



## OASIS INSIGHT CASE STUDY

# More than Warehouses

## Food Banks Build the Technology Capacity of Partnering Agencies

Food banks have a big job to do. According to Feeding America, 1 in 7 people struggle with hunger in the United States. As the largest domestic hunger-relief charity in the U.S., the Feeding America network of food banks provides food assistance to an estimated 46.5 million Americans each year including 12 million children and 7 million seniors.<sup>1</sup>

How do the regional food banks reach all 46.5 million Americans needing hunger relief? They partner with organizations whose boots are already on the ground serving the local community. This network of partner agencies includes a vast array of caring citizens working or volunteering within schools, churches, agencies, shelters, food pantries and soup kitchens in all 50 states.

Beyond securing donations, implementing programs and managing food distribution, food banks are critical partners in building the capacity of thousands of partnering agencies and organizations. One way food banks are building the capacity of their partners is by connecting them to technology that improves processes, record-keeping, reporting and collaboration. **This case study examines how Oasis Insight is used by to bring about such improvements.**

About the Photo: More than 20 Marines from U.S. Marine Forces Command and the II Marine Expeditionary Force help package bread at the Greater Boston Food Bank in Boston, Massachusetts, March 17, 2015. By Lance Cpl. Calvin Shamoon (<https://www.dvidshub.net/image/1828174>) [Public domain], via Wikimedia Commons



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, CharityTracker, to meet the very specific needs of food banks and their partner agencies. Currently, there are 20 food bank networks using Oasis and another 40 using Oasis for their SNAP outreach programs.

Thank you to the following food banks and Oasis network administrators for participating in this report:

### Capital Area Food Bank of TX

Heath Ribordy  
Agency Relations Manager

### East Texas Food Bank

Kirk Goodman  
Program Services Director

### The Greater Boston Food Bank

Jonathan Tetrault  
Senior Manager of Community Initiatives

### Ozarks Good Harvest

Terra Lamb  
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### Regional Food Bank of OK

Rhea Woodcock  
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Doug Eckert  
Supplemental Food Programs Manager

# Building a Partner Agency's Capacity

Jonathan Tetrault serves as Senior Manager of Community Initiatives at The Greater Boston Food Bank, where they have built a network of 600 partnering agencies for food programs and distribution. He shares, "It is great to be a hub and resource for food in our community, but at the end of the day if we don't have strong partnerships, the food in our warehouse doesn't do any good. We can't sit in a corner office of the city and decide how to serve the 190 cities and towns in our service area. We have to empower agencies in our communities to do that." Heath Ribordy, Agency Relations Manager at Capital Area Food Bank in Austin, TX agrees. "My role is to help our partners with meeting the mission because 24 of the 35 million pounds of food we distribute is through our partner agencies. They are the backbone of what we do."

A food bank's network of partners can range in capacity from a rural, church-based food pantry serving 10-20 people a week to a large inner-city shelter providing hundreds of meals daily. Partner agencies follow basic partnership agreements with food banks, including how they store and distribute food as well as meeting reporting deadlines.

Capacity building for partners can happen in a number of ways. For example, the Capital Area Food Bank in Austin gives approximately \$125,000 per fiscal year to partner agencies by way of grants for things like cold food storage. "As food banks realize their vision of providing healthy foods, like more fresh fruits and vegetables, they must equip their partners to accommodate those perishables," says Ribordy.

Food banks give partners support well beyond food distribution and storage, though. "We try to strengthen that network of partners by doing grant programs, best practices, growth planning and consulting with them," says Tetrault in Boston. All food bank agency partners nationwide are required to turn in reports, most of the time monthly, for the pounds of food distributed and the number of people assisted. Since 2011, Oasis Insight has been serving food bank agency relations and program directors by providing affordable client database, assistance recording and reporting solutions. "We are encouraging our partners to move to things like Oasis Insight, which means moving some of them from the index card and shoebox filing system," shares Tetrault.

## OASIS BENEFIT: No More Tally Marks! Improved Reporting

"Some of our agencies will just use tally marks to record their distribution and then they are spending multiple days out of the month figuring out how many people they served," admits Terra Lamb, Community Outreach Coordinator from Ozarks Good Harvest food bank. Equipping her partner agencies with a technology solution is vital. "Improved reporting has been the biggest reason sites are willing to use this system. It is endless in keeping client data," says Lamb.

Receiving quality reports is vital for food banks, not just for their own records, but to report back to Feeding America and the USDA. "My team is determined to get accurate numbers," says Ribordy in Austin. Auditing a partner agency is a regular occurrence. Before implementing Oasis Insight, his team was finding discrepancies. He says, "Now that some of our pantries have gone away from pen and paper and moved to Oasis Insight, when we go to double check their numbers their monthly report to us matches their records dead on. I can definitely tell that pantries seem to get more accurate in reporting."

Of course not all partner agencies were using pen and paper. Tetrault in Boston shares, "There are some agencies who were using Access or Excel. When they switched to Oasis Insight, they found it easier to navigate and the reporting piece not as burdensome."

## OASIS BENEFIT: Data Sharing Options, Walls Up or Down

Oasis Insight offers the option for a food bank network to share their real-time data with one another. If a network collectively decides to share their client data across the network it's called "walls down." Why would agencies want to share certain information?

"We are not the food police," says Terra Lamb from Ozarks Good Harvest food bank, "but a few years ago we noticed a lot of people going to multiple sites to get USDA food. A household cannot receive more than one per month. Some families were going to up to six USDA sites within a month. We wanted to share information so we could better utilize our overall resources and make them stretch out so that multiple families are being served."

When a system is "walls down" clients do sign a Release of Information waiver, being made aware and giving permission for certain assistance record information to be shared across the network. Upon finding a client who is receiving multiple products, workers and volunteers at the pantry or food distribution site are able to offer another layer of assistance. "Our partner agencies will often ask a person looking for additional USDA product 'I see you just received assistance. Is there a reason you are needing help again? Is there more we could connect you with?'" says Lamb. The site will often help them with non USDA food and refer them to additional resources for improving their situations.

Many food bank Oasis Insight networks operate with "walls up" as some agencies have differing privacy policies for client information and food assistance records. "Having 'walls up' is something our member agencies wanted. Agencies only have access to their own data," says Tetrault in Boston.

East Texas Food Bank has a combination of walls down with limited data sharing. Agencies share client data information, like household information, names, addresses, etc., but the actual details of the assistance records are not shared," says Kirk Goodman, Program Services Director at East Texas Food Bank. Goodman and his team have access to all the data, allowing them to pull their own network-wide reports.

## OASIS BENEFITS: Increased Collaboration & Communication

By being 'walls down' and sharing information, not only about clients, but by using the Oasis Insight bulletin board feature, Ozarks Good Harvest has seen increased collaboration and communication. "It has led us to having bigger conversations on ways to work together. Agencies are reaching out to one another. Our agencies really do like the bulletin board on the homepage of the system where they can put out their information, like if something has happened or they have an event going on. It has been a great way for our



### Expanding One Boston Agency's Capacity Beyond the Basement

One agency in Boston's metro region was doing quite a lot of food service for their community out of a church basement and was clearly outgrowing that facility. Without an accurate reporting system, the agency could not really tell a story with the numbers they had.

Jonathan Tretault of The Greater Boston Area Food Bank shares, "We helped them get the technology needed to start using Oasis Insight. Now that they have good data they have been able to use it and form their story, pitching their need for a new facility to their funders and community. They are now in the process of purchasing their own facility and renovating that space so that they can really expand the service they are offering their clients."

Photo: Boston Skyline By Nelson48 at English Wikipedia (Own work) [Public domain]. via Wikimedia Commons

agencies to communicate,” says Lamb. Ozarks Good Harvest has also been collaborating with Community Partnerships of the Ozarks. “We even have other non-food bank agencies interested in tapping into this network or creating their own, wanting to work together to help people get out of the circle of poverty,” continues Lamb.

Collaboration like that doesn’t happen overnight, though. Rhea Woodcock, Administrative Coordinator of Community Initiatives at Regional Food Bank of Oklahoma shares that they are mostly walls up with capability to have the walls down. “For the most part we have kept it closed off because occasionally we get into pantries who really do want to police how much food people are getting. As administrator I can see across the network, but for the most part others can only see that person’s name.” A few of their food pantries are involved in a separate network in Stillwater, OK. “They share a lot of information and are able to tell one another when someone needs a wheelchair or a car. It’s great but it takes a lot of ground work to set a network up like this,” admits Woodcock.

## OASIS BENEFIT: Data Solution for Direct Service Programs

While a large portion of a food bank’s resources are distributed through partnerships, they also have dynamic and growing direct service programs. The Greater Boston Food Bank’s Brown Bag program provides supplemental groceries to 8,438 seniors every month, ensuring seniors don’t miss meals and receive nutritious food.<sup>2</sup> Tetrault says, “Our partners that help run this program had historically been using paper systems. With 800 seniors enrolled in a single site, we could not quickly tell which of those seniors showed up on a particular date or if someone had not been around in a while and if we should be reaching out to someone on the waiting list. There was not an easy way to manage that flow of information.”

Today they use Oasis Insight to track Brown Bag participants and have worked with developers to set up triggers within the system that alert them when a senior has not been there in three months. “We will then move that person to the inactive status and identify someone of the wait list, give them a call or email and invite them to the next distribution,” he says. Service site teams and their volunteers at school-based Boston area food pantries and mobile markets are being trained on Oasis Insight as well.

## OASIS BENEFITS: Customer Service & Customization

Because Tetrault’s team in Boston handles all of the data analysis for the food bank, they were constantly pouring over reports and information. Finding some questions and holes, they decided to improve the consistency and accuracy of the data by encouraging partner agencies to move to a more automated system. Why did they choose Oasis Insight? “There were some other solutions that did similar things and cheaper, but they were primarily single person shops. We weren’t confident or comfortable that if something happened, there would be a support system for the agencies to use. We really honed in on the support that came behind Oasis Insight,” says Tetrault.

One thing that surprised him during the development and implementation of their Oasis Insight network was the amount of customization needed. He shares, “Agencies use data in different ways. This led to more customization than I had anticipated. Each agency has different buckets or status identification systems. It’s not just when a client last came in, but they needed to parse client base in different ways.” Oasis Insight works to meet the needs of each specific network, which means each one has its own level of customization.

Terra Lamb at Ozarks says she has continual customizations. She says, “I ask Oasis Insight customer service all the time ‘Can we add this?’ They are always more than willing to find ways to make it happen for us.” Heath

Ribordy in Austin agrees. He has a few agencies who use Oasis Insight very robustly and are always looking to make additional customizations. He explains, "For the most part I have been able to adopt their suggestions for the entire network's use and have Oasis Insight implement the changes. Sometimes an agency will want to implement something that not every agency has in common. So, we have even worked with Oasis Insight to do some specific 'one-off' additions for those requesting it, not a global change to the network. Oasis Insight has always been open to talk about anything we need."

## Champions for Change- Implementation Best Practices

Getting partner agencies to come on board with new technology solutions is not an easy task.

East Texas Food Bank has made Oasis Insight a normative part of being a partnering agency with 150 agencies on the network and only five pantries using a different system. How has this food bank achieved such wide-spread participation? A key to their success seems to be a well-thought out implementation process. Goodman explains, "I think we were pretty smart about how we brought agencies on board. We broke our network into four different groups. Every three months we brought in a new group to train and implement the system. The first two groups were made up of people and pantries that were volunteering to move to the new system. They wanted it."

By the end of the year, Goodman found that those who were previously resistant had come around because others were already using Oasis Insight and proving its value. The late adopters followed those early adopters. "Another thing that helped was we let partner agencies write for grants for computers," he shares. Goodman also attributes some of the success to Oasis Insight's support and training team. "They were good at working with our agencies and really patient with us."

### Good Data Analysis Can Challenge Misconceptions of Food Insecurity

There are diverse opinions about public assistance programs. Capturing data, aggregating it, and analyzing it can give a food bank a more accurate story of those coming through their partners' doors and receiving food assistance.

Kirk Goodman of East Texas Food Bank says he runs network-wide reports of assistance in a year by client households. It tells him a story. "Our average clients visit a food pantry six or seven times a year. There are several months where they are not visiting. Almost 25% of our clients only come one time a year. There are comments these days about people living off of the system. 25% of people coming only once a year is not evidence of someone abusing the system. That is someone who needed help, got it, and then went back about their business," he says.

Goodman uses this data to inform partner agencies and the community, helping people understand the narrative of hunger insecurity in East Texas.

*By Bill Branson (Photographer) [Public domain], via Wikimedia Commons*



Lamb at Ozarks Good Harvest is making headway on moving more agencies onto their network. "In this past year, I am adding about one new site a month to the system. The biggest benefit for sites to come on board is the reporting. Another thing that I am doing is making it required for new partnering agencies," she says.

Among all the food banks, it's clear that implementation takes time, patience as well as an amount of persistence. "We have been slower than some to roll out. I think the biggest bottleneck is my capacity to sit with folks and talk with them one-on-one about the benefits and encourage them to move forward," says Tetrault.

Ribordy in Austin admits that it was more difficult than he would have thought. His predecessor brought Oasis Insight to their partnering agencies en masse as a mandatory requirement. He shares, "My biggest surprise was how many partners were offended by that. They really didn't want to be forced into something." When Ribordy stepped into his role, he did not make it mandatory but has worked with agencies to promote and implement the system. He shares, "Once an agency comes on board, they have not gone away from it. Retention is very high. Oasis Insight becomes a pantry's backbone once they really start using it."

## Running into Challenges and Overcoming

Some challenges to implementation are difficult to overcome. Doug Eckert at Regional Food Bank of Oklahoma admits, "Our pantries in the rural areas are run by volunteers. People in the rural areas don't even have internet connection at their pantries. We went through a major capacity building time a couple of years ago and one of the things that we offered were grants which some agencies could use to buy computers or internet connection. It was awesome for the few agencies who did this, but with 400 agencies it was a drop in the bucket."

All of the food banks in this report have offered some level of computer or internet support for agencies. "Some of our extremely rural areas have a hard time even getting internet. We have taught them how they can use the system offline, printing off a master list then doing the data entry at a later time," says Lamb

## Funding Models for Oasis Insight

All the food banks interviewed for this report fund the licensing fees and active user costs of Oasis Insight to one degree or another. East Texas Food Bank was able to secure their initial start-up funding for their 150-pantry network through a TANF grant program awarded in 2010. "That provided funding for two years and we have been able to write for various grants to fund it ever since," says Goodman.

Several food banks have launched their initial start-up, implementation and customization of Oasis Insight through infrastructure grants. In Boston, Tetrault says that they share information about technology and reporting improvements with particular funders who get excited about data and process improvements. "It's not something you will find on our web site, but the development team knows what donor interests are and will share updates with them accordingly," he says.

The Greater Boston Area Food Bank and Ozarks Good Harvest fund partner agencies' use of Oasis Insight for the first year. Boston's food bank also pays for data migration if the partner agency wants to move their previous data into Oasis Insight. After the initial year, the agency is billed directly. Tetrault shares that as far as he knows, no one has had to abandon the system due to cost.

Capital Area Food Bank of Texas, East Texas Food Bank and Regional Food Bank of Oklahoma fund the use of Oasis Insight for partner agencies continually. "It is a budgeted item and we find Oasis Insight so affordable. If

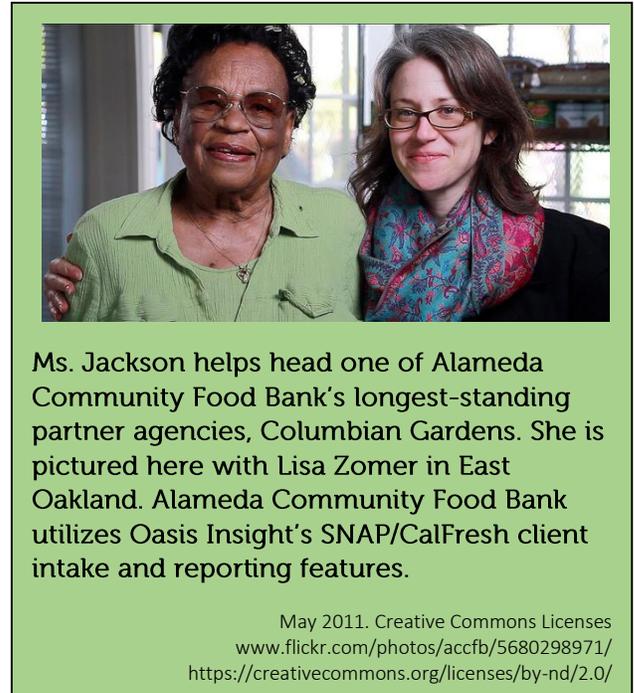
an agency wishes to upgrade something for their specific use, they may pay for that on their own," shares Ribordy in Austin.

## Effective Training: Less Time at Steel Filing Cabinets

Effective training is vitally important, as a majority of volunteers are elderly. According to a national study conducted by Home Instead, Inc., 52% of seniors volunteer their time through unpaid community service. Of those that volunteer, 42% say they volunteer with organizations to prepare, collect or distribute food.<sup>3</sup> "Most of our partner agencies are managed or run by volunteers that are elderly. That can be a challenge when you are talking about a web-based system," says Ribordy.

"I find older volunteers are concerned they will break something," admits Woodcock from Oklahoma. For that reason, it is critical for people to see a demonstration followed up by letting them 'drive' for a while. Lamb in the Ozarks says she does a lot of role playing during training. "At first it was very intimidating because it was a computer system but as soon as they saw it and how easy on the eyes it ways, and the colored tabs, they were less concerned. We have some volunteers in their late 80s and early 90s we have trained on Oasis Insight. After using it for a month they tell me they don't know how they used to do without it!" she shares.

Tetrault trains by showing the comparison between their old filing systems and the new virtual one. "I tell them to imagine they are walking up to their old steel filing cabinets. You have your main tab on the right and here are your drawers. Open the drawers and you have your subtabs, and client folders. Describing it this way helps them latch onto it fairly easily, because we've all spent many hours in front of those steel cabinets!" he says.



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

<sup>1</sup> Hunger in America 2014 Executive Summary by Feeding America. Accessed on Sept. 24, 2015, [www.feedingamerica.org/hunger-in-america/our-research/hunger-in-america/](http://www.feedingamerica.org/hunger-in-america/our-research/hunger-in-america/)

<sup>2</sup> Brown Bag Program. Accessed on Sept. 24, 2015. <http://gbfb.org/our-mission/brown-bag-program.php>

<sup>3</sup> Home Instead US Executive Summary. Accessed Sept. 28, 2015, <http://www.salutetoseniorservice.com/volunteering-seniors/benefits/>