Bonterra

Brooklyn Community Services transforms operations across 40 programs

With over 40 programs operating out of 26 locations around Brooklyn Community Services (BCS) partners with people to overcome obstacles on their pathway toward self-determination.

CUSTOMER
Brooklyn Community Services

SECTOR
Children and youth services, supportive services

PRODUCT
Bonterra Apricot

Ever wonder just how profoundly a nonprofit can permeate and lift up its community? Look to BCS. Since 1866, founded on the principle of neighbors helping neighbors, BCS has worked in neighborhoods impacted by systemic poverty. Today, the agency continues to strengthen communities by fostering the educational success of children, the leadership development of youth, the employment and housing stability of adults, the advancement of individuals living with disabilities, and the empowerment of seniors and families.

BCS roots its work in the struggle for social justice and, through action and advocacy, commits to shining a light on barriers that perpetuate inequitable systems as a part of the collective effort to ignite change.

Challenges prior to Apricot

Internal referrals, multiple data tracking systems, and technical limitations

Due to its diverse funding streams, program locations distributed over a wide geographic area across the Borough of Brooklyn, and recent mergers with other local nonprofits, BCS has grappled with maintaining streamlined internal communications, data aggregation, and cross-departmental workflows. Because programs are geographically siloed, BCS lacked a singular database platform that would allow ease of data sharing, including a way to easily manage internal referrals between programs, making it difficult to connect participants to additional beneficial services within BCS. There was a need to bring all of the various sites and departments together through mutual referrals and technical and administrative support. Moreover, the requirements to track program data in third-party funders' proprietary databases presented a need for a data management system with broad reporting and integration capabilities, attributes that were insufficient in BCS' legacy database.

Time-consuming report preparation

Many BCS programs that serve individuals with developmental disabilities are reimbursed for services through Medicaid and Medicare. One such program is Day Habilitation, which helps adults with developmental disabilities to maximize independence in daily living, personal health, and socialization. Prior to implementing Apricot, preparation for biweekly billing reports regularly took the program director and other staff two to three days to complete, having to sift through multiple Excel sheets and paper service logs to pull together and manually cross-reference data from all participants and caseworkers.

5–10
hours per week saved

The Day Habilitation program gains efficiencies using Apricot reporting.

> **"** Because we have a large number of users, 170 right now and we're growing to 185, we built a report to show who actively uses the system in a given time period. So now, we can pinpoint who needs an account or who needs to use it more, which has helped us manage users."
>
> — Stephen Crano, Data Management Analyst
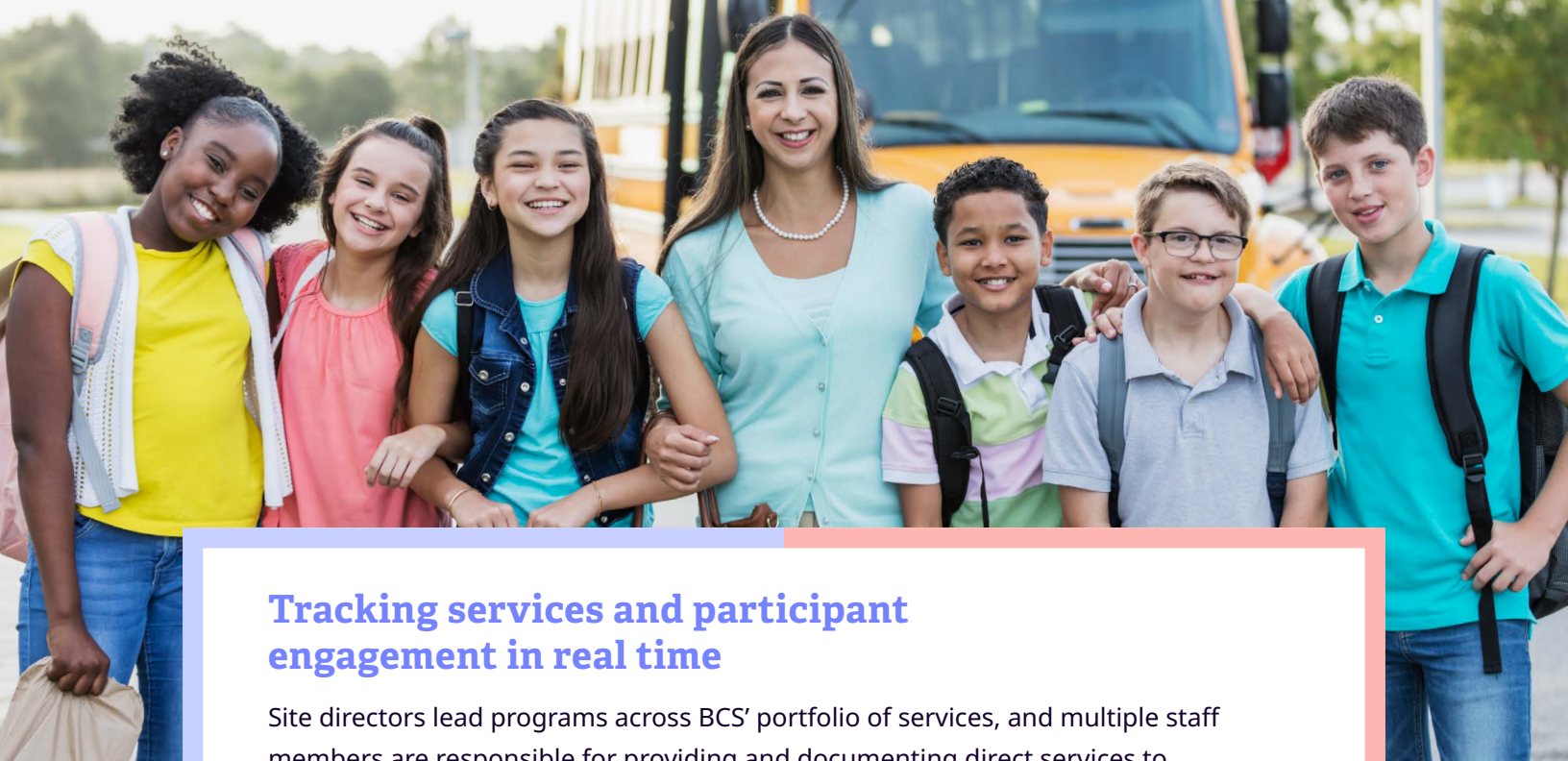
Tracking services and participant engagement in real time

Site directors lead programs across BCS' portfolio of services, and multiple staff members are responsible for providing and documenting direct services to participants. Because government funding agencies require regular submissions of quantitative and qualitative data documenting participants' progress, it's crucial that BCS administrators have the ability to build custom forms and reports in their data management system, and that program leaders can track their participants' progress toward goals and milestones. Without an easily customizable database with dynamic search and reporting capabilities, leaders of BCS programs like Youth Stand United, an education and skills development program serving youth and young adults in South Brooklyn, would often have to track data in spreadsheets, on paper forms, or in word processing documents.

> **"** I'm very proud of all the administrative functionalities we've been able to get out of Apricot. That wasn't anticipated or part of the rollout plan. We have forms to track workflows and the status of tasks over extended periods of time for a lot of different administrative functions."
>
> — Stephen Crano, Data Management Analyst

Solutions

Smoother communications, data sharing, and internal referrals processes

Over the course of more than a year of staggered implementation, BCS rolled out Apricot as their primary program and administrative database system agency-wide. It is the hub of all things data-related, from program participant demographics, enrollments, and services to incident reports, internal referrals, and maintenance requests. In addition, program staff may consult an internal program and employee directory to identify additional services that may benefit their clients and then reach out to their colleagues to initiate internal referrals.

The site-based permissions settings in Apricot ensure that participant information is kept secure and only accessible to relevant program staff members and administrators. The import interface allows administrators to quickly update entire programs' rosters at once with data pulled from funders' proprietary sites.

BCS development staff is able to quickly pull program- or division-specific reports of participant demographic information required for grant applications. Looking ahead, BCS is working with their Apricot account managers and support specialists to identify opportunities to integrate their system with external databases to further simplify data collection and reporting processes.

> **"Many people wouldn't initially think a database could be used to do something like this. Our client survey distribution was a great first effort, and I'm really happy that we can now start looking at responses and sharing it with departments, program directors and executive staff."**
>
> — Alba Rodriguez, Chief Strategy and Data Officer

Complex reports pull instantly

Thanks to Apricot, the billing process for BCS' programming for the developmentally disabled has been tremendously refined and expedited. Now, their software immediately converts data of services delivered into billable units in an exportable document formatted for submission to a third-party billing agency. All that is required now is to enter a date range, and Apricot does everything else. "A process that would previously take two to three days now takes literally 20 minutes; it's one of the best features that I really, really like about Apricot," says La'Kisha Alvarado, the supervisor who oversees BCS's Day Habilitation, Community Prevocational, and Lifelong Enrichment programs, all of which utilize this tool.

Dynamic reporting and monitoring participant progress

Apricot offers a simplified dashboard view, allowing program directors to see essential information all at one glance, including names of program participants and staff activities. One can see, for example, how many progress notes each staff member has completed in a given time period, any existing gaps, and possible opportunities to improve and augment services.

Symphoni Samuels, the director of Youth Stand United, now has a report that allows her to track service activities by multiple criteria, either by participants or by staff members, to ensure that her staff members are entering data in a timely manner. She highlights the flexible filtering and reporting capabilities as key features of the solution. Without the ability to run time-bound reports of services by staff members, service type, or program participants, submitting data to funders at regular intervals would be far more time-consuming. In addition, monitoring participant engagement and progress in real time would be nearly impossible. Says Symphoni, "We use it every day, for everything."

Working through implementation

For organizations as large as BCS, change management and implementation can present challenges. But La'Kisha, whose programs were some of the first in the agency to utilize Apricot, is proud to share the accomplishment of working together with her team to successfully implement the system: "When staff is accustomed to doing something one way and then you show a new system, there can be resistance; they may not want to put the effort into learning it."

For a social services agency as big, diverse, and responsive to its community as BCS, implementing any database system is a challenging and continual process. New programs start, and legacy programs end while others scale up or wind-down based on the current needs of Brooklynites. By creating solid deadlines, ensuring staff is meeting them and providing support in retraining when needed, BCS has set up an efficient system that has become simple and repeatable: Program directors meet with the internal Apricot system administrator to identify the data that must be tracked to satisfy funders requirements, then a process of iterative development and review takes place over several weeks to build out new forms, train and gather feedback from end-users, make revisions, retrain end-users, and provide support through and beyond system launch.

Unforseen administrative and workflow benefits

When BCS purchased Apricot to replace its legacy database, they intended to use it primarily to track program enrollments, services, and participant demographic and contact information. But since their initial buildout, they have found that the system can be used to simplify many common administrative workflows involving information management. For example, administrative forms now hosted in Apricot include:

- Maintenance requests
- Merchandise requests
- Volunteer applications and assignments
- Contracts and grants information
- Incident reports
- Internal and external surveys

One centralized case management system

For 40+ programs, 20+ sites, six administrative departments

Supports: Facilities, marketing and communications, grants, volunteers, contract management, and government grants

Bonterra™

Prior to implementation of Apricot, maintenance requests were submitted through a ticketing system that did not allow the facilities team to search by services requested or location, and there was no way to prevent duplicate ticket entries; merchandise requests were handled through electronic survey forms that couldn't be customized to fit the marketing teams' exact needs, which caused confusion for program staff completing them; volunteer assignments, contracts and grants, and incident reports were all tracked in electronic spreadsheets that lacked consistent formatting or reliable search capabilities; and other surveys were primarily completed by hand and later coded into spreadsheets.

A lot has changed in a short time. Facilities managers now receive automated emails alerting them when new maintenance requests are submitted. They can assign tasks to individual maintenance workers, send updates to the staff who submitted the requests, and submit purchase orders all from their Apricot dashboards. In addition, merchandise request forms are now streamlined and easy to submit and review, eliminating the need for additional back-and-forth communication between administrative and program teams around simple tasks.

Volunteer applications are now submitted directly to Bonterra, triggering automated alerts to volunteer coordinators to review and reach out to applicants. Volunteers are also given access to update their personal and contact information and log their service hours through Apricot's Connect feature. Additionally, the grants, finance, and executive team members have a user-friendly, universally accessible platform to share documents and collaborate on proposals and contract management.

Today, agency-wide incident reports are better organized, consistent, and readily available for review by its committee each quarter.

BCS utilized Apricot's Intake Form feature to disseminate and capture responses to its first agency-wide diversity, equity, and inclusion (DEI) staff survey and its first agency-wide client satisfaction survey. This tool allowed staff and clients to submit survey responses on computers or smartphones while administrators collected the responses that individuals chose to submit in hard copy.

BCS creatively used Apricot's Intake Form to implement its first universal client satisfaction survey across all its programs. Flyers with QR codes were printed to be scanned by smartphones, leading to the survey about their client's program experience. Across the agency, they received over 700 responses. Next, survey results were parsed by division and program, analyzed in-depth, and shared across the organization. Alba Rodriguez, chief strategy and data officer, says, "I think many people wouldn't initially think a database could be used to do something like this. Our client survey distribution was a great first effort, and I'm really happy that we can now start looking at responses and sharing them with departments, program directors and executive staff.

> **"** We've worked with our Advanced Support Consultant (ASC) to build out a lot of different complex reports that I wouldn't have been able to do on my own because we just don't know the platform as well as the ASCs does."
>
> — Stephen Crano, Data Management Analyst

Summary

The many ways in which Apricot benefits large organizations with diverse programming like Brooklyn Community Services include staff management, program and participant tracking, communication among staff, internal referrals, increased efficiencies, a more cohesive structure as a whole, and the list goes on and keeps growing. "Across all of BCS's 40-plus programs, we probably use every feature available in Apricot —we use every part of it. And if there's a feature that we don't use, I might get excited and figure out a way to use it," says Stephen.

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