

# Oasis Insight CSFP Report



Oasis Insight (Oasis) is a technology partner providing client management and reporting solutions for food banks and food distribution programs of all shapes and sizes. Oasis was developed in 2011 from the existing program, Charity Tracker, to meet the very specific needs of food banks and their partner agencies. Both Oasis Insight and CharityTracker are products of Simon Solutions, Inc. based in Florence, AL.

## Technology Advances CSFP Data Collection, Distribution and Reporting while Improving Senior Experience

by Krista Petty, Community Connector

The Commodity Food Supplemental Program (CSFP) exists to improve the health of low-income elderly persons at least 60 years of age by supplementing their diets with nutritious USDA Foods. The Jacobs & Cushman San Diego Food Bank (JCSDFB) has a robust CSFP program, serving thousands of seniors monthly. Having already used Oasis Insight to successfully collect and report on data for their CalFresh program (known as SNAP in other states), in January 2016 JCSDFB and Oasis pioneered improved technology for CSFP customer intake and food distribution, certification and recertification.

While staff of both organizations knew this could increase the efficiency in distribution and reporting, they were pleasantly surprised at the greatly improved customer and volunteer experience. The following report on the program features an interview with Daniela Solano, Direct Services Manager at JCSDFB about the development, implementation and initial outcomes of using Oasis Insight. Daniela has served at the food bank for over eight years and was instrumental in implementing Oasis for CSFP and CalFresh at JCSDFB.

### Daniela, describe your role at Jacobs & Cushman San Diego Food Bank & CSFP there.

**Daniela:** I am the Direct Services Manager and I work with CSFP, CalFresh and Food for Kids. Our CSFP distributes to 9,766 people across 46 distribution sites a month. Some of our distributions are extremely large. The most we serve in a single day is 1,000 people and we can do that in five hours.

### What does your distribution look like using Oasis Insight technology?

**Daniela:** We have seven work stations with our tablets (Surface Pro computers with detachable keyboards) that are all connected to Wi-Fi allowing us to connect to Oasis Insight. We only have three paid staff members so the other tablets are being used by highly trained volunteers. Having the Oasis Insight program really allows us to not only capture information and in real time, it allows us to go through the distribution at a faster pace and provide better service to our customers.



**Daniela Solano,  
Direct Services  
Manager, Jacobs &  
Cushman San  
Diego Food Bank**

We find that the tablets are easy to transport and staff are able to load all seven in to one suitcase verses carrying multiple bags for the laptops.

The tablets are so useful at the distributions because you don't have to be sitting down. You can walk the line and provide a little more one-on-one service. Sometimes even having the client sign on the signature screen, not the signature pad. We are able to provide a more personal connection with the client that way. After the first three months, I can't express just how satisfied we are with the system. We didn't realize just how much of an impact Oasis would have on our customer service.

### Prior to using Oasis, what was distribution like for the seniors?

**Daniela:** Three years ago, when we had just staff running distribution without volunteers and Oasis, seniors would be standing in line, sometimes for three hours for a box of food. Seniors, who aren't always the healthiest or strong people, were standing in the hot sun. There were multiple times where ambulances had to be called. Since we started using volunteers and now Oasis, our lines have shortened to 30 minutes. The customers have noticed and comment on the much better service they are receiving, and we know that our customer service out on the field has improved significantly. As I mentioned, we were having to call the ambulance. Now, I can't tell you the last time an ambulance was called. Customers are no longer getting to a site three hours early because they know they aren't going to stand in line so long.

The other thing that we noticed is that we can more easily service clients that might show up five minutes late. We aren't going to turn people away. Before, with the lap top computer, we had to open it back up, and get things ready. With a tablet, we don't need to connect to a scanner or anything. Being able to serve them even if they are a little late is helpful. We don't do this often but we can even pull out our smart phones and connect to Oasis securely if we need to, including having them sign on the phone when they get their box of food. Staff like that they can still serve even though everything else is broken down for the day.

### Your agency has helped Oasis Insight develop this CSFP-specific system based on their existing platform. Tell me about your design and customization experience with the developers.

**Daniela:** There was definitely a lot of back and forth communication. As you can imagine having 20,000 cases in our database took a lot of data conversion. Transferring the data wasn't just about the amount of people we were currently serving every month, which is almost 10,000. We worked very closely with Jeffrey and the development team. He has been very helpful and is still very helpful. As we discover new things or run into problems, everything gets quickly resolved.

### Let's talk about some of the specific features of the technology. Was using I.D. cards with bar code scanning and digital signatures new to you?

**Daniela:** Previously, our customers did have I.D. cards, which looked more like a Costco card with their case number on it. We did have laptop computers with digital signature pads attached. The issue we were having is that we had to always sync the information gathered at distribution once we got back into the office. We

transitioned over to Oasis because we wanted something that was live out in the field, with data being collected that same day. The new I.D. cards have a bar code which we can scan and we are more mobile with our tablets. We can even let people place their digital signature right on the tablet.

**What about case history? Do you have that capability?**

**Daniela:** Yes! There is an assistance tab and you can scroll down to a customer's history and all the assistance that client was provided. This is very nice to have on the screen. We are with seniors that tend to forget if they have already received a box that month. It is very nice to have their history and show them where they have been and to see their own signature on the screen. It jogs their memory.

**Does Oasis help you in the CSFP re-certification process?**

**Daniela:** Yes! We asked Oasis to integrate this into our program. We are required to re-certify our customers annually. A few months before their certification due date, the case management screen has a yellow border on a client's file, signaling us to let them know their re-certification is coming up. The month before they must re-certify, the tab is red, so we are able to let them know they need to bring in their paperwork at the next distribution. If they are good, then the tab stays green.

**What kinds of reports do you run with the data you collect?**

**Daniela:** Every month there is a report we need to submit to the state of California. Oasis allows us to track the amount of boxes distributed and match that with the number of signatures collected. If I report that 9,500 boxes were distributed, then I should have 9,500 signatures. That's where Oasis comes in really handy. As I said before, we have 46 distribution sites every month and each site has a specific name. When we go out into the field, we sign into that specific site and record the distribution for that site. The order that the driver takes is also registered under that site, so he knows what he needs.

We also have an ethnicity report we do every year in April. The state wants a breakdown of that information. Before using Oasis, the data that we exported literally came out of the system in an excel file. So we had to add up the fields and that took some time. With Oasis, the report comes in and literally gives me the numbers. It has been a time-saver.

We also asked the team at Oasis to run a special report for us of people who had not picked up a box for a while at distributions. They were able to export an excel file of those names and address and we were able to do a quick mail merge and send a notice to them, just letting them know how to recertify or to call us. It was just a quick check in.

**How are you funding your Oasis Insight CSFP technology?**

**Daniela:** We used our CSFP administrative funds to help pay for the equipment and software. Going forward the monthly expenses will continue to be billed against our CSFP administrative funds. If expenses exceed our allowable CSFP reimbursement, the Food Bank is committed to using general operating funds to continue with this efficient software.

**What was it like training and transitioning to a new system?**

**Daniela:** My direct supervisor and I had multiple conversations with Oasis and seeing it during presentations helped us learn it faster. With our staff, we gave them cases to practice on. With our volunteer training, we showed them the system, but I think volunteers most effectively learn the program with hands-on experience in the field.

The transition was interesting. When we first transitioned over to this new program, the seniors wondered "What is this? Why am I getting a new card with a bar code?" Initially they were somewhat resistant to the change but now that they see how effective the new system is, they actually enjoy going to the distributions.

**What lessons did you learn during the implementation process? Anything you would do differently?**

**Daniela:** That first month was rough, especially since we had to transition almost 10,000 active seniors into the new system! In January 2016, we printed out all the cards in advance, which Oasis Insight helped provide the files for. We printed the cards and laminated them, to have them ready. Distributing new cards to everyone at all 46 distribution sites was definitely a challenge at first. I admit we were probably doing too much too soon, on top of the weather that month when we had the hurricane situation. We didn't have them all ready but for the most part they all got their cards.

Another issue we had was that we were not happy with the efficiency of the system at first. Clients were upset, volunteers were frustrated, saying things like "Oh my gosh, this isn't working!" Within three weeks we identified that it was the hotspot we were using. Once we moved over to another Wi-Fi provider it was wonderful. The volunteers now tell me, "Oh my gosh I can't believe we used to feel that way!" They are very, very happy with Oasis Insight.

We are finally to the point where we can take pictures of the clients. The first couple of months we didn't have time. Now that we have transitioned, we can do this. Customers even like this! If they forget their I.D., now there is another form of identification on our system for them.

**Any suggestions for other food banks looking to improve their CSFP programs?**

**Daniela:** My first suggestion is to go out into the field and experiment and test your connections with a new system before-hand! Had we done that, we would not have run into all the issues we had. Perseverance and problem-solving pays off. It came down to patience and we told volunteers and customers that we are learning while you are learning, too.

For this program, having volunteers has been a tremendous help. We have volunteers that assist at the food bank at the main warehouse and often they will ask about other opportunities and so they might get referred over to us. Volunteers might not always want to pack onions, but see where those onions are going. We also post specific job descriptions for volunteers on volunteermatch.org and so we have gotten a lot of our volunteers from there as well. We have around 12 volunteers in CSFP. These are trained volunteers that aren't just showing up once. They sign up to assist at multiple sites in a month.

**Is there anything you are looking for in the future in developing the CSFP program?**

**Daniela:** We are looking at having more volunteers! We would like to walk around and be even more portable during distribution.

Thank you to Daniela Solano for participating in this interview. Photos provided by Jacobs & Cushman San Diego Food Bank.

To learn more about Oasis Insight, visit [www.oasisinsight.net](http://www.oasisinsight.net).