

Driving Efficiency and Cost Savings While Putting Constituents First



A nurse and single mother is at risk of losing the job she relies on to support her family, held back by urgent but solvable financial barriers. She reaches out to her county for assistance. She not only hears back right away but is also quickly referred for essential support: a laptop to complete education credentials, work-appropriate attire and funding for car repairs. Behind the scenes, a secure technology platform powers the entire process, enabling staff to track multiple referrals seamlessly, coordinate across government agencies and community partners, and help the client move toward lasting economic stability.

This isn't a hypothetical scenario. It's a real story from Summit County, Ohio, where a working mother's path to self-sufficiency was supported by secure data-sharing infrastructure. Scenarios like this are becoming increasingly common as agencies modernize service delivery. Facing pressure to operate more efficiently, state and local leaders must ensure their programs deliver measurable improvements.

With a full suite of solutions backed by secure data-sharing infrastructure (including closed-loop referral systems, predictive analytics, data insights and funding management tools), agencies can reduce administrative burden for their staff, save time and money, and deliver more responsive services to constituents.

What's Holding Agencies Back?

Outdated, manual workflows

Many government workflows still depend on manual, paper-based processes, placing unnecessary burden on employees. It's common for staff to track down information every day, making repeated phone calls and reentering data. These processes are a drain on time, money and staff capacity. They also create more opportunities for errors, such as misplaced files, duplicate records and incorrect data entry.



Disconnected systems

Besides being slow, clunky and difficult to maintain, legacy systems are also fragmented and disconnected.

Although multiple agencies may serve the same population and even work simultaneously on the same case file, they often operate in silos, using incompatible systems that can't exchange data.

"Without shared data or coordinated workflows, agencies redundantly collect information from people, increasing administrative costs and frustrating constituents," says Morgan Wright, a senior fellow with the Center for Digital Government.

This lack of coordination results in duplicate services, extended wait times and growing frustration for staff and the people they serve. Without a secure system for agencies to share casework data, important information is bound to be lost or become outdated. This leads to missed opportunities for support and unmet critical needs.

Negative perceptions of automation

In today's era of AI and automation, constituents increasingly expect their government to deliver the same on-demand, rapid customer service experience they're used to getting from the private sector.

"There is concern that automation could compromise service quality," says Halima Ahmadi-Montecalvo, vice president of research and evaluation for Unite Us. "With the right safeguards, however, technology can enhance quality and improve outcomes."



Technology as a Partner

Introducing new technology and processes has traditionally felt risky in government, especially for staff accustomed to long-standing workflows. That's why the right solution will be supported by a partner that offers proper onboarding, ongoing training and the infrastructure needed to set teams up for long-term success.

Beginning with procurement, it's important to establish trust among users and get their feedback.

"Agencies must involve frontline staff and constituents in the procurement process through user-centered design workshops or pilot programs," Wright says.

To onboard new solutions and tools, leadership should champion changes with clarity, consistency and empathy. By being transparent about how new technology will be used, agencies can calm nerves and generate support.

Agencies should also provide hands-on training, workshops and other learning opportunities. Most importantly, leadership should give staff time to adapt.

Frontline staff will work with the tools to interact with constituents. Their use, comfort and understanding of the system is paramount to service delivery.

When constituents have more positive experiences with agencies, their confidence and trust in government support grows.

"These are the people who are going to use the technology every day," says Taylor Mason, director of public affairs for Unite Us. "They're the ones who are going to determine whether or not the public has a good experience with the technology and with the agency as a whole."

To minimize onboarding challenges and prepare for long-term success, government agencies should choose a technology partner that understands the need for clear, user-friendly workflows and operations.

"Agencies should ask vendors to demonstrate how solutions integrate with existing systems and support future growth," Wright says.

While platforms can deliver immediate results in the way of systems interoperability, streamlined workflows, reduced manual tasks and improved real-time data access, most efficiency gains come after full implementation and widespread user adoption.



Providing More with Modernization

Most immediately, modernization strategies can help agencies reduce administrative burdens, cut unnecessary costs and save time. But efficiency gains also empower government employees to serve constituents more effectively.

For example, modern solutions can improve interoperability and eliminate manual, paper-based workflows. This translates to more resources and hours to serve the public.

“When government employees can shift their focus from administrative tasks to delivering services, that’s when we start seeing real improvements in outcomes for the public,” Mason says.

From there, the benefits compound. When constituents have more positive experiences with agencies, their confidence and trust in government support grows.

Tools for Unlocking ROI

Not all technology solutions are created equally, and not all deliver real-life impact. Agencies should prioritize partners that offer more than just digital infrastructure. They need solutions that generate measurable outcomes and sustainable ROI. The right technology can reduce administrative overhead, accelerate time to service and unlock millions in cost savings.

Real-time data

Despite major strides in data science and analytics, many government agencies continue to rely on outdated or incomplete information to guide critical decisions. As a result, policies are being shaped, strategies developed and resources allocated based on data that

Modernization isn’t just about keeping up with technology. It’s about choosing systems that demonstrate their worth in real dollars and results.

may no longer reflect current realities — undermining both effectiveness and public trust.

Adopting platforms, tools and data-sharing frameworks that enable access to real-time information can significantly improve service delivery by empowering staff and policymakers to act on timely, relevant insights.

Agencies should prioritize onboarding systems that surface current, hyper-local data to identify constituents’ precise needs and guide more targeted plans.

“To meet community needs effectively, agencies need data that reflects local realities,” Ahmadi-Montecalvo says. “That community context is key to designing and delivering relevant and successful programs.”

Predictive analytics

States manage billions of dollars in program funding, yet much of this spending remains reactive and fragmented, with limited evidence of ROI or improved outcomes. Predictive analytics benchmarked against validated health and economic outcomes provide governments with a powerful new path forward.

By tracking data points related to self-sufficiency, predictive models can identify emerging needs, learn from referrals and outcomes, and prioritize interventions based on risk and service gaps. This approach allows governments to align resources with strategies that deliver measurable results, reduce duplication across sectors and design programs that help individuals achieve lasting independence.



A closed-loop referral model

When a constituent comes to a government agency for help, it's not enough to give them a pamphlet and send them on their way. Instead, agencies need modern systems capable of tracking if constituents get the help they need.

This closed-loop referral model brings accountability and transparency to efficiency. Instead of just focusing on vanity metrics, this model focuses on constituents' real-life concerns so that their needs are met, not simply recorded.

"A good metric isn't just tracking if an individual got information about the services they need," Mason says. "It's tracking whether they actually got access to those services and how that impacted their life."

Secure data sharing and seamless collaboration

Fragmentation, disconnection and data silos are among the biggest obstacles to improving government services.

Decision-makers should look for platforms that enable interoperability and real-time data exchange across agencies so staff can coordinate constituent care without friction. Specifically, these platforms should include features like secure, HIPAA-compliant chat to facilitate easy communication among case workers.

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— Taylor Mason, Director of Public Affairs, Unite Us

Cross-agency collaboration can be complex, time-consuming and confusing — and the consequences can be severe.

"When the process becomes too complicated and inefficient, people simply give up," Mason says. "And when someone in crisis doesn't receive the help they need, it often leads to even more crises, resulting in greater costs and long-term challenges."

Platforms that simplify, streamline and accelerate cross-agency collaboration do more than improve workflows and optimize costs. They help individuals get the care they need.

Baked-in scalability

Agencies' needs are constantly evolving, so technology must keep up.

When onboarding new platforms to modernize and optimize operations, agencies should look for solutions that can scale with workloads so staff can expand service capacity without losing quality or control.

"When an individual first seeks support, they may just work with one agency, but eventually, they may become involved and engaged with several different agencies," Mason says. "Ensuring that data is consistently synchronized and up to date across all agencies is crucial for connecting individuals with services and support."



COUNTIES CUT COSTS WHILE PROVIDING BETTER SERVICES

Government agencies that rely on outdated, manual systems face numerous challenges, including inefficiencies, service delays and higher administrative costs.

Summit County, Ohio, and Gwinnett County, Georgia, are just two examples of governments that chose a different path. By implementing secure technology infrastructure, they transformed the way they deliver services.

Gwinnett County, Georgia

Located in northern **Georgia**, **Gwinnett County Health and Human Services (HHS)** faced significant operational challenges in managing its referral and support processes, often relying on manual tracking through spreadsheets and repeat phone calls.

Gwinnett County HHS replaced fragmented tracking by implementing a closed-loop referral platform and analytics tools from Unite Us, a technology company that specializes in government. No longer tied to redundant data entry, caseworkers now access complete client histories instantly and coordinate services more efficiently.

The results have been significant with estimates of nearly 2,000 staff hours saved, \$200,000 in avoided healthcare costs and \$3 million in increased household funds for residents. Standardized data collection and real-time reporting also empower the agency to identify service gaps, generate seamless

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monthly reports and share insights with county leadership.

By modernizing its infrastructure, Gwinnett County improved efficiency, transparency and measurable impact — raising the bar for how local government can meet community needs.

Summit County, Ohio

Summit County, the fourth-largest county in Ohio with a population of more than half a million people, reported \$3 million in estimated cost savings and nearly 600 hours of reclaimed staff time after implementing a secure data-sharing infrastructure from Unite Us.

Previously, the Department of Job and Family Services faced challenges with manual processes and fragmented communication among providers. The county sought a solution to improve how it delivered support to working families. The new infrastructure allows staff to track outcomes, streamline communication with community partners and reduce administrative workloads.

County officials say the transition has improved transparency, reduced duplication of services and enabled more timely support for constituents.



Best Practices

Build partnerships

Keeping community partners informed and engaged should be a top priority. These relationships lay the foundation for successful modernization initiatives. This way, teams can establish trust and understanding, align expectations, and set the stage to work together when challenges arise.

When everyone is kept in the loop, roles are clearly defined and processes are agreed upon early, agencies manage projects and measure impact more effectively.

“If people don’t understand the ‘why’ behind an initiative, they won’t stay engaged,” Ahmadi-Montecalvo says. “Clarity and communication are the foundation of any successful implementation.”

Evaluate from the start

Evaluation shouldn’t be treated as a final step of a project. Instead, organizations should adopt solutions that enable continuous tracking — measuring outcomes, monitoring progress and adapting along the way.

Ongoing evaluation and improvements ensure that technology isn’t just implemented and left to stagnate but meaningfully used to efficiently serve constituents’ needs.

Value public feedback

While pursuing improvements, it’s easy to become overly focused on metrics and lose sight of broader

goals. As agencies adopt platforms to streamline workflows, eliminate redundancies and optimize operations, every KPI and metric should tie back to the constituent experience.

Agencies should embed public feedback mechanisms like surveys, interviews and focus groups into their processes. That input should inform decisions and guide adjustments.

“Quantitative data can show us trends and patterns, but qualitative data helps us understand the reasons behind them,” Ahmadi-Montecalvo says. “To truly understand if we’re meeting constituents’ needs, we have to listen and collect feedback from the public.”

Focus on outcomes

The hard numbers don’t always reflect improved outcomes.

Agencies should go beyond simple usage metrics and dial into impact-driven KPIs that measure whether services were delivered and whether they made a difference. Depending on the agency, that might mean looking at reduced emergency room visits, better Medicaid utilization or fewer repeat crises.

Innovative technology can reduce manual tasks, ease administrative burdens and streamline workflows. But true efficiency gains aren’t only about tracking time and money saved; they’re also about empowering end users to deliver better outcomes that improve constituents’ lives.

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— Halima Ahmadi-Montecalvo, Vice President of Research and Evaluation, Unite Us



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Founded in 2013 by Military Veterans, Unite Us is the nation's premier technology provider for integrating health and community-based care. Our proven product suite is used to proactively identify needs using advanced analytics, coordinate services between sectors in real-time, streamline referral and case management, and facilitate eligibility assessments and reimbursements across government, healthcare, health plans, and community organizations. The first of its kind, our closed-loop referral system prioritizes privacy and dignity and has integrated data and analytics tools used to measure impact, optimize programs, and shape policy. With over 1.7M services, we host the nation's largest network of community-based health and economic services dedicated to improving whole-person health.

Learn more at UniteUs.com.