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Alzheimer Society of Durham Region

Whitby, Ontario

BENEFITS OF BONTERRA PROGRAM MANAGEMENT'S PENELOPE SOLUTION

- *User-friendly system.*
- *Improved staff accountability via generating own reports.*
- *Increased efficiency and improved reporting.*
- *Tasks and reminders help prioritize client needs and improve service delivery.*

INTRODUCTION

The Alzheimer Society of Durham Region (ASDR) provides support programs, educational resources, and referral services to ease the burden of care and improve the quality of life for people living with Alzheimer's disease and other dementias, as well as for their care partners and families.

The Whitby, Ontario-based agency selected Bonterra Program Management's (formerly Social Solutions) Penelope solution platform to help manage their client information, track client progress and outcomes, document notes and clinical information, and manage appointment scheduling and attendance.

PENELOPE HELPS INCREASE EFFICIENCY AND IMPROVE PROCESSES

As Gillian Barrie, director of clinical services at ASDR explained, since completing the initial implementation of Penelope, they've expanded the use of the solution across the agency and have also started to take advantage of Penelope's suite of client engagement features to make their referral process easier.

"Recently we started using the Add. Me feature, which is a web-based referral form that is secure," she said. "Our referral partners are able to use that web form very easily and the information goes directly into our secure client database. And we're finding, especially with the current climate, that a lot of people are working remotely, they don't have access to a fax machine to send in a referral, so having a web-based option has been incredibly important for us."

> " We're able to attract potentially new funders or new grants because we know we will be able to report on what's required."
>
> — Gillian Barrie, director of clinical services at ASDR

ASDR worked with Bonterra Program Management's experienced Tailored Services team to help build and implement the web form, which allows the organization's community partners to enter a referral directly from the ASDR website and have that information saved seamlessly in Penelope.

"We worked with Tailored Services for our web form development and it was really wonderful to be able to sit down with someone and they understood what we trying to achieve," said Gillian. "We needed to have a web form that was bilingual and so they were very helpful in being able to build that for us. We try to be as efficient as possible, and I think that *it allows us to retain the arrangement we have with our existing funders and know that we're reporting back on something that is accurate.*"

ACCURATE DATA AND FLEXIBLE REPORTING

As a charitable organization, ASDR relies on grants and other funding sources to allow them to continue providing support services to their community.

"We have to be incredibly efficient, incredibly nimble, in how we use those funds," said Gillian. "And we have an obligation to report back on those funds. So we really require accurate statistical data that is able to tell our funders exactly what we're doing and what we're using their money for."

Reporting to different entities means there's no one standard report that's needed. Gillian said Penelope's solution to query the database to create custom reports have enabled them to meet their varying reporting needs.

"We pull the raw data and we're able to use it as we need," she said. "The process of building custom reports is more for those external reports that we send to our funders because they are a little bit more in-depth (and) they often change, in terms of requirements. So it's definitely something that we're constantly trying to improve on, and we're always looking for ways to enhance our capacity because what we don't want is staff time being taken up running reports. It's something that we need to be able to do quickly."

Gillian added: "We sometimes will have new grants or funding requirements that come in that we weren't expecting, so if we can use the front-end reports very quickly to pull that information, that is a huge advantage," she said.

Having confidence in the accuracy of the data stored in Penelope is critical, Gillian said.

"For our existing funders, we're confident in what we would provide to them, but then also *we're able to attract potentially new funders or new grants because we know we will be able to report on what's required.*"

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Adopting Penelope has also helped ASDR assess the growing need for their services in the community, especially during the COVID-19 pandemic.

"For us, it really helps us plan our upcoming programs and services, but *it also allows us to report back on our performance and the demand for our services*," said Gillian, adding that this can also help determine if new funding is required for additional staff and services.

Knowing that the system is ISO certified for its information security management systems provides ASDR with peace of mind with respect to data security and privacy concerns, Gillian said.
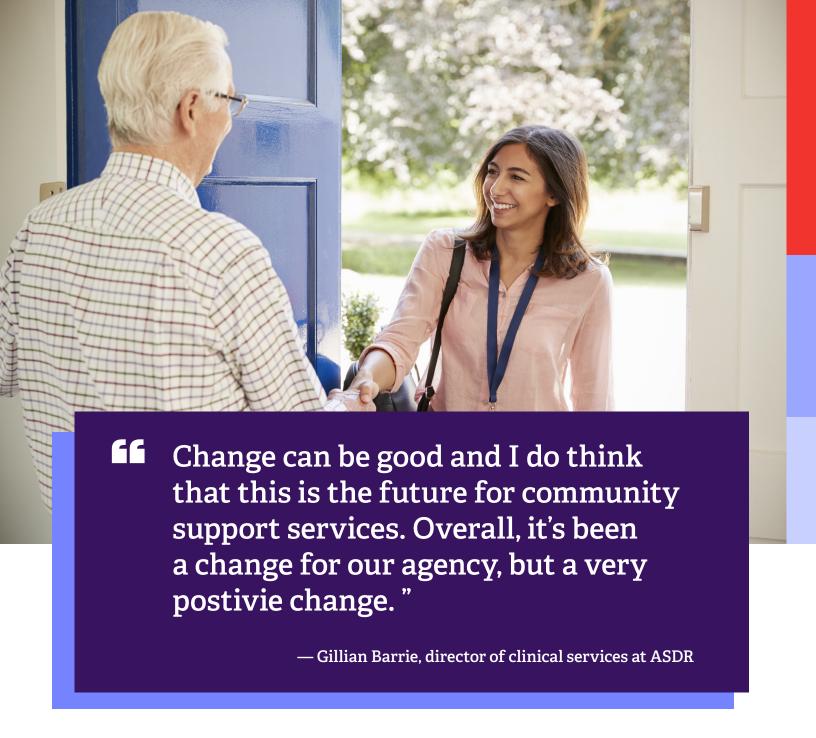
"Going through Penelope and using the Add.Me feature, *we knew that that would allow us to have a very secure way of client data being completely safe going into our system.* Privacy for us is such a huge piece of being a health care custodian," she said. "Knowing that our client database meets all of those requirements for us, it gives us much more confidence."

Adopting a new client management platform like Penelope can be a big change for any organization, but Gillian said that the solution's user friendliness and Bonterra Program Management's experienced support teams can help ease the transition and the stress.

"I would say it is easy to use, it's intuitive, not to be afraid of change," she said. "I think our team would agree that it is user-friendly and, honestly, having a great support team – we feel we can always go to the Penelope team, they're very helpful with whatever our needs might be. It was a pleasure working with Tailored Services on our web-based referral form. We always feel like we can go to them."

If your organization is looking to improve efficiency, ease reporting, and save time for staff, contact us to schedule a complimentary consultation with Bonterra Program Management.

> **"** Change can be good and I do think that this is the future for community support services. Overall, it's been a change for our agency, but a very postivie change. **"**
>
> — Gillian Barrie, director of clinical services at ASDR

Ready to create lasting social change? Get in touch today.

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