to the time taken to process cases. Examples of these are detailed as follows:

- Annuities paid to clients - 2 weeks down to 2 days
- Payment of priority debt – 2 weeks down to 4 days
- Response to one assistance request in 12 minutes

In addition to a substantial reduction in the time taken to process individual cases, other benefits of migrating to an internet based casework management process include: a single version of the case (i.e. one case one record one statistic) instant visibility for all organisations involved, easier workload management, case version control and a huge leap forward in terms of information security. In addition, the cost and environmental impacts of removing the heavy reliance on paper forms, photocopying and postage are substantial.

Thomas Coles, managing director of MSM Software, comments, "The COBSEO charities are in a unique position with a very unique need. So, an off the shelf solution would have yielded few benefits. We needed to build a

solution around a specific user base and help our clients implement a culture of change amongst their volunteers and employees, where technology is embraced to save time and resources and improve service delivery. Our team did a tremendous job working collaboratively with the COBSEO project team to deliver successfully.

“The long-term benefits of implementing our bespoke solution will be significant. Our client organisations are already seeing an 86 per cent reduction in the time taken to process an annuity case, which is proof of the system’s potential to improve processes and ultimately services offered to the thousands of people reliant on the support provided. Ultimately, we only feel we’ve added value if our client’s objectives are met, and in this case that means helping needy people who deserve wholehearted support.”

## Looking to the future

COBSEO, working in partnership with MSM, has plans to make the Casework Management application accessible to the various civilian charities that regularly provide funding to support the work of the forces charities. This would not impact upon the confidentiality and compliance requirements as the Casework Management System has been designed with appropriate security built in.

Looking ahead, the priority for the COBSEO charities is to manage a cultural change amongst the case workers and their member organisations in order to increase user uptake. Widening the user base and making general computer training a priority will help to ensure that the case-working process is as quick, efficient and cost effective as possible. Equally, COBSEO is keen to embed the system into the caseworking process across their member organisations and highlight the fact that the application is not just an online form filling process, but a system of joined up working that has the potential to make a big difference to the lives of clients.

In addition, COBSEO has plans to use the data collated on the new system to assess trends and develop statistical reports, which can be analysed and used to set standards and improve service levels.

The Casework Management System also has the capacity to be used to further streamline charity processes including more efficient payments, speeding up service verification and providing an online reference area for users - which could house handbooks, procedure guidelines and external websites. MSM will continue to work in partnership with COBSEO to provide additional functionality and support.

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