



OASIS INSIGHT CASE STUDY

by Krista Petty, Community Connector

Collaboration & technology helping San Diego pilot a more dignified & equitable food distribution

They began lining up sometimes as early as at 2:00 a.m. and by the time the doors opened, the line stretched around the block. Food programs were inundated and needed improved processes in order to serve people in the San Diego area. One foundation approached and funded the Jacobs and Cushman San Diego Food Bank and Feeding America San Diego, asking them to work together to find a more equitable and dignified food distribution system.

And they did. Through coordination, participatory conversations, flexibility and implementation of an Oasis Insight pilot program, these two organizations have built the capacity of their food distribution partners with:

- shared case management
- ID cards with scanning & appointment system
- improved agency reporting functions

The following case study describes the solutions and continued possibilities these two organizations are exploring through their collaboration and building an Oasis network.



Oasis Insight (Oasis) is a technology partner providing client management and reporting solutions for organizations and food distribution programs of all shapes and sizes. Oasis was developed in 2011 from the existing program, CharityTracker, to meet the very specific needs of organizations and their partner agencies.

Working together

The Jacobs and Cushman San Diego Food Bank (JCSDFB) and Feeding America San Diego both provide food to hundreds of nonprofit partners throughout San Diego and Imperial counties. These nonprofits include organizations like Salvation Army, Catholic Charities, and many others. One part of the job includes making sure food is handled according to food safety regulations, as well as being recorded and reported. According to Shelly Hahne, Nonprofit Services Manager at JCSDFB, "The other side of our role is to do capacity building, helping those agencies to reach more people or reach them in a deeper way."

In July 2014, both organizations were approached about working together to create a more dignified and equitable food distribution in a very specific geographic region of the city, covering two zip codes.

"We received joint funding to do capacity building with our partners. One of the funder's concerns was seeing really long lines and people waiting two to four hours to get some groceries for their family. People had so many better things to do than wait in line. They could be playing with their kids or searching for a job or something else more productive," shared Hahne.



Needs assessment leads to technology solution

Their first step was to collaboratively do a needs assessment of all their respective partnering agencies. "What we discovered [in the needs assessment] was that the agencies didn't have the technology and tools they needed to serve people. We also knew that we didn't have enough data on the clients they are serving to make a big impact," said Hahne.

So Hahne and Kelcey Ellis, Director of Programs at Feeding America San Diego, started looking at different technology products. Oasis Insight was new to Feeding America San Diego but JCSDFB was familiar with the technology. "Our food bank had been using Oasis Insight for our CalFresh (SNAP) outreach. We learned through a webinar with the Oasis team just how much customization we could do to build what our partners needed. We really fell in love with the full capacity of Oasis," shared Hahne.

"Although this was new technology, the platform is straightforward and able to accommodate the numerous criteria we were looking for in not just collecting data, but using it to deeper understand families who are accessing food through our partner agencies," added Ellis.

Oasis Insight had the capability to provide...

- shared data among the agencies and organizations.
- customizable reports, that both agencies and the organizations could run.
- scanning and ID card creation, leading to a more effective appointment system.
- mobile technology, giving agencies more flexibility during distribution.
- intuitive and user-friendly interface that volunteers could easily learn.

Customizing to meet needs

The two organizations involved a number of people in creating their one-page intake form. Hahne explained, "We gathered a lot of feedback and information from various departments. We actually went to our fund development teams and asked them what they would like to know when they are writing for grants." The team also gathered input from the partner agencies themselves. For example, one site had county funding and they had additional, specific questions they needed answered during intake. Once completed, the intake form was given to Oasis Insight to create the framework for the technology solution.

Why take the time to gather so much information to create a form? Because the data you take into the system and share with the network determines what kind of reporting you can export from it later. Creating custom reports for the network was key for the San Diego organizations. "These custom reports let us track how many places someone is accessing food at, so we can cross reference each site. We want to use that to look at why a family needs to go multiple sites. When I go grocery shopping I might change it up and go to a different store, but I only go once a week. Why can't a family go to one site a week and get their food needs met? We are exploring that via the reporting," shared Hahne.

Ellis said there is a lot to learn from the reporting, more than meets the eye: "Being able to track people served accurately is certainly a great thing, but we wanted to go beyond just the tracking to a deeper understanding of how people are using the food distribution system within a specific geographic region. Is it because they aren't getting their needs met at one pantry? Do they just like the food offered at a site better than another? Are there additional services that are being provided, such as showers or nutrition education that could draw them to you?" The data being collected and collated should eventually give them clues to answering those questions.

A plan for implementation

With hundreds of partners across both organizations, there needed to be a systematic way to implement Oasis Insight. The funder had chosen the specific geographic area they wanted to impact initially, so that narrowed down the scope to 20 food distribution programs in the dedicated two zip codes. "We got those 20 partners all in a room for two different meetings and told them we would be implementing Oasis over the next two years. We could just see on their faces which agencies were really ready for change and up for trying something new. Three agencies were immediately eager to make technology improvements and were

willing to be guinea pigs. We were honest in telling them it's all new and there would be kinks to figure out as we went along," said Hahne.

A fulltime coordinator was hired to help with the roll out process. That coordinator was in charge of recruiting 10-15 volunteers that went out to the partner site with her to administrate a bulk enrollment of clients. They did this on food distribution days, putting hundreds of client information into the system. "We did for the partners so that they were not burdened," said Hahne.

Along with the bulk enrollment the coordinator was also responsible for training partner agency staff, volunteers and, in some cases, recruited a technology savvy volunteer who could stay at the site with the system. Depending on the site, the coordinator would be there during three to six distributions to complete the enrollment.

Ellis shared, "People were initially very scared of the change and implementing a system that was different than what they are used to. But in using Oasis, we've been able to not only train new sites with ease, but provide levels of sophistication and dignity to these on-the-ground organizations they didn't think was possible."

Once those three sites were up and running, the two organizations once again gathered the 20 agencies back together to discuss further roll-out. "Those three agencies got the other agencies so excited that some of the partners didn't even want to wait for one of our staff members to come do a roll out! They were ready and wanted to start using Oasis on their own. We did put the brakes on a little so we could help them learn from our lessons," said Hahne. The additional pilot sites helped dictate the roll-out schedule, taking holidays or special events into account. "Our coordinator set a boundary that she could only be at three sites per week. She made up a calendar of how long it would take to roll out each site, with their beginning and end dates in place," said Hahne. To date, there are 14 partner agencies as a part of this Oasis Network.



Appointments & shorter lines!

Although it is still a pilot project in one specific area with 14 agencies, they have seen very positive results. With the implementation of Oasis Insight, the agencies started an appointment system. Each ID card also has a color associated with it. For example, if your last name starts with A through D you are in the Blue color group.



JCSDFB & Feeding America San Diego designed and displayed posters in three languages highlighting the new ID cards & food distribution process during bulk enrollments at sites.

"There are six different color groups," said Hahne, "If you are blue, you are served from 9 -9:30 am. This broke a group of 300-400 people coming to receive food into smaller, more manageable appointment times instead of everyone coming for food at the same time. This allows the clients not to have to wait because they are all given an equitable food packet. If you come at your allotted time, now you can get in and out in 15 minutes."

Ellis said, "What's great about appointment times is the customization to each agency's unique clientele. While time slots for a group of 300 people may be 30 minutes long, for that agency serving about 150 people, they can be just 15 minutes long. Or adjusted based on space availability, volunteer support, bus routes and timing, etc. And we worked really hard with our agencies to ensure that those getting food in the first appointment slot are getting the same package as those in the last slot so the fear of not being enough food is mitigated."

One partner agency reported back to the organizations: *"They [clients] used to arrive at midnight or 2:00 a.m. Now the earliest is about an hour before we start. It has made a BIG, BIG, BIG difference."*

Identification cards create sense of community

One surprising outcome was the positive response to the creation of identification cards. According to Hahne, there had been different cards for different programs in the past. This is the first one where clients could use it across multiple sites. "When we first started, we really erred on the side of confidentiality, thinking that clients wouldn't want to share a lot of information. So, we didn't put pictures on the ID cards to begin with," said Hahne.

At their third site implementing Oasis, the partner agency wanted to have pictures. "So, we got them a web cam and they started putting pictures on their cards. These same clients were showing up at different sites with pictures on their cards. Everyone else in line would come up and tell us, 'We want a picture, too!' We had to re-issue cards at the others sites because everyone wanted that!" said Hahne.

The organizations and agencies discovered that there was a real sense of pride of membership, like a library card that has their photo and name on it. "These cards make them feel like they belong. One of our partner agencies reported back to me that implementing Oasis broke the ice for them to start conversations with the people they serve." Other agency feedback included the following comments: "It is such a different experience when they have a face and a name and a history" and "Beyond just a food distribution, now we are a community. We've empowered people in line to help us and it has given them a sense of meaning."

Overcoming obstacles

Along with providing the Oasis network and program, the JCSDFB and Feeding America San Diego collaboration provided a \$2,000 equipment package to agencies, which included a laptop, tablet, paper, and laminator. "We basically gave partner agencies everything they needed to get started," said Hahne. While many partners were excited to implement the new technology system, not everyone wanted to jump on board initially. One agency, a health clinic with a food pantry, was concerned about sharing any data with other agencies. Hahne listened carefully to the concerns and even got the CEOs of both organizations to meet. "Our CEO and their CEO met. Their CEO got very excited about it and we agreed that they would try Oasis for three months... Three months later, this particular partner turned out to be one of the biggest success stories. The resistance was gone and they can't wait to use the system at their other sites as well!" said Hahne.

Another point of resistance actually came from one of the "guinea pig agencies." Ellis explained the situation and how they overcame the obstacle: "They loved the idea of using the cards for their pantry (which serves

people over long periods of time, so appointments aren't necessary) but were very hesitant to try the appointment system at their large Saturday distribution. I met with their whole volunteer team one night to hear their concerns and address each question. They came around to trying it for a few months and now love the ease and flow it provides. Our point of contact there told me that their volunteers even get a break between appointment times which allows them to go talk with families as they are waiting and build relationships beyond just handing out food. It's amazing how far personal relationships and a willingness to listen will take you."

Empowering volunteers

These two organizations have found that Oasis has not only helped agencies overcome obstacles, it has greatly empowered their volunteer workforce. "At one of our meal sites, there is a volunteer who has severe arthritis which limits his mobility, but he really wanted to help," said Hahne.

Using Oasis, the agency was able to set him up with a tablet. When the tablet is in barcode scan mode, this volunteer can easily scan people's cards and hit the green button to confirm. Although he couldn't use the mouse on the computer to do it, the second they put a tablet in front of him he was able to assist. He now runs the whole check in process. "He is changed as a person now, being empowered in this role as head of the check in," said Hahne.

Ellis admitted that they've had to train some "not-so-tech-savvy" partners, but said, "Oasis Insight has been extremely easy to use from day one." Hahne shared that her two favorite volunteers are a couple of women in their 80s who used to hand-tally everything on a spread sheet. "They were scared [of the technology] at first but now they are some of our biggest supporters of using Oasis and they just love the system."



Improved reporting builds agency capacity

Even though Hahne, Ellis and their teams can see and run their own network-wide reports from Oasis Insight, they have the agencies run their own reports and send them in. "The reason we did that is because we want them to think about the number of people they are serving. If they were just scanning the clients in every week [and not running reports] I don't think the agencies would have a good grasp of how many people they were serving," said Hahne.

The number of people a site serves dictates shopping and product amounts they are getting. Now that they can produce a report with true and unduplicated numbers, they have seen a big improvement in reporting with some sites even being able to scale back the amount of food purchased.

"We also want the agencies to have exposure to pulling their own reports because it can help them with so much, from grant writing to strategy. Having the data to back up what you are saying is so important," added Hahne.

When the organizations asked for feedback about reporting from partner sites using Oasis, this was one of the responses received: *"One word – PLEASED – it is so easy to run a report and I was one of your biggest skeptics in the beginning!"*

Data research leading to strategic improvements

While improving wait times, creating community and improving reporting would be considered a success in and of itself, Hahne and Ellis believe they are just scratching the surface of what is possible when agencies collaborate and share information. For example, Hahne said they can connect the information from the sites and combine it with their CalFresh Outreach. "We are collecting data like demographic, household size, income and whether or not they receive CalFresh benefits. So from that, we should be able to glean who is eligible but not using CalFresh. From that, we can send them information about applying for CalFresh or send an outreach worker to set up a table during distribution and teach people what is available and help them enroll." They see the possibility of connecting other public benefits to these clients as well.



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Future roll out dreams

Having just received funding, San Diego Oasis Network pilot project will be expanding to 11 more agencies in the two zip code area. Eventually, Hahne and Ellis would like to see all agencies on board, but are willing to tackle this community by community, going to areas where there is very low access to public transportation next.

Their dream is to have researcher or research team who would be savvy with digging into the data. "I think this would to help us see how to direct our efforts best," said Hahne. One area to specifically explore is cultural competency. "A lot of agencies come and get as much food as they can and give it out to their clients with no regard to who they are serving and why," admitted Hahne. With 30 different languages spoken within the two zip codes of the pilot project, there is a lot of cultural diversity. "We have honed in on six languages that are spoken by those primarily using our food systems, so we have put everything into those languages to communicate with them," shared Hahne.

Using Oasis, the food bank or the partner agency can run reports to build an overall demographic profile, so they know how to shop on behalf of their clients. Ellis explained, "Oasis has breakdowns of the type of people served (age, gender, ethnicity, veteran status, etc.), average wait times we calculated and suggestions based on who we are able to see their typical client is. If they are serving 25% homeless individuals, it's great to think about offering meals or items that don't require cooking instead of sending folks away with bags of dry beans and pasta."

Hahne added, "If your population is mostly seniors, you should stay away from grapefruit juice and those foods that interact negatively with medications. We have a nutritionist on board who is going to help us with that portion of it as well. We want to build a custom shopping plan for agencies based on demographics. So for instance, if your population is Hispanic, how much rice should you be purchasing? We'd like to provide those kinds of ethnicity reports."

"We wouldn't be able to offer those kinds of personalization and meeting families where they are without the system. Oasis provided the flexibility and customization to really tailor data collection to the needs of the agencies we work with and provide that planning and insight for these families in the community," concluded Ellis.

"The Whole is Greater"

Both organizations emphasize that this kind of change didn't happen because they came to the community and said, 'start using this technology because we said so.' It came from the group participatory conversations and flexibility to work with each agency on a personal level, placing the needs of the families they serve as a priority.

"One of the biggest things that I've seen in working alongside JCSDFB is how the whole is so much greater than the sum of its parts. Yes, agencies can access food from both Feeding America San Diego and JCSDFB, but in working together in tandem with the community, needs are being met that couldn't be met with just one food bank's source of ideas, food or resources. Families are ultimately benefitting from the coming together of multiple voices and resources in the community to not just get food they need, but receive it in a dignified manner that frees up time for them to spend with their family, at work, going to school, essentially anything other than standing in line to get food," said Ellis.

To learn more about Oasis Insight, visit www.oasisinsight.net. Special thanks to Shelly Hahne and Kelcey Ellis and their teams for their important contributions to this report and their use of Oasis Insight in creating solutions for communities. Photos provided by Jacobs & Cushman JCSDFB & Feeding America San Diego.