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> Bowman Systems Case Study Heart of Texas and Central Texas Areas on Aging



> The Conclusion

Smith and Jones both said agencies around the country would do well to look at their experience with Bowman and its products. "Bowman Systems' Founder and President, Robert Bowman himself came down for the negotiations," Smith said. "I was just extremely impressed with him and his character. He just emanates integrity. And every concern we raised during the contracting process he immediately addressed to our satisfaction."

Smith, who has also acted as a consultant on human services software, said he is also impressed with Bowman's ability to quickly translate field knowledge into software that works.

"I always thought one of the big mistakes a lot of software companies make is they don't spend a lot of time with the end users, and unless you spend a

lot of time with the end user you are more than likely going to develop a product that is not going to be accepted," he said. "But with Bowman we have made quite a few suggestions and every one has been incorporated. In a way we feel like we are co-developers."

"But anybody can develop software," added Smith. "The big question for me is can they stand behind it. Is the organization stable enough financially and does it have adequate personnel to provide the support when it's needed? For me that was the primary factor in choosing Bowman over all the other alternatives. I felt they were a stable company and customer service is their top priority."

"This is a totally new paradigm when it comes to social services," said Smith.

> Heart of Texas AAA

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> Quick Facts

Agency duplication ended.

Accountability sharpened via real-time tracking and sharing.

Timeframes compacted: assessment to follow-up reduced from five days to one.

Client data secured but now accessible.

Consumers getting better care, faster.

Unresolved needs data now being gathered, which will bolster funding.

Cooperation between agencies greatly increased.

Consumers better informed, less frustrated — fewer dropouts.

> Executive Summary

Two progressive social service agencies – the Heart of Texas and Central Texas Areas on Aging – initiated a search for a software solution that would seamlessly link agencies while ensuring absolute confidentiality and provide for better, faster client care.

> The Challenges

"A lot of agencies are competing for diminishing resources," noted Donald R. Smith, Director of Health and Human Services for the Heart of Texas Council of Governments. Looking down the road, Smith knew there would be pressure from the state, and from the federal level as well, to work more closely with other agencies so that every dollar could be applied as wisely as possible. But how? The agencies were desperate, and the wide-open geography of Texas didn't help. The challenges continued. There was no method of being centralized and too often, consumers would give up in frustration before getting what they needed. Services, in short, were fragmented, sometimes duplicated and confusing to consumers. And real-time aggregate data on unresolved needs simply didn't exist.

> The Agencies

The Heart of Texas Council of Governments (HOTCOG) is a six-county voluntary association of more than 80 local governments. HOTCOG does many things for many different people. It is the area agency on aging and the area information (211) center. In addition, HOTCOG played a leadership role in the creation of the Heart of Texas Regional Access System (HOTRAS), a partnership of 23 state and non-profit organizations committed to improving access for persons in need of health and human services.

The Central Texas AAA faced similar challenges. A division of the Central Texas council of government, it covers seven counties, serving the over-60 population. Much like Heart of Texas, it offers an array of services, including information and referral, care coordination, ombudsman services for nursing homes, congregate meals, benefits counseling and more.

> Searching for the Solution

Sandra Jones, a certified information and referral specialist for Central Texas, put it this way: "We were looking for a system for tracking clients - but an interactive system so we could share information within our own agency and with outside entities to prevent duplication. We wanted to streamline the process in the simplest manner we possibly could."

Her agency looked at several companies, also factoring in ease of use, cost and one of her biggest concerns - security. In the end the list contained only one name - Bowman Systems.

"After our initial discussions we were really satisfied as far as the security issue was concerned," said Jones. "We sat down with the people from Bowman and played with a demo and saw the software had the ability to meet our needs. And we saw customization features that applied beautifully."

For Smith, a central issue was sharing.

"We wanted something that could be used as a call center and also a Web-based system that would allow the agencies to exchange information in a secure environment," he said.

Smith and his agency started shopping in the summer of 2001. "We did a very deliberate analysis of what we considered to be the best products," he said. "We set up a grid and did it the right way. It was not just four or five people we had to sell on the idea, it was the entire HOTRAS Leadership Council - 23 organizations."

Again, when the search was complete, there was only one company standing - Bowman Systems.

"We felt it was the best thing on the market," said Smith.

> The Solution ... Found

Heart of Texas and Central Texas both implemented Bowman's flagship products, ServicePoint and CommunityPoint. Both are Web-based, easy-to-use, reliable, absolutely secure and flexible enough to meet the needs of all the agencies under the umbrellas of Heart of Texas and Central Texas.

> The Results

Both agencies describe better communication, greater efficiency and cost savings - but over and over, they come back to describing how clients are better served.

"Before, many people fell through the cracks," said Smith. "People would get referred from one agency to the other. They'd be going through what must have seemed like an infinite number of referrals and phone calls and assessments, and a lot of times they just gave up before they got the service they needed."

Now with Bowman, Smith said clients are assessed once, referred correctly the first time and followed in real-time all the way through the process, so that all agencies involved can get a fast and secure look at the progress. Accountability is important, Smith said. Now he has it.

The geographic area covered by Smith's agency has a population of about 300,000, and more than 25,000 have utilized the referral system in the two years it's been running. "That is pretty significant when you consider the size of the population," said Smith.

"It was difficult for agencies to know what was going on with other agencies, what they were offering," Smith added. He said ServicePoint and CommunityPoint make it easier for agencies to share their information with each other, as well as with consumers. "It gives the agencies the tools to know who to refer to - and now we can follow them to make sure they're getting what they need," he said.

From a funding perspective, Smith said ServicePoint will take its users to the next level.

"This was part of our vision," he said. "We wanted to use ServicePoint to determine what the aggregate unresolved needs are in our communities so as a partnership we could pursue funding rather than each of us doing our own thing. And we have already gotten some really good data."

Further, Smith is gratified to see that the agencies are now working more in a spirit of cooperation. He said about 40 percent of the agencies under the Heart of Texas umbrella are using ServicePoint exclusively. The primary reason the others are not, he said, is they are under mandates to use other systems.

"What I really like is we're all working together unselfishly to meet client needs," said Smith. "It's a much more selfless way of addressing the needs of the community. We just put all the turfism on the table and got it out of the way. Now we have a vehicle for accountability and not only that we have the unresolved needs data, so we can pursue additional resources with real evidence."

"Before, a lot of this was going on over the telephone," Smith said, "but a lot of times people don't answer the phone for whatever reason. Maybe messages sit on their voice mail for days. And a lot of this was going on through on fax machines. Both of those

systems are less reliable and less secure than using Bowman Systems to share information."

Jones of Central Texas said people are simply getting more help faster. One dramatic example: paper forms have gone digital, with the result being that the process of assessing, referring and follow-up has been shortened from five days to one.

"We're absolutely getting better coordination of care," said Jones. "Now we share information with other agencies so they don't have to do the same things over and over."

"People would get referred from one agency to the other. They'd be going through what must have seemed like an infinite number of referrals and phone calls and assessments, and a lot of times they just gave up before they got the service they needed."

After nine months of use, Jones said, she is more convinced than ever about the strength of the security and usefulness of the other features. Seven partner agencies use ServicePoint for bed management at shelters and independent living centers for the disabled, general client tracking, information and referral, and more.

"ServicePoint has really changed things," said Jones. "The funding dollars are being cut and we want to make sure every dollar is used to the very best that we are capable of doing - and if you are cutting down on staff time and ending duplication and doing things faster, you are going to get more from your funding dollars."

Added Jones: "Bowman has been at our disposal for any questions we have had. It has been a great working relationship. They have been very supportive."