How one nonprofit fully utilizes case management software to increase funding and improve service delivery.

INSIGHT

IN-SIGHT is a nonprofit serving the Rhode Island and border communities whose mission is to inspire confidence and build skills that help people who are visually impaired and blind to succeed and thrive. Founded in 1925, they currently serve over a thousand community members, from toddlers to elderly adults, by offering a wide variety of quality programs, including psychosocial, technology-related, independent living, and recreational services. The agency currently features a fully-equipped radio reading service, training apartment, classrooms, a low vision clinic, and a vision products store.

IN-SIGHT guides and supports people by helping them adapt to living with a visual impairment through a variety of peer support programs, low vision evaluations, assistive technology assessments and training, independent living skills training, a summer youth camp, and a radio reading service.

VERTICAL

Health and social services

VERTICAL

Health and social services

PRODUCT

Bonterra Case Management

Challenges and solutions

MULTIPLE SPREADSHEETS

Prior to upgrading their software, each IN-SIGHT staff member had their own system for tracking data. As a result, updating information sometimes required editing and reconciling data from almost two dozen Excel spreadsheets and access databases, which was time-consuming and inefficient.

With Bonterra Program Management's (formerly Social Solutions) Case Management solution, all information was centralized. IN-SIGHT's staff uses Bonterra Case Management to easily track clients, volunteers, donors, employees, and timesheets. It simplified not just updating information, but also running reports.

SCHEDULING INEFFICIENCIES AND ERRORS

Previously, staff entered appointments in a Bonterra Case Management form as well as on their Outlook calendar. In addition to doubling the work, it also often caused mistakes. To improve the process, IN-SIGHT linked Bonterra Case Management with their Outlook calendars, automating and creating a more streamlined approach to scheduling.

LACK OF SOFTWARE COMPATIBILITY FOR VISUALLY IMPAIRED STAFF

In the past, most information was on paper, preventing IN-SIGHT from employing blind or visually impaired workers, as it would require hiring another staff member to sit next to them all day and read them the files, charts, letters, and mail. But all of that changed with Bonterra Case Management. "IN-SIGHT is committed to ensuring that everything works with people with visual disabilities. The solution has always remained accessible, and that's a priority for us. The fact that Bonterra Case Management is compatible with the screen readers and voiceovers has been a huge plus for us," said Christopher Butler, executive director of IN-SIGHT.

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IMPACT OF COVID-19

Like most agencies, IN-SIGHT felt the effects of the COVID-19 pandemic, most notably in participants' changed behavior and the number of participants in their various programs. Support groups are one of the areas where IN-SIGHT has seen a decline in attendance. More than a decade ago, 195 people attended support groups, and current enrollment is considerably less. The data on the Bonterra Case Management's dashboard alerted leadership about the decline in support group participation. Christopher said, "I think that's been the nice thing about the way we've set up Bonterra Case Management – it's like a flashing red light on your car dashboard – your brake light is flashing, and you go, wait a minute, I've got to call the mechanic!" IN-SIGHT did the research, drew conclusions, and made program adjustments to improve participation in this program.

> "The way we've designed our process in Bonterra Case Management from the beginning of a new client to the end is that we've found a way to put in every single step, and then those triggers let our staff know if there is something that needs to be done, and we see a red flag – it's becoming harder and harder for things to fall through the cracks."
>
> — **Christopher Butler, Executive Director**
> IN-SIGHT

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33 HOURS
SAVED

Due to improved workflows and productivity

Impact

There are many ways in which the features of Bonterra Case Management have helped IN-SIGHT improve efficiencies, productivity, and the quality of work, all while preventing clients from falling through the cracks. Bonterra Case Management's capabilities using Dashboard, Schedule, email triggers, and caseload reports all help IN-SIGHT function most effectively.

EFFICIENCY ENABLERS

The Bonterra Case Management dashboard displays charts and graphs by department. Christopher and his staff can quickly and easily see a five-year history of the number of client intakes, participants attending training, and services offered. Briefly, they can see benchmarks, trends, and changes over a particular time period, informing decisions and planning.

Email triggers are a favorite feature of IN-SIGHT's staff. Anytime a new client is added into the Bonterra Case Management solution, an automated email triggers staff members, notifying them of a new client so that service can be provided or follow-up as a referral. Christopher identifies email triggers as organizational help to the entire staff.

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Schedule streamlines the scheduling process, making a positive difference in workflow and productivity for IN-SIGHT. For example, the data is entered only one time by staff. Schedule automatically adds the appointment to the calendar of any staff member involved and sends an email confirmation to the client. Post-training report alerts are sent to supervisors. It's estimated that this saves approximately 33 hours a year of staff time. In addition, it streamlines and tightens up the entire process, helping empower staff to be more productive and reducing opportunities for data entry mistakes.

Caseload reports are especially appreciated by frontline staff tracking individual caseloads. The caseload report form is set up to show four categories: clients waiting for training, active in training, waiting for follow-up, or completed. Once 60 days have passed, and a client is still waiting for contact or training, it prompts Christopher, or the program supervisor, to check why. Most of the time, there's a legitimate reason, but this particular feature has been extremely useful for caseload reports. The data has helped IN-SIGHT to streamline workflows and improve quality. "The way we've designed our process in the Bonterra Case Management from the beginning of a new client to the end is that we've found a way to put in every single step, and then those triggers let our staff know if there is something that needs to be done, and we see a red flag – it's becoming harder for things to fall through the cracks," added Christopher.

INNOVATIVE REPORTS

IN-SIGHT rents out assistive technology equipment, for which there is a waiting list. They have created a report on the dashboard so that when a piece of equipment is returned, it's very easy to refer to the next person on the waiting list, which streamlines and accelerates the process, helping both staff and their clients. The low vision clinic uses Bonterra Case Management forms and reports to increase their administrative efficiency. Letters sent to referring providers and information sent to the billing service are generated through the solution's forms and reports, greatly increasing efficiency.

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Client satisfaction surveys are integrated within Bonterra Case Management, and a report is generated that shows the responses, enabling them to track changes in clients' satisfaction levels. IN-SIGHT also tracks program attendance, which is displayed on the solution's dashboard, showing if goals are being met individually, as well as globally.

COMPATIBILITY WITH ACCESSIBILITY PLATFORMS EMPOWERS ALL STAFF

Th solution is compatible with accessibility platforms such as screen readers and voiceover programs. IN-SIGHT's staff members who are blind or visually impaired can use Bonterra Case Management to do the exact same things their sighted colleagues do, such as read and write case notes, complete forms, and run reports – every single part of the workflow is accessible to them.

According to Christopher, the fact that Bonterra Case Management has always prioritized being completely accessible to their blind and visually impaired employees, allowing them to be just as productive and have just as much access to information as everybody else, has made a significant difference. This, in turn, translates into confidence that IN-SIGHT's clients will be able to utilize Bonterra case management in the future with intake and other forms. "That's ultimately what we want," said Butler. "With other agencies like ours around the country, whenever this topic comes up about agencies using other software products to track data, I'm always the number one cheerleader for the Case Management solution, mostly because of this experience."

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> — **Christopher Butler ,**
> **Executive Director**
> IN-SIGHT

DATA ENABLES DECISION-MAKING TO IMPROVE SERVICE DELIVERY

Reports generated from their data help them understand information, trends, and how to improve programming. For example, IN-SIGHT analyzed monthly reports for the last five years regarding the number of intakes, low vision visits, and other activities. After asking current clients about what they would have liked to learn when they first began at IN-SIGHT, the agency created reports helping them analyze critical data. This allowed them to build into new programs exactly what clients were requesting, including training, assistive technology, skills, and support group topics. As a result, IN-SIGHT will launch an intensive, 16-hour boot camp for clients who are new to vision loss.

20% INCREASE IN FUNDING

Due to quality data showing improved impact

During the pandemic, IN-SIGHT's clients requested an open-topic, classic support group, which has continued in person for over a year. Attendance has been exceptional, as opposed to the more topicspecific community support groups attracting significantly fewer people. On the dashboard report, IN-SIGHT can view the attendance at each support group. With the obvious success of the open-topic group, they are changing their community groups to follow the same format, opening them up to family members as well.

The ability to capture and analyze data, make changes, and track the progress of those changes through the Bonterra Case Management solution is a major catalyst for improved service delivery at IN-SIGHT.

FUNDING

IN-SIGHT's annual reports are much more significant now because of the quality of data that Bonterra Case Management can provide. Because all the data is in one place, IN-SIGHT can synthesize all information into a simple, easyto- read, graphical, visual report. Board members prefer this type of information because it tells the impact story very quickly.

"Having the data has made a huge difference with grants for IN-SIGHT," said Christopher. The agency has experienced an approximate 20% increase in funding due to being able to tell a better impact story as a result of Bonterra Case Management reporting.

FUTURE PLANS AND GOALS

IN-SIGHT is using Schedule to create a new training form that will enable ease in tracking appointments and training. It has gone through extensive testing to ensure it can be used by all staff and will work well with screen readers. They plan to officially launch the new training form soon.

They also plan to use Connect, a Bonterra Case Management feature that enables participant engagement through a portal, making it easy and efficient to communicate with participants and saving administrative time. For example, through a QR code on their outreach materials, participants complete an intake form in the Connect portal, eliminating staff from taking information over the phone or writing it down at an event.

In addition, staff will use Connect to send client satisfaction surveys. Presently IN-SIGHT uses third-party platforms to collect the data, which is then input by staff into the Bonterra Case Management solution. Once they transition to Connect, participants will answer the survey directly within Connect, saving staff time by reducing data entry and eliminating the possibility of transcription errors.

Finally, IN-SIGHT plans to use Connect to enable participants to sign up for training and workshops directly in Bonterra Case Management.

Summary

IN-SIGHT uses Bonterra Case Management for everything. It helps them increase efficiencies, increase funding, improve service delivery, and support them to grow effectively and efficiently. The solution's commitment to compatibility with blind and visually impaired staff applications has solidified IN-SIGHT's confidence that it will continue to deliver the best results for their agency and their clients now and in the future.

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