

ALIGNING PEOPLE, PROCESS, AND PLATFORM

*Strategies for Effective Case
Management Systems*



Presenters



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Welcome & Framing

SHARE IN THE CHAT

Your name, organization, role,
location

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Agenda

**Welcome &
Introduction**

01

**Questions &
Discussion**

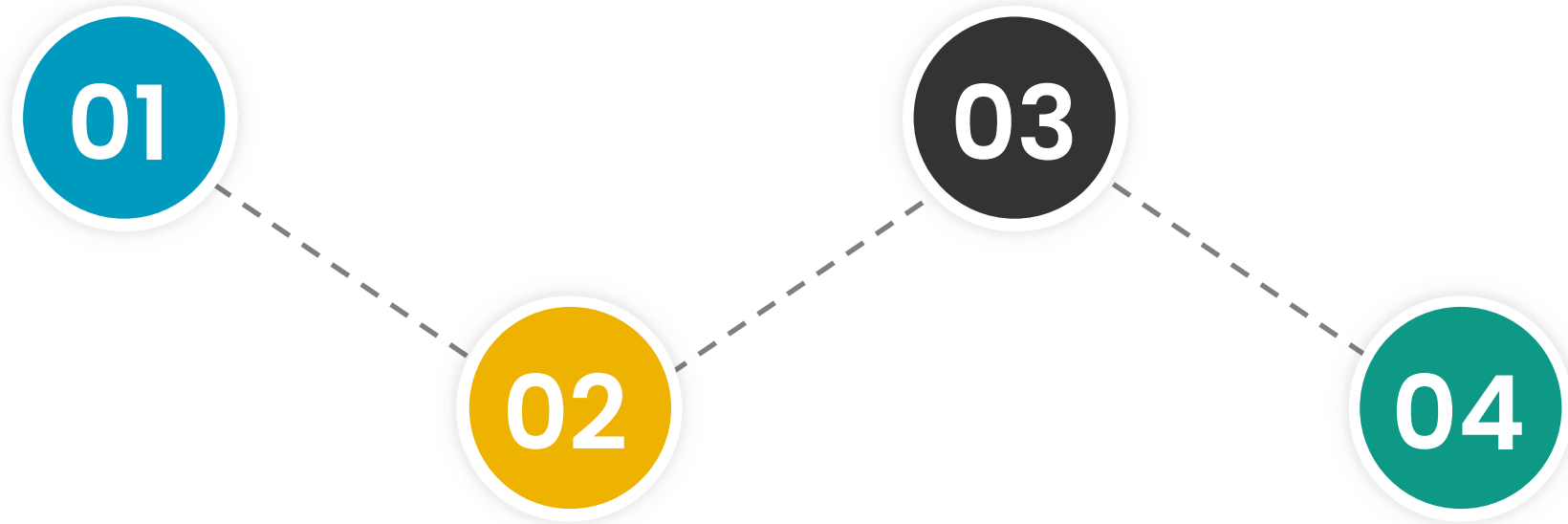
03

02

**Creating Conditions
for Collaboration,
Adoption, & Impact**

04

Closing



THE CASEWORTHY WHOLE-PERSON PLATFORM

One Platform and
One Source of Truth
for Multiple Programs

APPLICATIONS

Purpose-Built for the Real Workflows of Human Services



PLATFORM MODULES

Advanced Capabilities that Support the Platform



THE DATA LAKEHOUSE

Brings Together Your Data from Any Source



Data Security & Sharing

Granular access controls
enable trusted cross-sector
data sharing

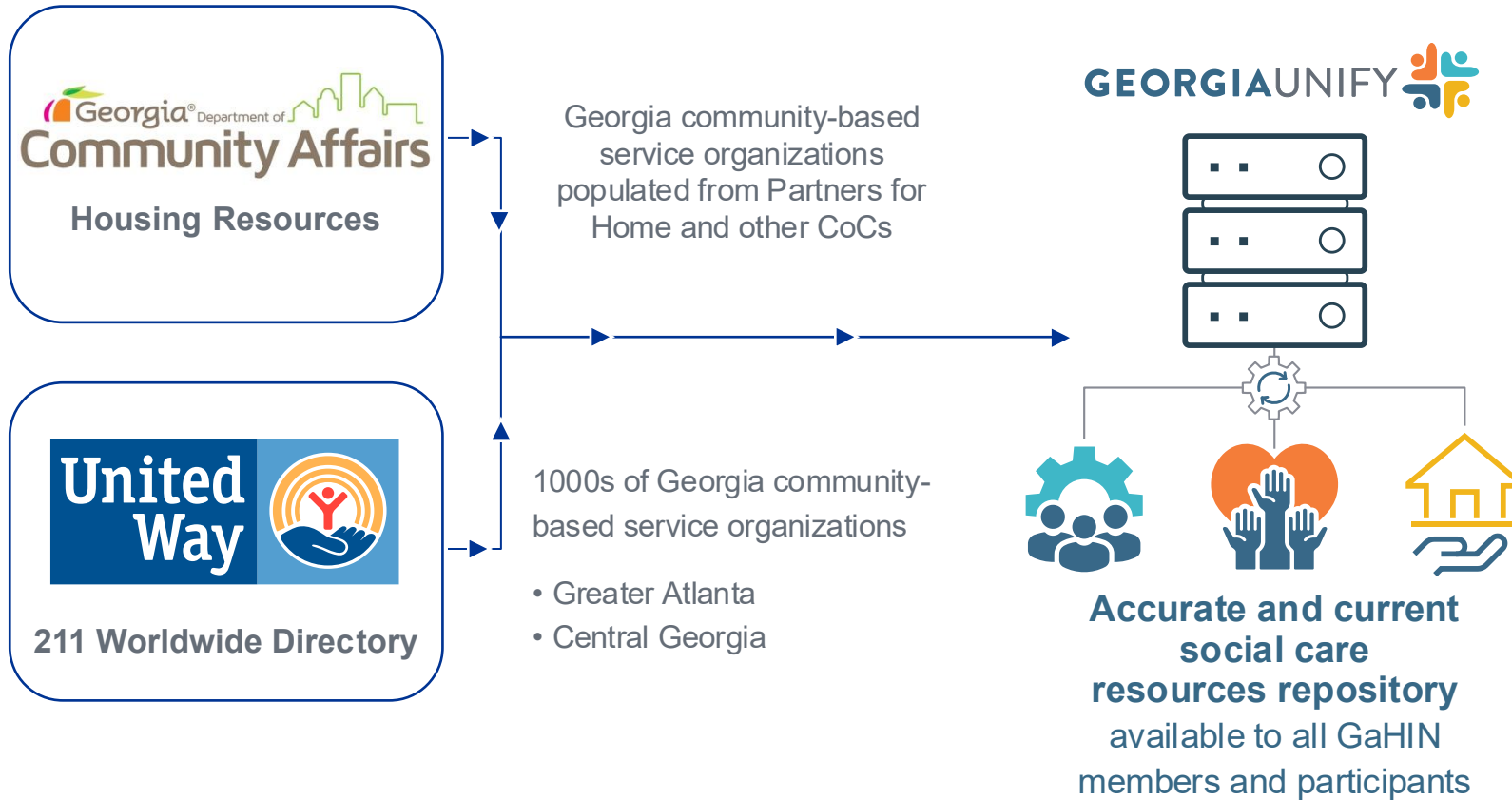
Flexible Workflows

ApBuilder adapts to unique
community processes and
partnerships

Actionable Intelligence

CORE analytics surface
insights to drive
collaborative impact

Building the Community Resource Directory

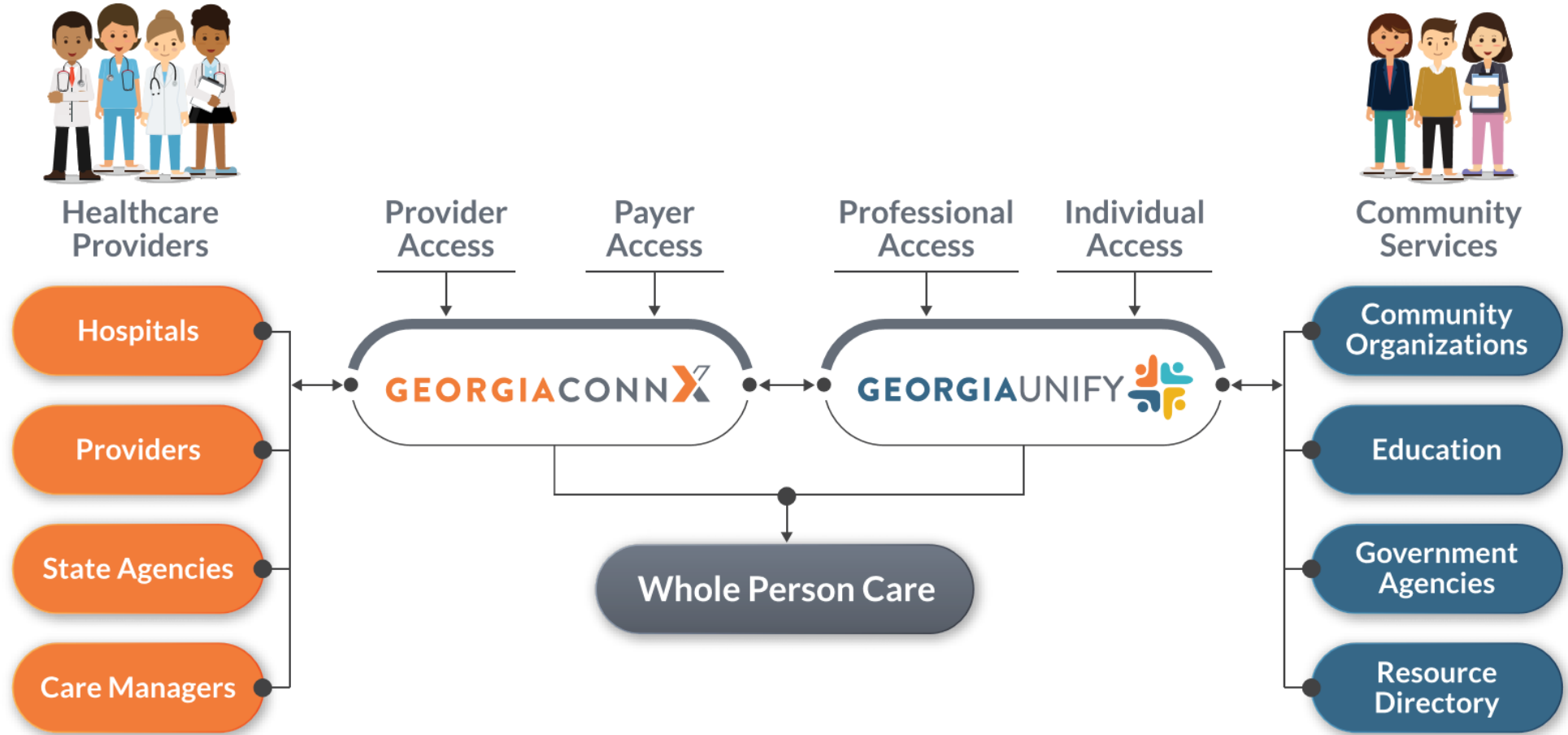


Both organizations populate GaHIN's social care repository with data for community-based service organizations.

Initial United Way push will be Greater Atlanta 211 and Central Georgia 211 Resource Directories

Both organizations are responsible for maintaining data accuracy with the one-way data feed.

Enables Whole Person Care



Learning Objectives



Build cross-boundary partnerships that support effective implementation

Develop collaborative governance and decision-making frameworks



Optimize infrastructure for adoption, maintenance, and long-term value

Cultivate a culture of learning and continuous improvement



Why Foundations Matter



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Checklist Overview

READINESS CHECKLIST

- Used to identify strengths and gaps
- We'll reference it throughout



Case Management System Readiness Checklist

Aligning People, Process, and Platform:
Strategies for Effective Case Management Systems

1. Your Role & Context

- I understand my role in platform selection, implementation, or use
- I know who else is involved in implementation (leadership, staff, partners)
- I am clear on where our organization is in the implementation journey (Exploring, Planning, Implementing, Post-launch, Not sure)
- I know whether we are using CaseWorthy, another platform, or none yet

2. Collaboration & Alignment

- Key internal teams are aligned on why the platform is being implemented
- External partners understand how the platform will affect shared work
- Expectations for collaboration are discussed, not assumed
- Communication across teams and partners is generally effective

3. Governance & Decision-Making

- Decision-making roles for implementation are clearly defined
- There is a clear process for resolving questions or disagreements
- Leadership support for implementation is visible and consistent
- Governance structures support implementation

4. Organizational Readiness

- Current workflows have been discussed or mapped
- Staff have time, training, and support to adapt to new ways of working
- Policies and procedures align with how the platform will be used
- Capacity constraints are acknowledged

Collaboration & Alignment

Building cross-boundary partnerships to support the platform

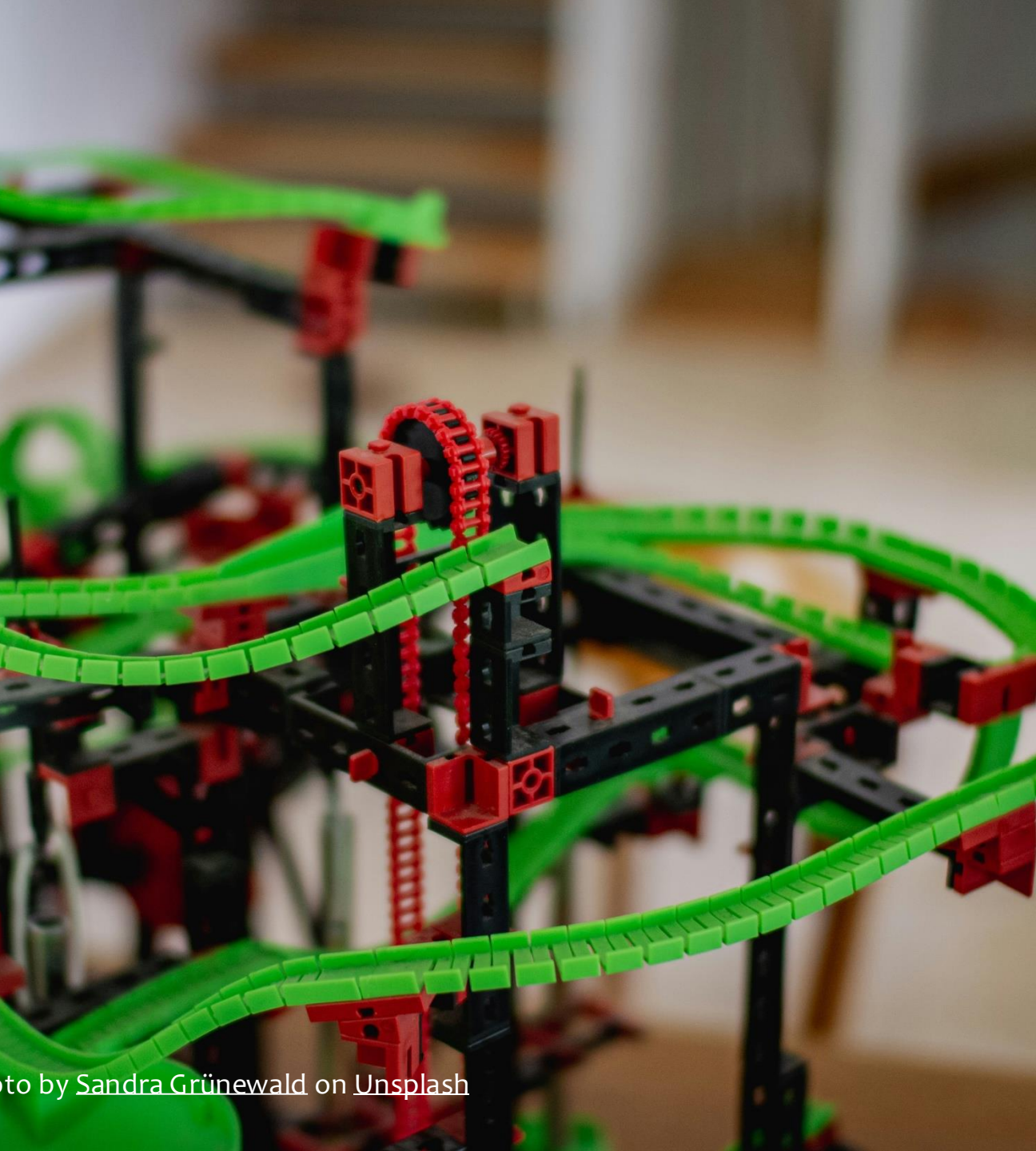


Photo by Sandra Grunewald on Unsplash

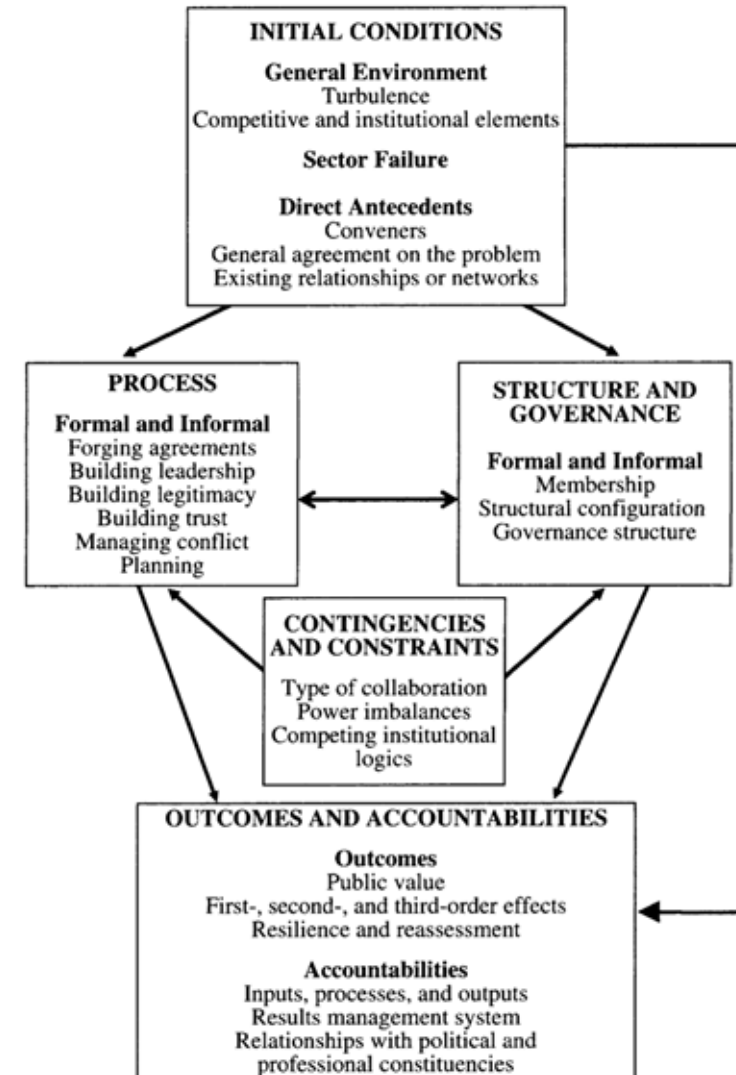
Collaboration & Alignment

CHECKLIST FOCUS:

- Shared purpose and expectations

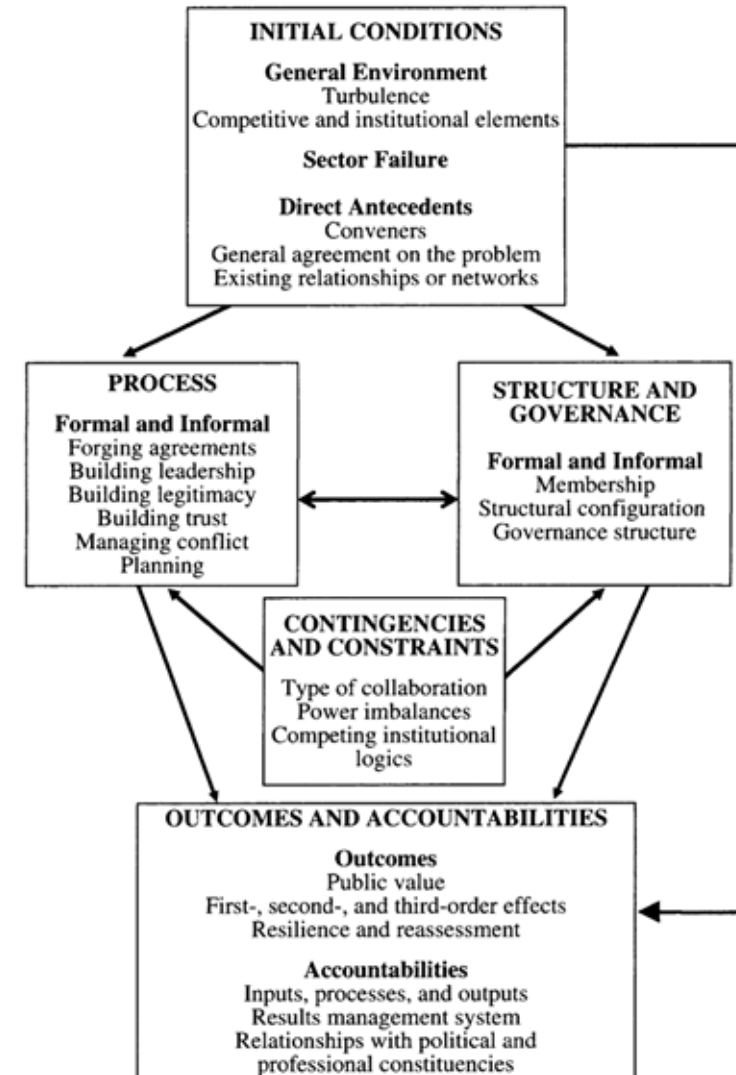
A Framework for Understanding Cross-Sector Collaborations

Cross-Sector Collaboration refers to “the linking or sharing of information, resources, activities, and capabilities by organizations in two or more sectors to achieve jointly an outcome that could not be achieved by organizations in one sector separately.”



A Framework for Understanding Cross-Sector Collaborations

- ✓ Initial Conditions
- ✓ Processes
- ✓ Structures & Governance
- ✓ Constraints & Contingencies
- ✓ Outcomes
- ✓ Accountability



Governance & Decision Making

Creating strong collaborative
governance structures



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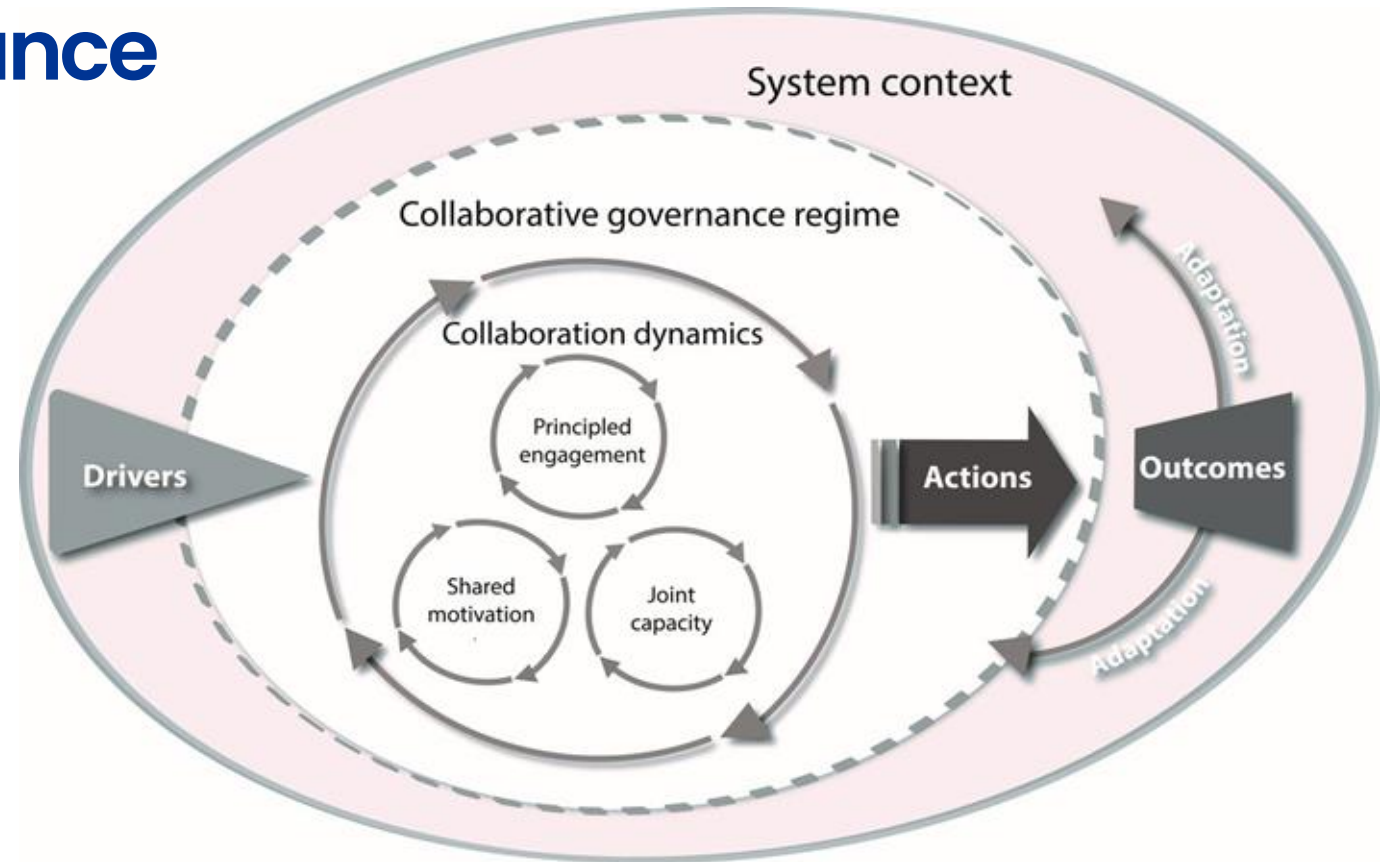
Governance & Decision-Making

CHECKLIST FOCUS:

- Clarity and authority

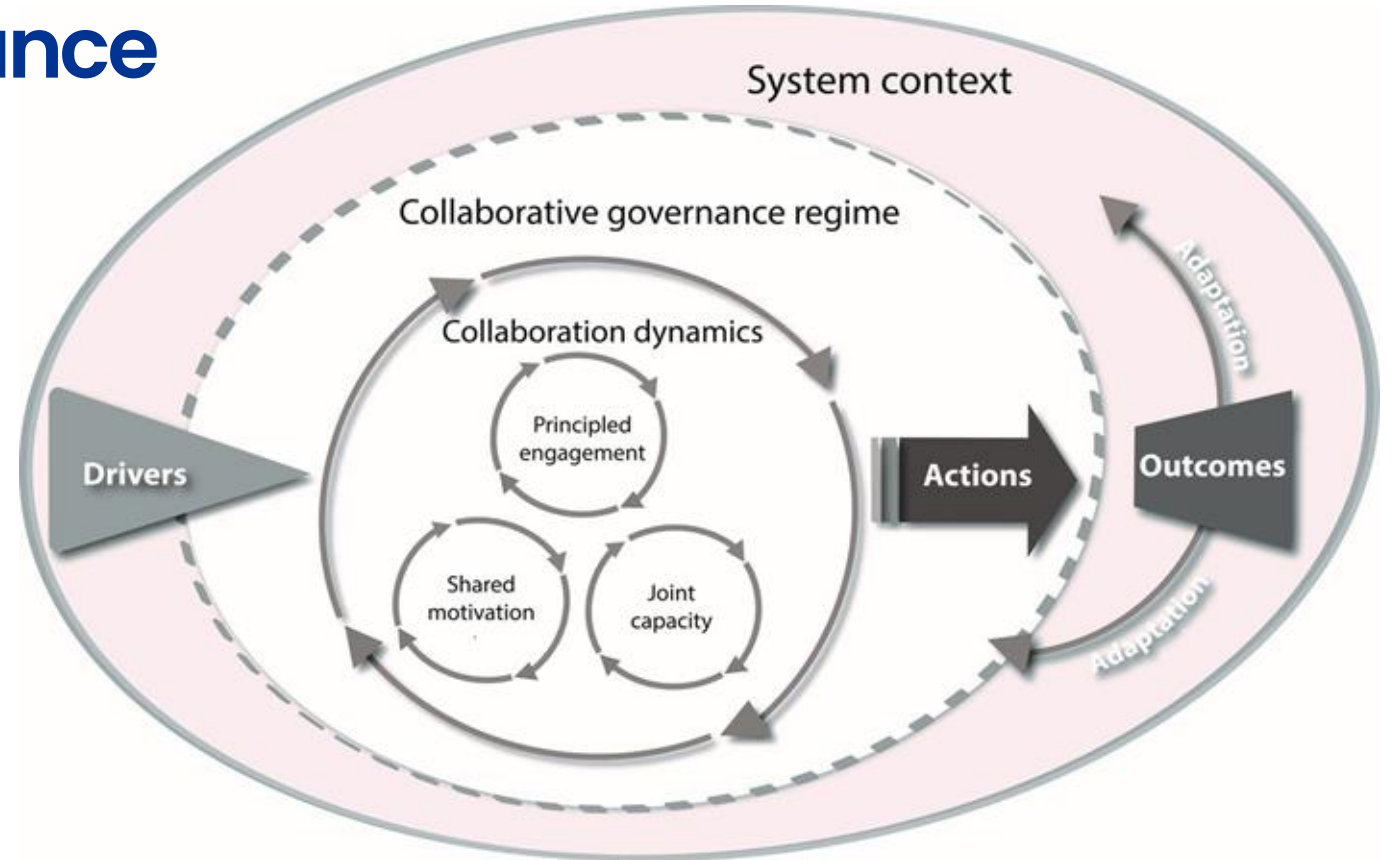
Integrative Framework for Collaborative Governance

Collaborative governance includes “the processes and structures of public policy decision making and management that engage people constructively across the boundaries of public agencies, levels of government, and/or the public, private and civic spheres in order to carry out a public purpose that could not otherwise be accomplished.”



Integrative Framework for Collaborative Governance

- ✓ System Context
- ✓ Drivers
- ✓ Collaborative Governance System (Regime)
- ✓ Collaboration Dynamics
- ✓ Collaborative Actions
- ✓ Collaborative Outcomes
- ✓ Adaptation



Collaborative Governance Decision-Making Framework

For Case Management Platform Implementation



Purpose & Scope



**Governance
Structure Overview**



**Decision-Making
Matrix**



Decision Principles



**Escalation &
Conflict Resolution**



**Communication
Plan**



**Monitoring
Collaboration
Dynamics**



**Continuous
Improvement Loop**

Organizational Readiness

Preparing organizational infrastructure
for implementation

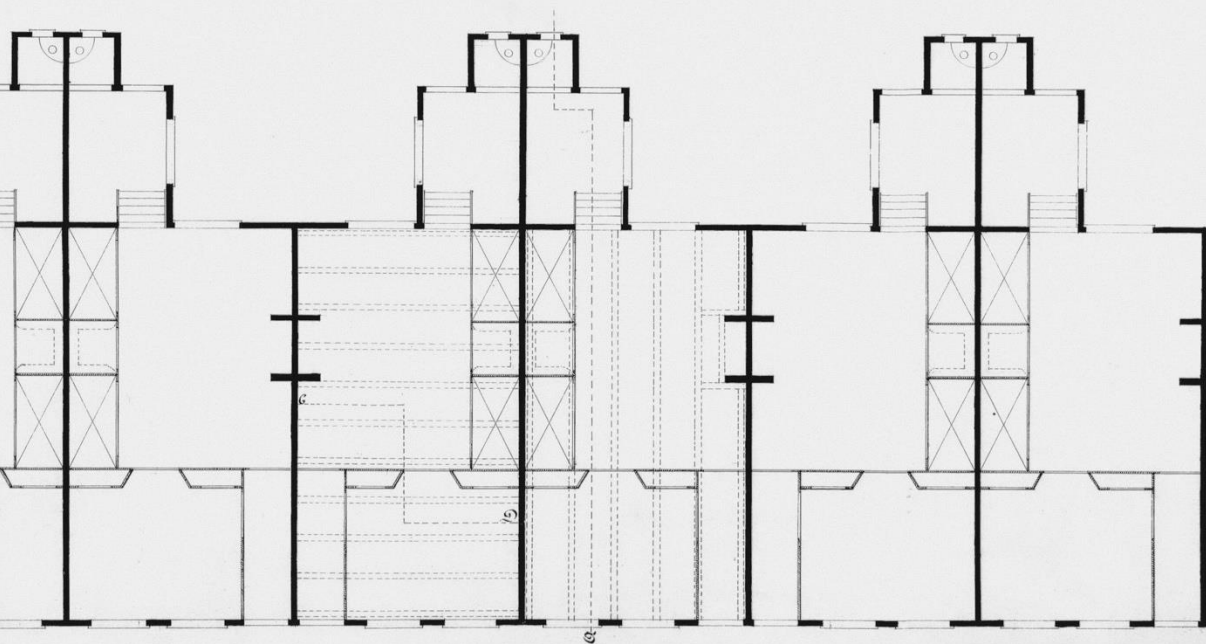
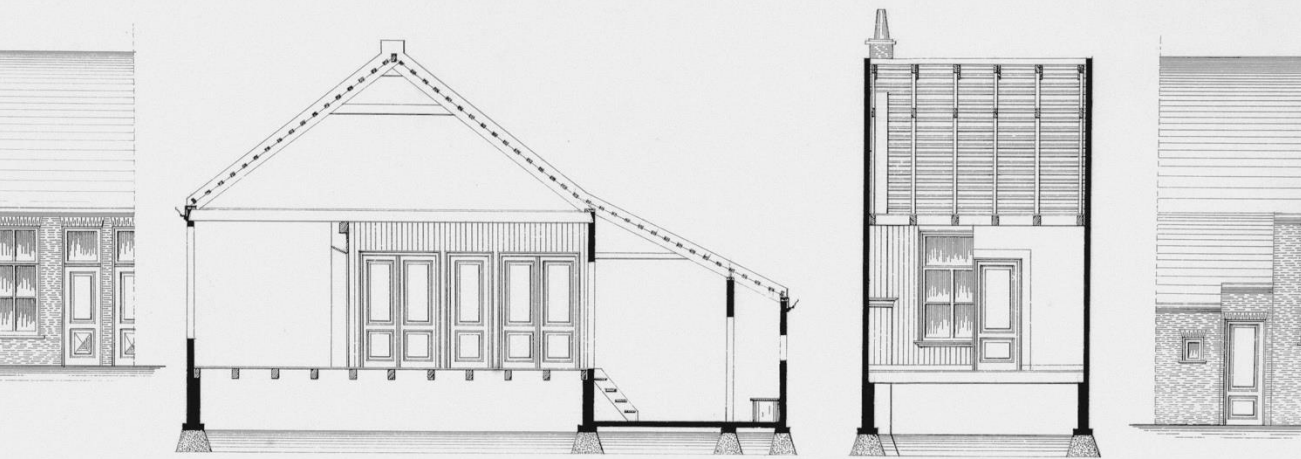


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Organizational Readiness

CHECKLIST FOCUS:

- Workflows, capacity, policies

Organizational Readiness to Change Assessment (ORCA)

Measures organizational readiness to implement evidence-based practices in clinical settings.

q7 (Culture) Staff members in your organization:

- a) have a sense of personal responsibility for improving patient care and outcomes
- b) cooperate to maintain and improve effectiveness of patient care
- c) are willing to innovate and/or experiment to improve clinical procedures
- d) are receptive to change in clinical processes

strongly disagree	disagree	neither agree nor disagree	agree	strongly agree	Don't know/ Not Applicable
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99

q8 (Leadership) Senior leadership/Clinical management in your organization:

- a) provide effective management for continuous improvement of patient care
- b) clearly define areas of responsibility and authority for clinical managers and staff
- c) promote team building to solve clinical care problems
- d) promote communication among clinical services and units

strongly disagree	disagree	neither agree nor disagree	agree	strongly agree	Don't know/ Not Applicable
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99

q9 (Measurement) Senior Leadership/clinical management in your organization:

- a) provide staff with information on VA performance measures and guidelines
- b) establish clear goals for patient care processes and outcomes
- c) provide staff members with feedback/data on effects of clinical decisions
- d) hold staff members accountable for achieving results

strongly disagree	disagree	Neither agree nor disagree	agree	strongly agree	Don't know/ Not Applicable
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99
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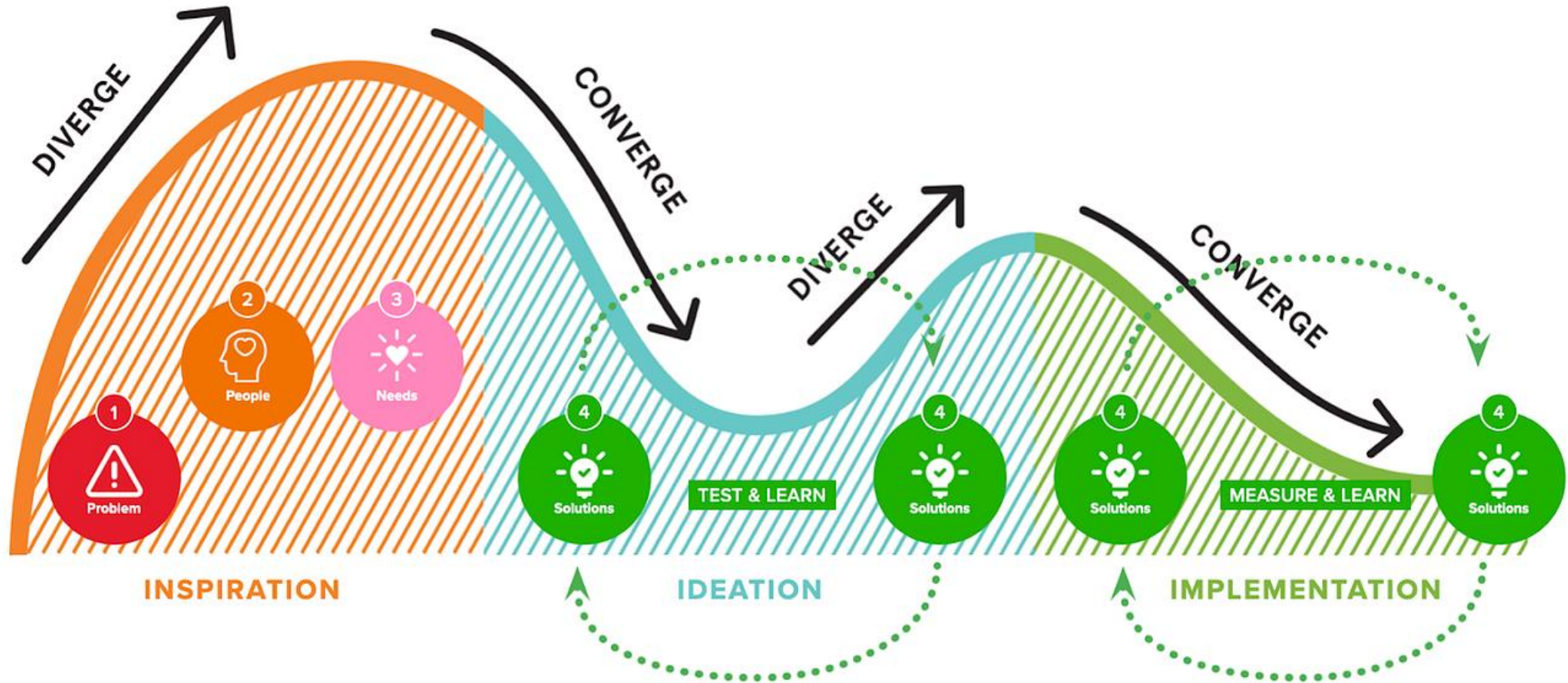
q10 (Readiness for change) Opinion leaders in your organization:

- a) believe that the current practice patterns can be improved
- b) encourage and support changes in practice patterns to improve patient care
- c) are willing to try new clinical protocols
- d) work cooperatively with senior leadership/clinical management to make appropriate changes

strongly disagree	disagree	neither agree nor disagree	agree	strongly agree	Don't know/ Not Applicable
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99
1	2	3	4	5	99

The opinion leaders subscale had good reliability but did not load on any factor at the factor loading threshold of 0.60 we set for this analysis. However, we think that's due to the high bar we set. Uniqueness (the amount of variation in the subscale unexplained by the factors) was low, and the factor loading of 0.49, would meet most conventional thresholds.

Human-Centered Design



Learning & Continuous Improvement

Strengthening a culture of learning and continuous improvement



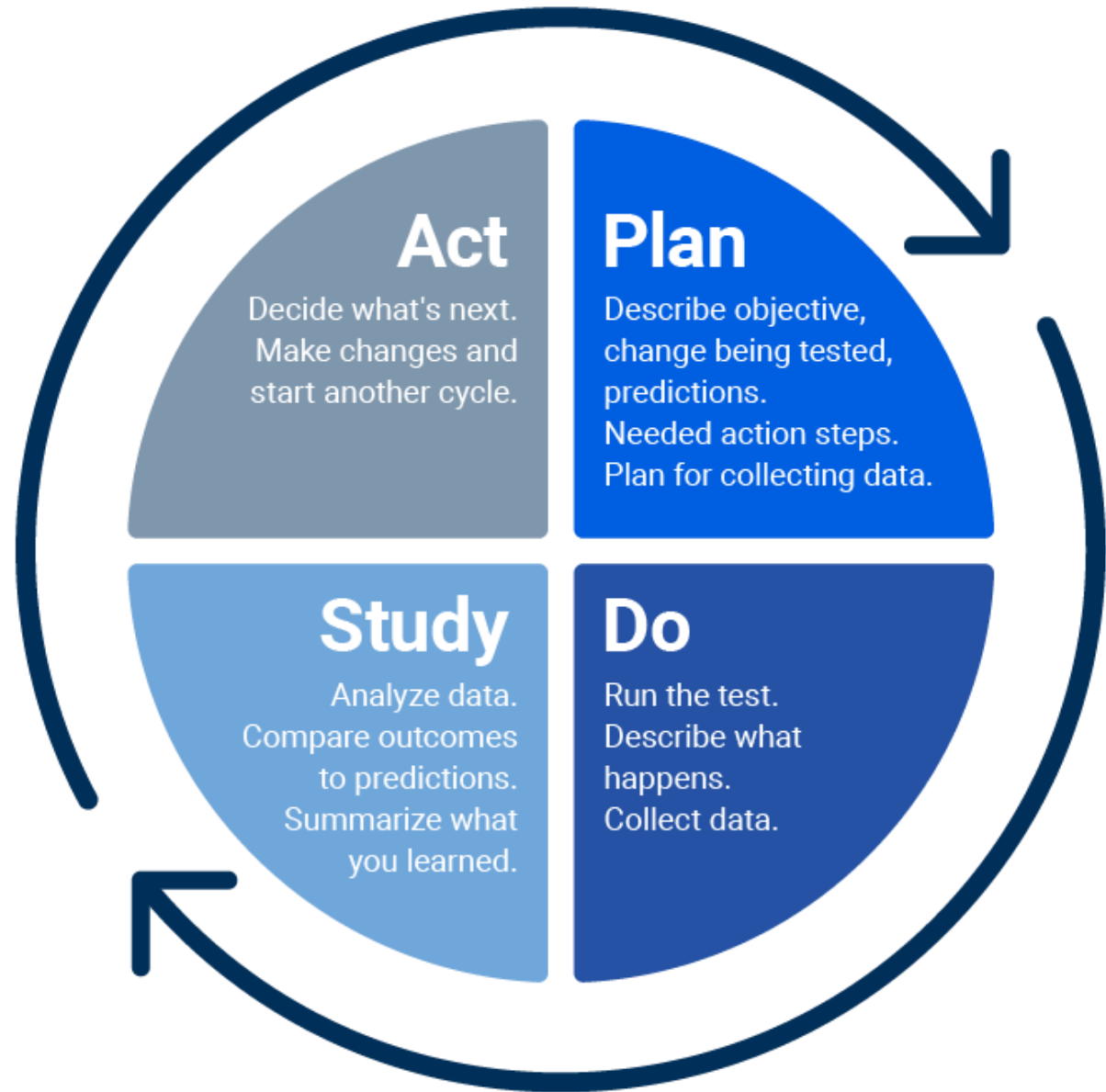
Learning & Continuous Improvement

CHECKLIST FOCUS:

- Feedback and learning

PDSA Cycle

Plan, Do, Study, Act



Results-Based Accountability (RBA)

Performance Measurement Matrix

	QUANTITY	QUALITY
EFFORT	<p>How Much We Do</p> <p>How much service did we deliver?</p> <ul style="list-style-type: none"># Customers served# Services/Activities	<p>How Well We Do It</p> <p>How well did we do it?</p> <p>% Services/activities performed well</p>
EFFECT	<p>Is Anyone Better Off?</p> <p>What quantity/quality of change for the better did we produce?</p> <p>#/% with improvement in:</p> <ul style="list-style-type: none">• Skills• Attitudes• Behavior• Circumstances	

Q&A



Closing

Recap & Next Steps

Learning Objectives



Build cross-boundary partnerships that support effective implementation

Develop collaborative governance and decision-making frameworks



Optimize infrastructure for adoption, maintenance, and long-term value

Cultivate a culture of learning and continuous improvement



Post-Webinar Action Planning

Case Management System Action Planning Worksheet

Focus

Which foundation needs the most attention right now?
(Check one)

- Collaboration & Alignment
- Governance & Decision-Making
- Organizational Readiness
- Learning & Continuous Improvement



Action

What is ONE concrete action you can take in the next 30–60 days?



Partners

Who needs to be involved to move this forward?



Support

What support, tools, or resources would make this action easier?

Commitment to Action

Please share one commitment in the chat

- One foundation you are committing to strengthen
- One concrete action you will take in the next 30–60 days
- (Optional) Who else needs to be involved



Example:

“Governance & Decision-Making — clarify decision authority for document escalation pathways with leadership.”

Moving Forward Together

Share Your Thoughts

Governance + Purpose Built Technology =
resilient, effective, care networks

The road ahead – challenges, opportunities,
and the role of partnerships

Please tell us what you thought and what
you'd like to learn more about!



**Let's Continue the
Conversation**

Share your questions and challenges—
we're here to support your journey.

THANK YOU!

 CaseWorthy™

Appendix

Table 1
A Diagnostic or Logic Model Approach to Collaborative Governance

Dimension and Components	System Context	Drivers	The Collaborative Governance Regime			Outputs Collaborative Actions	Collaborative Outcomes	
			Collaborative Dynamics				Impacts	Adaptation
			Principled Engagement	Shared Motivation	Capacity for Joint Action			
Elements within Component	<ul style="list-style-type: none"> - Resource Conditions - Policy Legal Frameworks - Prior Failure to Address Issues - Political Dynamics/Power Relations - Network Connectedness - Levels of Conflict/Trust - Socio-economic/Cultural Health & Diversity 	<ul style="list-style-type: none"> - Leadership - Consequential Incentives - Interdependence - Uncertainty 	<ul style="list-style-type: none"> - Discovery - Definition - Deliberation - Determination 	<ul style="list-style-type: none"> - Mutual Trust - Mutual Understanding - Internal Legitimacy - Shared Commitment 	<ul style="list-style-type: none"> - Procedural/Institutional Arrangements - Leadership - Knowledge - Resources 	<ul style="list-style-type: none"> Will depend on context and charge, but might include: - Securing Endorsements - Enacting Policy, Law, or Rule - Marshalling Resources - Deploying Staff - Siting/Permitting - Building/Cleaning Up - Enacting New Management Practice - Monitoring Implementation - Enforcing Compliance 	<ul style="list-style-type: none"> Will depend on context and charge, but aim is to alter pre-existing or projected conditions in System Context 	<ul style="list-style-type: none"> - Change in System Context - Change in the CGR - Change in Collaboration Dynamics

Cross-Sector Collaboration

Supporting Literature

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Collaborative Governance

Supporting Literature

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Emerson, K., & Gerlak, A. K. (2014). Adaptation in Collaborative Governance Regimes. *Environmental Management*, 54(4), 768–781. <https://doi.org/10.1007/s00267-014-0334-7>

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Team-Based Action Planning

Use this with your team after the webinar to align next steps

- As a team, which foundation is the highest priority right now?
 - Collaboration & Alignment
 - Governance & Decision-Making
 - Organizational Readiness
 - Learning & Continuous Improvement
- ***What specific problem are we trying to solve?***
- ***What does success look like in 60–90 days?***
- What roles or partners need to be involved?
- ***What decisions or agreements are needed to move forward?***
- What is our first concrete next step? ***Who owns it?***