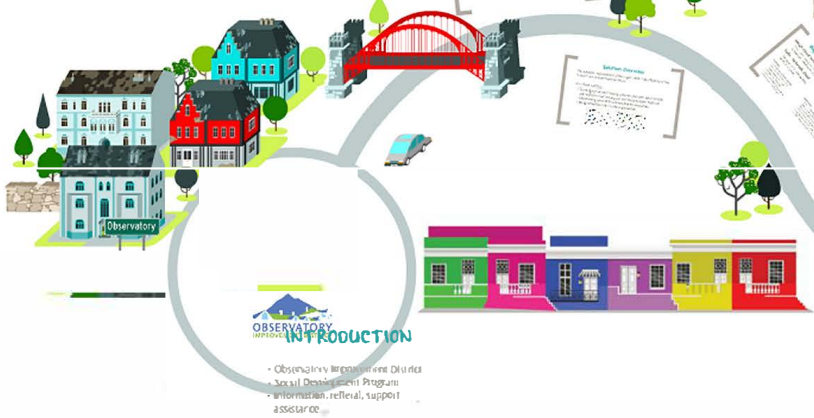




Operation: OBSID

Improvement of Case Management Workflow



UCT KNOWLEDGE CO-OP

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 As part of their INF3011F course,
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The UCT Knowledge Co-op facilitated this collaborative project.
 See <http://www.knowledgeco-op.uct.ac.za> or
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INTRODUCTION

- Observatory Improvement District
- Social Development Program
- Information, refferal, support, assistance



THE PROBLEM

- Need for shared database
- Permissions for confidentiality
- Lack of data insight and visualisation
- Fragmentation of case data across multiple software platforms.
- Lack of notifications and alerts to remind and notify social workers.



Solution Overview

The Solution: Improvement of the organisation and efficiency of the current case management workflow.

Aim of our solution:

- Leveraging free and existing software and tools which OBSID are and have used in the past. i.e Google G-Suite, Trello etc.
- Maintaining compatibility with existing infrastructure.
- Bring immediate value to the organisation.

Requirement	Google Services	Microsoft Services
Forms	✓	✓
Editable Forms	✓	X
Linking with Spreadsheet	✓	✓
Subscription	Free (15gb)	Premium

High-Level Overview of Solution

Google Cloud Servies - 15gb (Free) 100gb costs R29/month and 200gb R39/month

Form - data capture and modification
Spreadsheet - database for information



Trello - 10 Boards (Free)

Setting up and monitoring tasks
Notification system

Business plan costs \$9.99/month (about R145/month)



Features:

- Easy to use and user-friendly
- Requires little to no training
- Data saved on the cloud
- Available on all devices
- Allows data filtering by queries
- Allows access to other users

Limitations:

- Only a maximum of 10 files are allowed to be uploaded per question on the form
- May require some training to use different tools
- Form allows a 1000 responses - duplicate
- Requires data (mbs) to capture information
- Google's Access Controls for sharing

Demo

1. Field Worker
2. Social Worker Administrator
3. Social Worker

Testing

1. Example Testing
 - wikihow for prototype
2. Integration
 - tested by using fake values
3. Compatibility
 - browsers and platforms

https://docs.google.com/forms/d/e/1FAIpQLSdByb7miVgdIYxEDefZmnfhly9oxb1cAC6_OAKSiRI4Pp4AQQ/viewform



CharityTracker™

vs.



nonprofitsuccesspack

Salesforce NPSP	CharityTracker
Focused on donation management, fundraising, grants management, volunteer management and events management.	Focused specifically on NPOs dealing with case management.
Tools and features do not fit the mould of OBSID.	Tools and features are more tailored to OBSID.
10 Enterprise Edition CRM Lightning subscription at no cost if organisation is eligible. Additional is \$36 per user per month.	\$25 per user per month - negotiable
Offers analytics and reporting	Offers analytics and reporting
More support with other software tools.	
More plugins available.	
More customisable.	

Project Management and Reflection

PM tools used:



Official communications
between sponsor and
mentor



slack

Intra-team communication



Task management and
progress tracking



Google Drive

Resource Sharing

Practices:

- Weekly sprints.
- Post-sprint review.
- Deliverable meetings - start and end.
- Reflective sessions after deliverable hand-ins.

