

value?, ask instead, What is our true genius and what are our core competencies? If you know what you're great at, where the gaps are in the marketplace, and what the customer considers valuable, you have the beginning of entrepreneurial fever.

#### THE JEWISH FAMILY SERVICE AGENCY OF THE FUTURE

The Jewish Family Service agency of the future will have multiple sites with a home base for administrative purposes only. Every synagogue, day care center, preschool, personal care home, nursing home, Jewish day school, and Jewish Community Center will be our domain and may have JFS professionals on site providing tailor-made programming for parents, children, and elders alike. We have too often given away these services for free. The value-added services that we provide to member establishments are now recognized as an essential component of the lifestyle choices that these institutions market to their members. These services should be self-supporting and even more lucrative as they feed referrals into our systems.

Because the Jewish Family Service agency

of the future is going to have to make up for deficits in traditional funding, it will have to confront another truth: THERE CAN BE NO MISSION WITHOUT MARGIN. And what's more, this margin must come from our own making.

It is for this reason that the JF&CS of Atlanta has, for the past three years, embarked on developing entrepreneurial readiness to confront the mission-money matrix model for all of our programs. The results have been pleasant surprises. Two programs—Adoption and Respite—have been spun off into “for-profit” business models, and two more may join them soon. This process has provided the impetus for grantsmanship, endowment, and focused marketing that have enhanced revenues, profile, and market niches.

While the AIDS pins and auto safety kits that we have trademarked and sold have been profitable, they are nevertheless products with a limited shelf-life. What each of us has in our own backyard is a cohesive array and mastery of skilled services that consumers will pay for. Doing the research and embarking on the entrepreneurial process will lead each agency to discover its unique answer and pathway.

## BUILDING OUR COMPUTER BRIDGE TO THE 21ST CENTURY

### Lessons Learned for the Jewish Family Service World

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*In addition to serving the needs of central administrative and support staff, computer technology, through the use of an intranet, can support caseworkers both directly and indirectly. There is growing interest in Web sites for Jewish Family Services, and every agency should be preparing to go online.*

In the beginning, computer technology in the Jewish Family Service (JFS) environment was viewed as either an imperative or a curse, and eventually as a mixed blessing that the leadership and staff would ultimately have to face. By now, almost two decades later, an informal survey of agencies across the country makes it clear that virtually all JFS executives agree on the need to fully integrate technology into the way we do business. The differences among agencies lie in their abilities to harness the human talent and capital resources required to automate, network, and place a computer on everyone's desk.

Where all this use of computers is leading no one really knows. Thomas Edison thought that the primary application of the phonograph would be dictation. The foremost scientists in the country believed that the telephone would eliminate Southern accents in American speech due to “homogenization” of the population.

What we *do* know after two decades of experience is that the multigenerational process of cultural transformation from a manual to a computerized way of working continues. As a network of family-serving agencies, we have to varying degrees embraced computerization in two major dimensions of our work: administration and client services. Both applications are addressed in this article, with an

emphasis on what has been learned and on implications for future directions.

Computerization in this field was first and is still primarily used for administration. Technology, when used well, allows a relatively small, centralized staff to keep on top of enormous amounts of useful data from many sources. At Jewish Family and Children's Services (JFCS) in San Francisco, we have had a history of employing “near-cutting-edge” technology to support programs of service, largely to the credit of a few “techies” on staff who were passionate about the new computer revolution and who brought the rest of the staff along for the initial ride.

At various points in its history, JFCS has implemented computerization to streamline production of documents, improve budgeting and handle accounting, maintain mailing lists and contact lists, simplify payroll, expedite client billing, gather and use demographic and service data about clients and staff, and facilitate the agency's development and fund-raising efforts.

Until recently, our use of computer technology was limited by several factors, including the high cost and technological difficulty of connecting computer systems at the agency's various branch locations and of providing direct computer access to dozens of clinical and casework staff at their desks. As a result,

although computerization has become extremely helpful in serving the needs of central administration and support staff, it had not truly served casework staff or clients directly.

Fortunately, recent trends are making it practical for JFCS to create an intranet through which databases can be shared. This intranet allows casework and other staff throughout all our branches and programs to view and modify data directly, subject to strictly enforced authorization rules. Not only is an intranet efficient and cost effective but it also has the potential to transform and improve the relationship between direct service staff and the agency's management information systems. The computer is becoming a tool that provides information on demand to staff, rather than primarily demanding it from them.

Many concerns and challenges need to be addressed, especially with regard to protecting confidentiality of client data, yet none is insurmountable. Our experience demonstrates that computer technology in the social service workplace can better support the casework staff both indirectly and directly, and, most importantly, the clients and community we exist to serve.

#### COMPUTERIZATION: PHASE I

From the time we bought our first machine almost two decades ago, our agency has maintained a firm commitment to using computer technology to achieve its mission. In the process, we also learned that there are no shortcuts and that the learning curve of effectiveness and efficiency takes place "in fits and starts."

Our philosophy has been to not necessarily be the very first or the very best. Rather, our approach is to take advantage of the rapid pace of advancing technology by learning from early adapters and subsequently applying their learning to our environment. Over time, we have learned when to wait for the technology to come to us and when to custom-design a system for our exclusive use.

The first four major functions to be computerized both at our agency and in most similar institutions around the country were

fund-raising, accounting, communications (i.e., word processing), and management information systems.

#### Development and Accounting

Given the growing need to become more self-sufficient and diversified financially, it was obvious that we had to develop the administrative ability to conduct sophisticated fund raising. The implementation of a major database application for our new Development Department was an interesting example of waiting for developing technology to come to us.

It would have been possible to hire consultants to create a custom application for JFCS's fund-raising needs as early as 1984, but this was not done. Instead, the agency "limped along" with a very limited system, cobbled together internally by staff, while various commercial products were reviewed and evaluated. Eventually, by 1988, a product called "Fund-Master" was identified for agency use. Staff were convinced that it would be able to meet agency needs for years to come, without the need for expensive custom software and—perhaps even more important—without the risk of the agency becoming dependent upon an untested, unsupported, and inflexible custom application.

The agency has benefited from the gradual improvements and enhancements that have been offered by "Fund-Master" over the years as our database has grown from 250 to 25,000 names. Although sometimes we have had to compromise on features that in a perfect world we would insist upon, we have found that software developers generally respond, sooner or later, to the pressures exerted by users like ourselves. So, just as the volume of data entry in our Development Department reached the point where it could not be accomplished from a single terminal, the "Fund-Master for Networks" upgrade became available.

A similar situation applied in the Finance and Administration Department, where computerization had to be delayed for several years because the "shrink-wrapped" accounting programs on the market did not offer the

ability to administer multiple restricted-use funds, a need that is apparently very unusual outside of nonprofit organizations. Eventually a software package (Computer Associates' Accpac) was selected, and we have stayed with it while monitoring its competitors, acquiring additional modules and upgrades as needed.

#### Management Information Systems

At the other extreme from the ready-made development and accounting systems is our Management Information System (MIS), a highly centralized management system originally custom-designed in 1986 for JFCS by consultants affiliated with the University of California. It is maintained off-site, accessible via a dial-up connection from the JFCS Finance and Administration Department office.

This system has been an enormous success. Client billing, including billing to dozens of insurance companies and managed care companies, has been simplified greatly. Monthly reports on caseworker activity are provided to supervisors and central administration, enabling the agency to calculate key benchmarks—such as treatment outcomes or the true cost of providing an hour of service in a variety of programs—that were only good guesses or episodic analyses before.

From the perspective of the caseworker, however, this computerization was not entirely a godsend. In many ways, it made the data more distant from them, actually imposing barriers between them and the information they needed. For example, rather than look up a new client name in a single card file, caseworkers had to check multiple printouts and then consult with the MIS Coordinator in order to verify that a client did not already have an open case on file. With some exceptions, it was only the MIS Coordinator who directly "talked" to the MIS database, and that interaction consisted almost entirely of data entry, preparation of bills, and printing out of standardized reports.

As is often the case with the computerization process, there were unintended results.

In many ways, the new system simplified data retrieval and billing for the caseworkers. But there were some ways in which it did the opposite. Common tasks, such as preparing a check for a client or inquiring about balances owed and payments received, now actually took longer and required more steps than under the manual system.

When complaints from staff increased in volume and frequency, it became clear that the in-house computerized systems needed to enter the next stage of development. We had to respond better to the needs of our staff in order to make their jobs easier. We have tried to do just that, as our computerization efforts with regard to caseworkers entered a second phase (Table 1).

#### COMPUTERIZATION: PHASE II

Both by design and by necessity, the initial MIS created in our agency and in many other comparable agencies throughout the country first had to serve the critical needs of agency management and administration. Yet, as Table 1 indicates, the time then came to better support our "internal clients"—our direct service staff who do the lion's share of the work. When asked how technology could help them work better and smarter, casework staff made the following additional suggestions for what a system should do.

##### Instant Intake and Client Information on Demand

When a potential client calls, the intake caseworker should be able to begin collecting information immediately and easily. Having an on-screen form into which client information can be entered is a great convenience.

Ideally, as the form is being filled in, the computer is working "in the background" to try to identify the client and suggest a possible match to an existing case record. If found, this information can be verified with the client, and instantly the caseworker knows much more about the situation.

Not only does this use of the computer streamline the intake process, but it also avoids

Table 1. Computerization and Caseworker Tasks

| Task                                                | Manual Procedure                                                                                   | Phase I:<br>Computerization                                                                                                                                                                               | Phase II:<br>Computerization                                                                                                                                                   |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Finding out basic client information                | Look up name/ birthdate in card file                                                               | Visit Accounting office, look up in printed list. If not found or if off-site, ask MIS Coordinator to research.                                                                                           | Enter name into computer terminal on desk. If needed, search by birth date or other known data.                                                                                |
| Obtain a check for a client                         | Each one prepared by hand. Takes a few hours or days, depending on urgency                         | Most checks batch-prepared and mailed twice/week. Urgent checks require special approval procedures.                                                                                                      | Automated approval procedures enable all checks to be processed immediately, with needed approvals provided online by the most accessible person.                              |
| Charge a client for time spent on his or her behalf | Make an entry on a billing card                                                                    | Fill out a line on a weekly activity form, including client name, case number, day and time seen, type of service provided, etc. Send form to MIS Coordinator, who enters data into computer for billing. | Enter data on a screen, check "yes" for billable. Click "OK."                                                                                                                  |
| Prepare a letter                                    | Dictate or hand-write a draft, give to a secretary to type final copy. Make corrections if needed. | Dictate or hand-write a draft, give to a secretary to word process draft copy, then edit and revise until perfect.                                                                                        | Dictate using voice recognition or word process a draft, e-mail to support person to revise into final form. Edit online and then have support person print out for signature. |

having to ask the caller to provide information he or she has previously provided and it allows the caseworker to identify the status of the case, its billing status if applicable, and who is or was the assigned caseworker. If it is a new case, the information gathered becomes the basis for a case file and ideally should never be asked for or entered again.

An important side benefit of instant intake is that it enables the tracking of "information and referral" calls and inquiries that never become cases. One of the great concerns in many agencies like ours is how many potential clients are lost or go away unsatisfied after their first contact with the agency or express a need for services we do not provide but possibly should.

#### Identifying Resources

The staff of our agency and many others are increasingly called upon to help clients find the resources they need. And although end-

less memos, leaflets, briefings, and training on resources are provided to staff, the overwhelming amounts of information can only be managed, updated, and accessed through the use of computers. No caseworker can be expected to keep all this information in his or her head. Telling a client that you will have to do research and get back to them is necessary but often unsatisfactory. Providing caseworkers with immediate access to a state-of-the-art database of helping resources is enormously helpful in improving client services at a time when staff efficiency is at a premium and quick responses are expected by our constituencies.

#### Networking—Building Relationships Among Systems, Staff, and Branch Offices

For some time the agency sought to integrate the Finance and Administration Department functions at our headquarters in San Francisco with the work performed by the case-

work and administrative staff at our 15 branch offices throughout the San Francisco Bay Area. Options for wide area networks using leased lines and proprietary networking technology were considered, but the cost was always extremely high, and the number of organizations comparable to ours that were using such systems was very low.

However, during the last year, something like a standard for enterprise-wide networking has appeared called an intranet. An intranet is simply a wide area network that uses the same phone and network lines—and the same networking protocols—as the Internet.

In short, setting up the kind of network that will create easy relationships between our administrative and direct service staff is now within reach. The software is no longer arcane or experimental. We can buy it all retail, at reasonable prices, from well-known and reliable vendors, and we can even hire personnel who have experience using systems just like it. Even most of our concerns about data security and confidentiality have by now been explored in detail by bankers and other data-critical users, and "firewall" technologies now exist that can encrypt and insulate our confidential data from the rest of the Internet traffic with which it will travel.

Using an intranet, staff at branch offices can directly enter and retrieve client and billing data (as authorized), directories of staff and volunteers can be updated and immediately shared agency-wide, and master lists of resources can be created and maintained for the entire organization.

To an extent never before true, the situation is very much "if you can dream it, you can do it." The challenge now is largely one of identifying how we would like our system to work. How should the networked terminals "look" to the user? What capabilities must they have?

After that, all that is required is to develop specifications about size, speed, and reliability standards, and we will be up and running as soon as we like—or at least as soon as we can pay for it all, which is no small obstacle for

chronically underfunded JFS agencies.

#### CHANGING EXPECTATIONS IN THE SOCIAL SERVICE WORLD

The new intranet standard did not come about by accident, of course. It arose because of the explosive popularity of the Internet, which has done much to change the way nontechnically oriented people view computers. Whereas ten years ago most social service professionals would have been horrified or hostile at the idea of having to use a computer daily in their offices, today's clinicians are generally excited at the prospect, indicating that a cultural transformation in staff attitudes toward technology has indeed taken place.

However, that excitement stems from different expectations of computers than many staff had in the early days. Today a computer is not just a machine with which staff members are required to work or a toy to play with. Rather, it is a resource that gives us needed information on demand and that connects us to other people, other places, and other resources that actually help us do our jobs.

Staff today are more comfortable with the jargon of using computers. Filling out a form on a Web page is a more familiar task. People know how to move from field to field, how to use "drop-down" lists and "pop-up" help screens, and how (and why!) to review the data they have entered before clicking on the "submit" button. Most staff also have expectations about forms: that they will be designed to be clear and easy to use, that they will use those "drop-downs" and "pop-ups" to minimize the number of keystrokes needed to complete the form, that they will reject incomplete or impossible data, and that they will provide positive feedback when the data submitted have been accepted.

Our staff are now ready and able to handle two new ways of working from their desktops: direct networking with centralized databases and serving clients directly. Not by coincidence, this change in how social workers work is taking place at the same time that the new technology is becoming available to them

## COMPUTERIZATION AND CLIENT SERVICES

The general public, including our clients and our community, also have changing and heightened expectations about our agency and technology. It is largely to be able to meet those rising community expectations that our agency has developed its own Web site and Internet presence.

Beginning in 1995, JFCS participated in designing and launching one of the first national Jewish communal online experiments, the "Jewish Community Online" feature of America Online. JFCS helped develop new material for the site and handled responses to the "Ask JFS" e-mail area. In 1996 this agency registered the "jfcs.org" domain name and began offering dial-up and e-mail accounts to our staff.

Today, our clients and the world community are welcome to browse our Web site at <http://www.jfcs.org> to learn about JFCS, read full descriptions of programs and services, to find out office locations and hours of operation, and much more. They can send e-mail to various addresses within the jfcs.org domain representing regional branches and programs, as well as key administrative and program staff. They can expect that their e-mail will be seen and responded to promptly and that we will be able to respond to a wide range of requests for information online.

They may even expect to be able to donate to JFCS online, and this too is becoming possible for both annual "Friends of JFCS" contributions and "Tribute Fund" gifts to honor or remember special people or events. Although there is no expectation that we will receive significant donated income through this channel, we believe it is important to open it, as part of our commitment to making ourselves increasingly accessible to and interactive with our donors as well as to our clients (Quelch & Takeuchi, 1981).

Although it is too soon to know just how much interest the world will have in our little Web site, the relative ease and low cost of development made it too tempting to resist, and it was yet another small but important step

in our agency's technological transformation.

## JEWISH FAMILY SERVICES ONLINE

Our experience with the national "Jewish Community Online" effort has given us a very strong message—that interest in local Web sites for Jewish Family Services is growing. Not to prepare now to provide direct client services online would be a missed opportunity of deadly proportions. In other words, if JFS agencies do not get on the information superhighway soon, we will probably end up as roadkill.

"Jewish Community Online" was launched on America Online on December 18, 1995, led by a San Francisco-based group of *Northwestern California Jewish Bulletin* staff in cooperation with JFCS and other interested groups. With seed money from Steven Spielberg's Righteous Persons Foundation, this unique area within America Online became one of AOL's top 100 publishers within three months.

Users have been very active and involved, posting messages on discussion Boards, engaging in lively group "chat" sessions, and asking for information. Their level of interest has been extraordinary, and two of the most active areas have been what we call "Jewish Family and Personal Matters" and the "Ask JFS" information and referral service.

Through this service, people anywhere can feel a part of the global Jewish world. They can call the Jewish community for help. They can access a nationwide directory of JFS agencies and get direct and quick responses to their questions. After the first year, "Ask JFS" was receiving hundreds of inquiries monthly and helping people find the clinical, social service, and practical resources they needed.

Although no clinical advice is given, callers are referred to local JFS agencies and other resources through personalized answers to poignant and urgent requests for help. Doing therapy, family life education, and support groups online is becoming more of a possibility and will probably be included in the next generation of standard JFS services.

Information on a wide variety of subjects is provided. Some of the most popular topics

include parenting, caring for aging relatives, interfaith marriage, adoptions, living Jewishly in a Christian world, where to find help with personal problems, or how to volunteer. There is a wide geographic distribution of users in urban, suburban, and rural areas. Very significantly, the use of this new type of Jewish family service is doubling quarterly. A whole new world of service opportunity is opening up to us. There is no question that our clients and potential clients live all over America and increasingly expect to be able to get help from the local JFS agency easily and online.

## LESSONS LEARNED

Every generation sees itself at the center of unprecedented change, and ours is no exception. These are turbulent times in the JFS world, with major technological changes and environmental shifts reshaping our activities. We will look back on these decades as a time of enormous cultural transformation in our field. And only now has enough time passed to allow us to take stock of what we have learned so far:

- Leadership sets the tone. As with all institutional change, it flows from the top. Agency executives do not need to know all the technical answers, but they do need to ask the right questions (Heifetz & Laurie, 1997). If the leadership understands the importance of figuring out how to use emerging technology to do a better job, the staff members of the organization will follow, even those who are computer-challenged.
- Staff training to create a truly computer-conversant workforce is an unending process. It requires a serious investment of time and money at every level, from secretaries to supervisors. A personalized training/tutorial program for each staff member should be designed and implemented to help that individual better use technology to do a specific job.
- Hiring decisions must make explicit a requirement for computer conversancy. All hires, including clinical positions, must

understand from the beginning of their affiliation that using technology is a part of the way we work.

- An interdisciplinary "technology team" should be formed to bring various parts of the organization together to plan for collective needs, to solve problems, and to design training. This group should function as an advisory group to the agency management. Line staff often know best what works and what does not. They can make invaluable suggestions for the use of technology that administration could never imagine.
- A "virtual" information technology department can work well or better than a traditional information systems department. Especially in small and mid-sized organizations, there may be several individuals with computer knowledge. Assigning them to a "virtual department" to maximize use of their diverse skills can increase collaboration and magnify available resources throughout the organization.
- An annual budget for the purchase and upgrading of equipment, software, and consultation is an imperative. Computerization has introduced a large new category of expense that simply did not exist previously but that is here to stay.
- The dream of a paper-free environment has not been realized, and productivity is not necessarily increased through computerization (Landauer, 1995). However, computers will enable us to do some things better and many things differently. Yet, a caseworker will still be able to provide only a certain number of sessions per week regardless of how many computers we buy. Or, as Nobel Prize-winning economist Robert Solow has indicated, computers are now everywhere, everywhere but in productivity statistics.
- The process of computerizing creates many tensions and challenges. Remember that tension is often a sign that change is taking place and that change takes place incrementally, with many fits and starts along the way. We are still splicing and pasting



new technologies into old ways of working.<sup>1</sup> Learn from others' experience and then apply it to your own environment.

- Agencies that are not online yet should prepare to get connected soon. The option for networking internally and externally will soon become a requirement, and all will need their own Web sites so the rest of the world can find them.
- Prepare for unimaginable surprises. Our thinking has been linear, but is now becoming more collaborative and interactive in every area of our work. Computers and the Internet open up new ways to create community and to provide social services for clients that would have been unthinkable to previous generations.

#### CONCLUDING OBSERVATIONS AND FUTURE DIRECTIONS

Last year, for the first time in human history, the number of e-mail letters surpassed the number of conventional "snail mail" letters. Now, all of the messages sent on Mother's Day in America can be transmitted in one second through a fiber-optic thread the size of a hair.

At the same time, we sense that something is terribly wrong. A malaise has set in, probably because we also now realize that all the science and all the computers in the world

will not help us solve the very human problems that individuals and families face.

This realization opens up enormous opportunities for family service agencies such as ours to become even stronger and more useful. Toward this end, technology becomes a tool of empowerment, enabling us to magnify our considerable strengths, to work better together, and to care for the children, families, and elderly of our communities in exciting and more effective ways.

To survive and thrive, our agencies are gradually changing how we do business, and we will have to change even faster. Because in this new superhighway world, any institution that does not make dust will have to eat it.

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<sup>1</sup>Our thinking on these issues has been influenced by Donna Hoffman and Thomas Novak, Co-Directors, "Project 2000," Vanderbilt University.

## II. FROM THE TRENCHES

