Lessons Learned from the Bundled Services 

LCG 

Community Action Partnership Convention 
August 2017
Who we are

- 18 agencies
- 1 state office
- 2 state associations
- 3 Subject Matter Experts
  - Garrett County Community Action Committee, MD
    - Duane Yoder, President
    - Gregan Crawford, VP of Strategic Initiatives
  - Mary Virtue, Cornerstone Consultants
Why do agencies want to bundle services?

01
Help people to achieve self-sufficiency and address poverty
- Long term process with ups and downs
- Multiple areas to address
- Multiple applications are not customer-friendly

02
Become more efficient

03
Integrate resources of agency and community
What does bundled services look like?

- Customer focused
- Based on a relationship between staff member (titles vary) and family or individual
- Intake/assessment/application process to set goals and identify services
- Tracks progress against these goals determined by the customer
What does bundled services look like (Cont.)

- Timeframe is years
- The bundle of services varies from one agency to the next
- Services may be delivered by the agency and/or its partners
- Technology has made tracking services and documenting progress easier
Some lessons we have learned

- Bundling services responds to what CAAs know about the causes and conditions of poverty.
- This is not a new strategy for Community Action. Many have been doing this for decades.
- Accountability helps to keep people on track on what is a long journey for many.
- Skills and training of staff person are critical for success.
What evidence of impact have we seen?

- Research on the Centers for Working Families Initiative
  - When services bundled, 3 to 4 X more likely to achieve major economic outcome than non-bundlers

- Central New Mexico Community College
  - Students who received bundled services had a 61% change of achieving a short-term economic indicator (staying in school or receiving a scholarship) compared with 16% non-bundlers
What evidence of impact have we seen? (Cont.)

- Community Action Duluth
  - People in 1 service - 13% show positive outcome
  - People in 2 services - 45% show positive outcome
  - People in 3 services - 77% show positive outcome
What evidence are we seeing of added efficiency?

- Costs go down due to increased enrollment and program efficiencies
  - One site in Baltimore found that annual cost per client decreased from $2,280 per client in year one to $1,031 in year 3.
One big hurdle

Different funding sources, data systems, and measurements for success

Community Action Agencies in Missouri report to 13 different data systems on average
What we plan to do today

- Presentations and questions
  - Enrichment Services Program, Inc in Columbus GA
  - Community of Care Douglas County CO
- Discussion about what are the key success factors for bundled services
- Your challenges and roadblocks and the panel’s thoughts about how you might move forward
MOVING FAMILIES to SELF-SUFFICIENCY

Enrichment Services Program, Inc.  A Community Action Agency
Why Did We Begin This Journey?

• Unified Focus and Approach
  ➢ ESP Customer vs. Program Customer
  ➢ “Them” vs. “Us” Mentality
  ➢ Greater/Better outcomes for families
Desired Destination

• Fully integrated approach
• Effectively move families to self-sufficiency
Key Ingredients

- Champions
- Key People
- Discussion about program “cycles”
- Focus on the Agency goal
Key Ingredients

• Unified Tracking System
• Central Intake
• Target Customers
• Shared Vision and Explaining the “why”
Key Ingredients

- Written Procedures
- Joint Meetings
- Internal monitoring
- Feedback from staff
- Ongoing communication
Where We Were

• We heard the following comments:
  – “We are doing their job”
  – “These are our customers”
Steps Taken

- Case Manager’s Retreat
- Development of procedures
- Joint Trainings
Current Focus Area

Implementing a systematic approach to identifying bundled services that families are eligible for when intake is completed
Next Steps

• Finalization of Bundling Services Report
• Refining Procedures
• Ongoing development of monitoring tools and processes
• Partner information/data to reflect collective impact
Provision
- Case Management: Determination
- Outcome: Delivery
- Data: Eligibility
- Bundle: Core services
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- **Case Management:** Determination
- **Outcome:** Delivery
- **Data:** Eligibility
- **Bundle:** Core services

**Navigation**
- **Case Management:** Connection
- **Outcome:** Access
- **Data:** Service records
- **Bundle:** Need based
**Prescriptive**
- **Case Management:** Directed
- **Outcome:** Completion
- **Data:** Planning
- **Bundle:** Domain based

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**Generative**
- **Case Management**: Engagement
- **Outcome**: Change
- **Data**: Change
- **Bundle**: Customer selected
Partnering together to provide transformational opportunities to the vulnerable residents of Douglas County.
TRANSFORMATIONAL

Capacity & Capability
- Time Mgmt
- Organization
- Therapy
- Financial Health
- Job Training
- Education

Wrap-Around Engagement

UNIQUE

Stability
- SNAP
- TANF
- Medicaid
- Shelter
- Domestic Violence
- Child Welfare

Opportunity
- Housing
- Child care
- Employment
- Transportation

UNIFORM
Keys to Success

- Leadership
- Resource Dedication
- Communication
- Collaboration
- Customer-Centric Approach
- Policies/Procedures
THANKS!!

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EVALUATIONS

The Partnership Wants Your Feedback!

Please be sure to complete the evaluation for this session online, via the CAPCON17 Event App.

Thanks in Advance for your Cooperation!