Immigration Advocates
NETWORK

Case Management and Database Systems

In partnership with **idealware**

Presenters

Joshua Peskay
Idealware Expert Trainer
Vice President, RoundTable
Technology

Sheryl Muñoz-Bergman
International Institute of the
Bay Area, Director of
Programs

Immigration Advocates
NETWORK

Introductions

Immigration Advocates
NETWORK

What We'll Cover Today

- Thinking About Constituents
- What Kind of Systems Might Work?
- What Should You Use?
- Managing Other Kinds of Data
- Data Care and Feeding

Constituent Management Is a Struggle

In a recent survey we conducted with immigration legal services organizations we found that **more than half rated "low effectiveness" at managing case and client data**.

Immigration Advocates
NETWORK

Many Lack the Proper Tools

46%

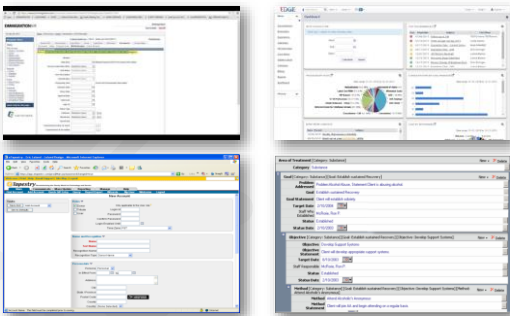Have a case management system.

Immigration Advocates
NETWORK

Or Are Not Using the Tools Effectively

40%

With a case management system do not feel that the software allows them to work effectively.

Immigration Advocates
NETWORK

Databases to the Rescue!

What Is a Database?

A database is a collection of information.

A Rolodex is a database.

But can you run your membership campaign from a Rolodex?

Immigration Advocates
NETWORK

Electronic Databases

Broadly speaking, databases are either flat file or relational.
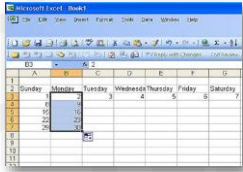
Excel uses a flat file—
easy to use but cannot store
complicated relational data.

LawLogix uses a relational
database, which is able to
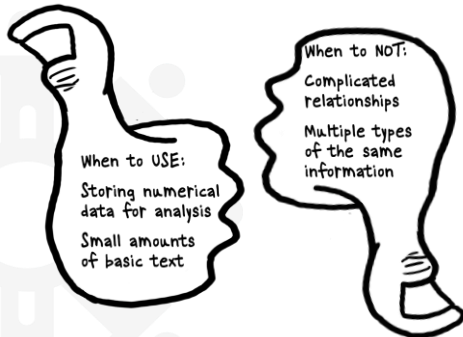handle sophisticated and
complex data.

Immigration Advocates
NETWORK

Excel
is Not a Constituent Database

Having unorganized data won't get you anywhere!

When (and When Not) to Use Excel

When to USE:

Storing numerical
data for analysis

Small amounts
of basic text

When to NOT:

Complicated
relationships

Multiple types
of the same
information

What Are the Core Questions to Consider?

How complicated are the relationships in the data you are collecting?
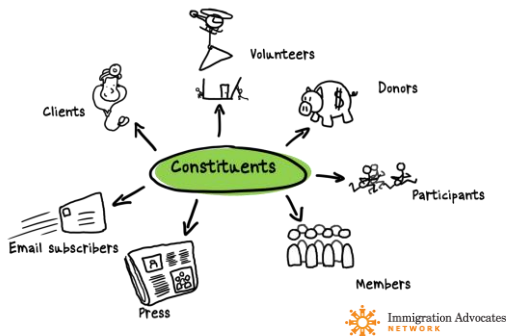
What are you trying to do with the data?

What information do you need to get out of it?

Immigration Advocates
NETWORK

Immigration Advocates
NETWORK

Thinking About Constituents

Start By Understanding Your Constituents

Volunteers

Clients

Donors

Constituents

Participants

Email subscribers

Press

Members

Immigration Advocates
NETWORK

Consider Your Processes

How do you work with these different groups?

Immigration Advocates
NETWORK

How Do You Conduct Outreach?

Emails

Partnership referrals

Face-to-face meetings

Fundraising letters

Volunteer fairs

Immigration Advocates
NETWORK

How Do They Interact with You?

Making a donation

Volunteering

Phone call

Signing a petition

Filling out online forms
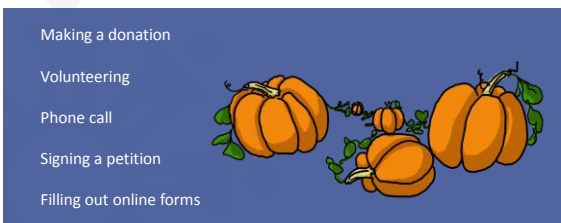
Immigration Advocates
NETWORK

How Do You Serve the Constituent?

Help complete forms and application

Translate documents

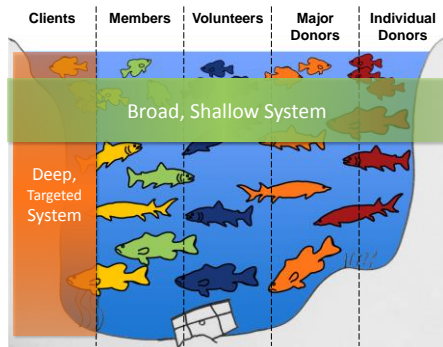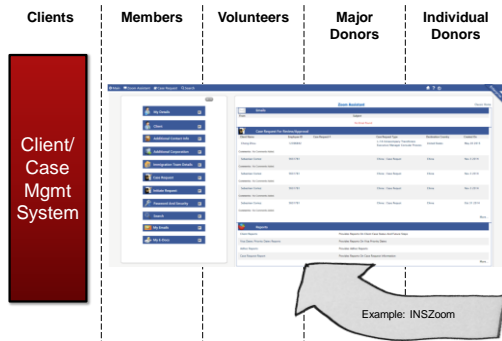Provide consultations

Represent in court

Immigration Advocates
NETWORK

	Outreach	Conversion	Service
Donors	Annual Fundraising Letter	Donation	Thank you letter, Event invitation
Clients	Libraries Partner agencies	Complete intake Complete forms	Representation Documents filed
Volunteers	Legal networks Universities	Represent a client Intake	Fulfill volunteer requirements
Event Attendees			
Press			
Staff			
Etc.			

What Kind of System Do You Need?

Clients	Members	Volunteers	Major Donors	Individual Donors

Broad, Shallow System

Deep, Targeted System

Focus on Client Case Management

Clients	Members	Volunteers	Major Donors	Individual Donors

Client/ Case Mgmt System

Example: INSZoom

Immigration Advocates
NETWORK

Client Case Management Systems: How to Evaluate

Cloud-Based or Installed?

Do you need your staffers to work on the go? Do you have the IT support to manage servers and software updates?

Immigration Advocates
NETWORK

Case Data and Notes

Only 31% say they can easily view current caseload and client demographics.
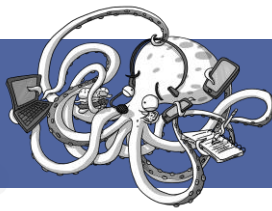
Are you able to record and track the information that's important to you?

Immigration Advocates
NETWORK

Workflow

Is it easy to use? Are there built-in reminders and guides that help you move through the system? Does it use terminology that makes sense for your work?

Immigration Advocates
NETWORK

Forms

Only 25% say that they can easily generate forms.

Are you able to easily create and print immigration forms through your system? How quickly does it update forms?

Immigration Advocates
NETWORK

Intake

How does your system facilitate the intake process? Does it simplify the steps for entering client data? Does it enable online or self-guided intake?

Photo by Albert Herring

Immigration Advocates
NETWORK

Reports

Are you able to get the reports you need? Are reports easy to customize or modify? Are they easy to share?

Immigration Advocates
NETWORK
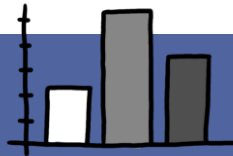
Financial Recordkeeping

Does the system include financial recordkeeping that fits with the kind of work you do?

Immigration Advocates
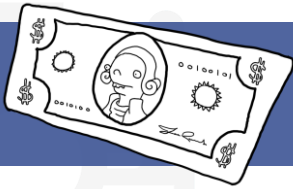NETWORK

Training and Support

How much training and ongoing support does the vendor offer?

Immigration Advocates
NETWORK

Cost

Beware of focusing exclusively on cost. A system that doesn't meet your needs may cost a lot more over the long run.

Immigration Advocates
NETWORK

Feature Checklist

Common Features	
❑ Case tracking	❑ Reporting
❑ Client tracking	❑ Financial features
❑ Form automation	
❑ Document management	

Less Common Features	
❑ Cloud-based system (becoming more common)	❑ Automated reminders
	❑ Customization
❑ Pro bono management	❑ Intake Questionnaires
❑ Client portal	

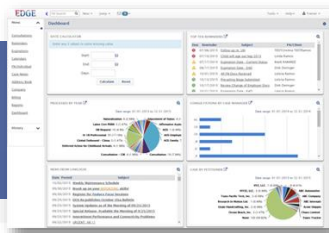Immigration Advocates
NETWORK

Common Immigration Case Management Systems

LawLogix EDGE

- Client portal
- Customizable reports with real-time data
- Outlook integration

ILSForms

- Windows Explorer look and feel.
- Low cost—$499 for two installs and $75 for each additional installation.

ImmForms Plus
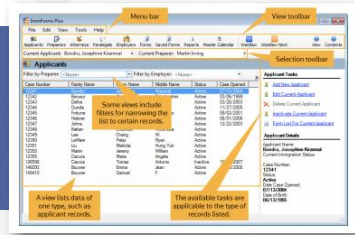
- Primarily for filing forms using a merge function from the database.
- CD ROM download.

Immigration Advocates
NETWORK

eIMMIGRATION AIR

- Customizable client fields, client access
- Between $55 and $85 per month, but offers a nonprofit discount.

Immigration Advocates
NETWORK
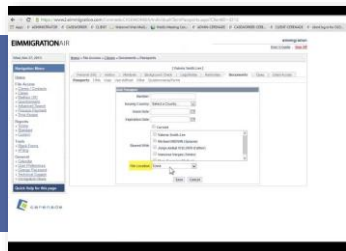
INSZoom

- Case management and compliance automation that also includes workflow management.
- Pricing starts at $360 per year.

Immigration Advocates
NETWORK

ImmigrationTracker

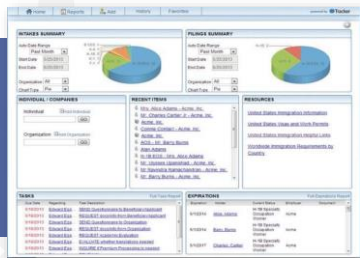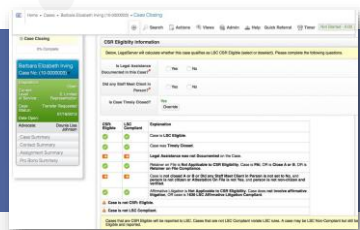- Build in triggers such as automated email, auto-fill forms, or that add to client's portal.
- Personalize dashboards.

Immigration Advocates
NETWORK

LegalServer

- A nonprofit-focused solution
- Offers pro bono volunteer management

Immigration Advocates
NETWORK

BlueDot
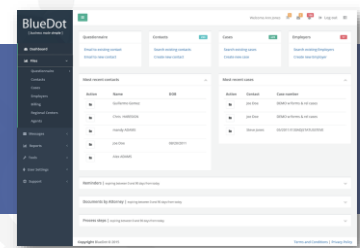
- Cloud and download options available.
- Pricing ranges between $100 & $800 per month.

Immigration Advocates
NETWORK

Immigration Advocates
NETWORK

Data Care and Feeding

Peer Use of Data

35%

Actively use client and case data to inform decisions.

Immigration Advocates
NETWORK

Moving Your Data

Moving data from one system to another is hard.
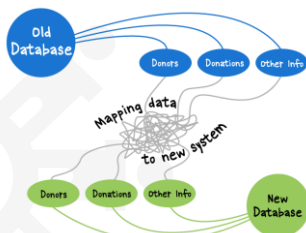
Get someone to help!

Immigration Advocates
NETWORK

Set Clear Data Entry Guidelines

What rules should people follow when using each system?

Immigration Advocates
NETWORK

How Do You Enter Data Uniformly?

Time frame for data entry?

How will it be recorded?

What will and will not be recorded?

Make sure to have clear instructions.

Immigration Advocates
NETWORK

Define Who Should Do What

What should each staff member be doing in the database?
Who's responsible for what?

Executive Director

Volunteers

Other Staff

Development Staff

Immigration Advocates
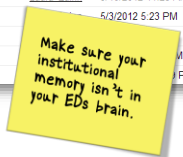NETWORK

Periodically Check and Clean

Are people actually entering what they're supposed to? If not, clean it up.

Immigration Advocates
NETWORK

Track All Your Interactions

Action	Subject	Assigned To	Last Modified Date/Time
Edit	Del	Call: innovation workshop	Laura Quinn	1/11/2013 5:34 PM
Edit	Del	Email: time to chat?	Laura Quinn	1/3/2013 5:38 PM
Edit	Del	Call: six hour innovation workshop	Laura Quinn	10/16/2012 10:16 AM
Edit	Del	Email: Re: Heller Consulting donor management comparison	Laura Quinn	10/12/2012 9:31 AM
Edit	Del	Email: Re: thanks for your thoughts in the discussion group!	Laura Quinn	9/14/2012 4:17 PM
Edit	Del	Email: thanks for your thoughts in the discussion group!	Laura Quinn	9/10/2012 11:25 AM
Edit	Del	Email: Fwd: Survey findings.		5/3/2012 5:23 PM
Edit	Del	Email: Fwd: Survey findings.		
Edit	Del	Email: Re: Survey findings.		
Edit	Del	Email: Fwd: proposal for fundraising training		PM

Make sure your institutional memory isn't in your EDs brain.

Immigration Advocates
NETWORK

Training Is Essential

Before Using the Software
• Business Standards
• Best Practices

Ongoing
• Refresh
• Remind
• Update

Clean and Healthy System

Immigration Advocates
NETWORK

Use Your Data to See What Worked

What percentage of your new cases were closed?

What was the average gift from donors?

Who are your most active volunteers?

Remember: Your data shouldn't just live in your system…USE IT!

Questions?

Immigration Advocates
NETWORK

Your Homework

Meet with your technology team and discuss your data strategy and, if you're considering a new case management system, what goals you think it will help you achieve.

Once you've outlined your goals, list four or five features you need in a new case management system.

Join Us!

Join a community of over 8,000 advocates dedicated to protecting and promoting the rights of immigrants in the United States.

To learn more, visit
www.immigrationadvocates.org

twitter.com/immadvocates

facebook.com/immigrationadvocates

Immigration Advocates
NETWORK