



# Case Management Solutions

## Agular Vincentian CMS

Working with our Vincentian partners for 4 years, Agular Systems continues to work carefully to identify the needs and daily operational challenges to improve and extend our custom electronic records management suite. This year alone we've added comprehensive pledge support, centralized intake, and a powerful conference to conference referral system.

### Challenge

At SVdP Georgia large scale record keeping was a constant struggle. Understanding the immediate needs of clients and mapping them to standard assistance categories for data collection purposes was burdensome. Over the course of several years SVdP Georgia broke new ground by developed an in-house electronic record tracking system. However, the system need to be enhanced around better communication, information sharing and new features and services. A standardized Diocese-wide approach of managed interaction and financial assistance tracking was needed.

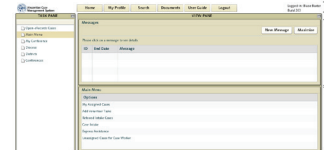
### Solution

Georgia vetted potential partners and chose Agular to build their cloud based and scalable platform - one that could fit the needs of individually diverse conferences and the compliance requirements of districts and councils. Using Agular's Expert Server and partnering with Amazon's AWS Cloud Architecture, Agular was able to build a custom cloud based treasury and casework system - able to track those served by Vincentian efforts from first touch all the way though the process of assistance. Offering a series of optional work-flow models, the system aids member volunteers giving real-time access to client data. It helps in the tracking and streamlining of assistance requests, manages client relationships over time, and has a full suite of treasury and reporting functionality that aids with the generation of the national conference level reporting. It also encourages standardized operational policies - easing the process of volunteer transition and quality of collected data.

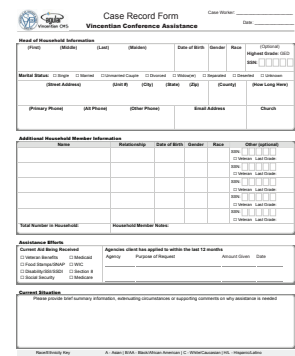
### Results

These efforts benefited Caseworkers and Treasurers - but importantly improved the quality of care being meted out to those seeking assistance. Council and conference leadership are provided with a greater ability to track everything from types of assistance provided over time to ethnographic data and other metrics. Now deploying the product in a dozen states, with more to come - the Agular CMS for St Vincent de Paul is proving an invaluable tool in helping conferences in their efforts to combat systemic poverty.

Example of the Agular CMS for St Vincent de Paul interface.



Home visit form used by caseworkers to collect standardized visit data across all conferences.



Example of the automatically generated Multi-Month Report.

| CMS SVdP  |                    | MONTHLY CONFERENCE REPORT | 2017 |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
|---|--------------------|---------------------------|------|---|--------------------|--------------------|--------------------------|---------|--|------------------------------------|----------|--|---------------------------|---------|--|--|-------------------|-------------------|-----------------------------|---------|--|---|--------|--|---------------------------------|--------|--|----------------------------------|--------|--|-------------------|--------|--|-----------------------------------|-----------------|-----------------|
| Parish Name: <b>ST VINCENT DE PAUL (SVdP)</b><br>Conference Name: <b>ST VINCENT DE PAUL (SVdP)</b><br>Address: <b>123 Main St, Anytown, GA 30001</b><br>Reporting Period From: <b>01/01/2017</b> To: <b>01/31/2017</b><br>Reporting Period To: <b>01/31/2017</b>  |                    |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| <b>Treasurer's Report</b>   |                    |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| Last Month's Ending Balance (Beginning and Ending from Conference Store and Special Notes)<br>Beginning Balance (Reported) <b>\$14,924.00</b><br>Ending Balance (Reported) <b>\$14,924.00</b>   |                    |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| <b>Receipts</b>   |                    |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| <table border="1"> <tr><td>1. Donation from Conference</td><td>\$100.00</td><td></td></tr> <tr><td>2. Donation from Council</td><td>\$50.00</td><td></td></tr> <tr><td>3. Cash Donations - Special Events</td><td>\$25.00</td><td></td></tr> <tr><td>4. Cash Donations - Other</td><td>\$15.00</td><td></td></tr> <tr><td>5. Cash Donations - Special Events/Other</td><td>\$5.00</td><td></td></tr> <tr><td>6. Other Cash Contributions</td><td>\$10.00</td><td></td></tr> <tr><td>7. Other - Unaffiliated Conference/Parish/Other</td><td>\$5.00</td><td></td></tr> <tr><td>8. Other - Unaffiliated Council</td><td>\$5.00</td><td></td></tr> <tr><td>9. Other - Other Assistance Fund</td><td>\$5.00</td><td></td></tr> <tr><td>10. Other - Other</td><td>\$5.00</td><td></td></tr> <tr><td><b>Total Receipts (1 thru 10)</b></td><td><b>\$260.00</b></td><td><b>\$260.00</b></td></tr> </table> |                    |                           |      | 1. Donation from Conference   | \$100.00           |                    | 2. Donation from Council | \$50.00 |  | 3. Cash Donations - Special Events | \$25.00  |  | 4. Cash Donations - Other | \$15.00 |  | 5. Cash Donations - Special Events/Other | \$5.00            |                   | 6. Other Cash Contributions | \$10.00 |  | 7. Other - Unaffiliated Conference/Parish/Other | \$5.00 |  | 8. Other - Unaffiliated Council | \$5.00 |  | 9. Other - Other Assistance Fund | \$5.00 |  | 10. Other - Other | \$5.00 |  | <b>Total Receipts (1 thru 10)</b> | <b>\$260.00</b> | <b>\$260.00</b> |
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| 2. Donation from Council  | \$50.00            |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| 3. Cash Donations - Special Events  | \$25.00            |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| 4. Cash Donations - Other   | \$15.00            |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| 5. Cash Donations - Special Events/Other  | \$5.00             |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
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| 8. Other - Unaffiliated Council   | \$5.00             |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
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| <b>Expenses</b>   |                    |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
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| A. Travel Expense   | \$1,200.00         |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| B. Other Conference   | \$50.00            |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| C. Other Expense  | \$100.00           |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| D. Other  | \$50.00            |                           |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
| <b>Total Expenses (A thru D)</b>  | <b>\$1,500.00</b>  | <b>\$1,500.00</b>         |      |   |                    |                    |                          |         |  |                                    |          |  |                           |         |  |  |                   |                   |                             |         |  |   |        |  |                                 |        |  |                                  |        |  |                   |        |  |                                   |                 |                 |
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# Vincentian Case Management System (CMS)



## Why choose the Aguilar CMS for SVdP?

**Vincentians across the country are installing Aguilar CMS as the best software solution to assist with the daily operational challenges faced by their conferences.**

Systemic poverty is a pernicious problem that is not easily solved with simple assistance. Counting the number of assistance events in a conference is good for metrics and reporting - but better outcomes and brighter futures are truly achieved with a deeper understanding of the problems faced by those seeking help. The Aguilar CMS helps Vincentians realize that goal with a focus on continuity of care and helping map their personalized needs through the actions of members to actual results.

Vincentian home visitors and caseworkers bear most of the information gathering burden in any electronic records system. Standard practices and improved information sharing allow caseworkers to dramatically improve the fulfillment of their core mission. Just as when you switch doctors and your medical records travel with you to help maintain consistent and quality care, the use of client records to show what's been done with neighbors makes a big difference in transforming the lives of the less fortunate.

Vincentian treasurers are the unsung heroes of the conferences. They're also some of the toughest positions to fill. They spend many stressful hours tabulating financials, tax and municipal filings, and reporting on conference activities. The workload can even keep them from taking holidays with family. Aguilar CMS is built to help ease the treasurer burden - making it possible to easily standardize financial processes and improve visibility to other local, district, and council officers. That standardization and traceability makes financial task sharing possible. Then even if these conference stalwarts succumb to volunteer fatigue and reach a point where they feel they've done enough, transitions are easily managed without having the financial records decline into a neglected state.



**AVAILABILITY**  
True-Cloud Application  
hosted on state of the art  
service provider



**INTEGRATION**  
Connect and share  
information across  
the district



**CONNECTIONS**  
Improved Continuity of Care by  
establishing long term  
individual assessments



**ACCURACY**  
Improved quality of  
assistance request data  
and eligibility assessments



**RETENTION**  
Reduces volunteer stress  
and eases transition  
when personnel do change

For Inquiries Contact:  
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(847) 275-9366



# Vincentian Case Management System (CMS)

## Break the Cycle

**Vincentians struggle to make a difference in their communities every day. Finances are tough, many of those who traditionally fill the coffers are struggling themselves, and every dollar counts.**

This is why you need an edge - something that will help you fight the problems your conferences face. With a fully deployed CMS environment - not only will your leadership gain the ability to satisfy grant partners with stories that your efforts bear real fruit, but the people you serve will have an easier time getting the help they desperately need.

Centralized Intake and Outreach center support means being able to leverage the efforts of the Diocese on behalf of the conferences.

Pledge tracking allows you to easily track your efforts when you work with your neighbors and encourage them to find matching funds in direct aid scenarios.

Program support can potentially tie in local food pantry operations, referrals to state and local poverty efforts, and even help satisfy EFSP LROs by helping start and track efforts to secure federal dollars for your neighbors.

With Agular's commitment to online training and the fact that we've been doing this for 4 years, we know the SVdP story as well as any. We know what problems you face and the struggles you have, and we know how many others have worked their way through similar problems. We'll be there to help - just as we have been with so many of the conferences that have gone before you.

In this era where your grant partners are no longer satisfied with simply knowing St Vincent de Paul have spent money to help the poor - but instead want to see details demonstrating your efforts truly help combat systemic poverty it's critical to have and use a powerful electronic records system like this.

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### Testimonials

"We chose Agular because of the three Cs: Commitment, Cooperation and Competence. Agular has years of experience working with Councils large and small. They are organized to work with us on process, community impact and software. They meet our unique needs upfront and have the skills to implement additional solutions that will fit our evolving environment."

Tom Roberts  
Director of Member Services & Programs  
Cincinnati

"Agular is a true partner. When we told them what we needed for our central dispatch they worked with us to get it right and it's been a huge benefit to the poor in our area"

Ralph Bradburn  
Executive Director  
Kentucky

"CMS allows us to identify previously assisted clients so that we know their unique story. Without CMS, we would be "flying blind" and under serving our neighbors... Agular's development team are a blessing. They've done a phenomenal job responding to user requirements and on behalf of all the GA CMS users.. Thank you. We really appreciate everything you've done for us."

John Pepe  
Chairman, Council Technology Committee  
Atlanta

"We used CMS to leverage our recommended banking practices. Financial reporting is now consolidated, quick, easy-to-use and visible. Account reconciliation, error correction and reviews take a fraction of the time they did in the past.

Kasi Cotton  
Council Controller  
Houston