

Case Management Services

A Repeatable Solution Offering — From Rolling Meadows to Every State

The Opportunity

A PATTERN BEYOND ROLLING MEADOWS

- **Municipal and local human services departments nationwide share the same structural pain points:** fragmented case management across subdivisions or programs, manual referral tracking to state benefit systems, and thin outcomes reporting for councils and grant funders.
- These departments sit outside core state DCF pipeline, but they are reachable through the same specialist case-management capability, at a smaller, faster, sole-source-sized scale.
- Rolling Meadows, IL is the first fully scoped example of this pattern, and a template for replicating the approach in any state.

THE SOLUTION OFFERING

What We Deliver

- **Unified Client & Case Record:** One record spans every subdivision or program a resident touches.
- **Case Management Workflow:** Intake, assessment, notes, tasks, and closure in one guided path.
- **Configurable Forms & Programs:** No-code form design; each subdivision modeled as its own program.
- **Referral & Hand-off Tracking:** Logs outbound referrals and hand-offs, with outcome status.
- **Enhanced Search:** Fast, filterable, full-text search across residents and documents.
- **Secure File Upload System:** Drag-and-drop documents, auto-categorized, role-based access.
- **Reporting & Outcomes Dashboards:** Council- and grant-ready reporting, built in, not bolted on.
- **Role-Based Security & Admin:** Subdivision-scoped access; staff maintain it without vendor help.

Proof of Concept

Rolling Meadows, IL : Our Solution

- Full structure and case management workflow brief across four subdivisions: Community, Police, Mental Health, and Senior Social Services.
- A Business Requirements Document mapped feature-for-feature to a real commercial case management platform
- An interactive, clickable mockup demonstrating the unified record, referral tracking, and reporting dashboard in action.
- A right-sized project approach: fixed-price, weeks-not-years delivery with lightweight governance built for a municipal budget.

Why it Travels

Built to Repeat, State to State

- A framework build to customize the solution as per the specific need of the state
- Sole-source-sized scope fits municipal and county procurement thresholds without needing a state-level prime contract.
- Applicable anywhere a local human services, social services, or family services department coordinates multiple programs under one roof.

NEXT STEPS

Target: municipal and county human services departments in any state with a similar multi-program structure.

Entry offer: a 4–6 week Case Management & Referral Coordination Assessment.

Let's talk at ISM 2026 (Spokane, WA · Sept 27–30).