



CASE STUDY

Love Inc. goes from paper to progress with Bonterra Case Management.





THE WAY IT'S ALWAYS BEEN

For 16 years, Kim Wittel, executive director, has come into the Lancaster County office of Love In the Name of Christ (Love INC) each morning set on a mission to connect people in her community with the services that they need. What does that connection look like? 35 to 40 calls a day, four staff, and a multitude of volunteers, 170+ partner churches, three unique program areas, hundreds of needs met... and a lot of spreadsheets.

That is, until Kim and her team started using the Bonterra Program Management's (formerly Social Solutions) Case Management solution to collect and report on the services they offer the community. Now, handwritten call notes, stacks of files and hours at the computer counting at the end of every month are a thing of the past. In their place is one seamless, easy-to-use tool. Less time on data and more time with clients? Now that is progress.

For many nonprofit organizations, this story may sound familiar. When Kim joined the organization in 2004, staff and resources were limited. A single staff member responsible for running the call center, Clearinghouse, recorded the daily call log by hand on a single desk calendar. Piles of handwritten notes about who called, when they called, the identified need, and the status of the need cluttered the office. The risk of losing just one sheet of paper could mean a person not fed or housed that night.

40
CALLS A DAY

170
PARTNER CHURCHES

4
STAFF MEMBERS

3
UNIQUE PROGRAMS

SHIFTING THE STATUS QUO

During the first hour of each morning, someone from the Love INC team would collect the handwritten call logs from the day before, along with corrections and updates to current records, and compile the data into a single spreadsheet.

The data would then be manipulated, and the new, updated spreadsheets would be prepared for that day.

For two to three hours at the end of each month, Kim would take the aggregated spreadsheet information and manipulate the data to provide multiple reports for their Board. When describing this process, the word Kim continuously used is counting: counting the number of calls that came in, counting the number of needs met, counting the number of referrals, and counting their impact.

Combining an hour every morning and two to three hours at the end of every month, collectively, that's 23 hours a month, or 276 hours a year.

With community needs and call volumes increasing, Kim knew there had to be a better way to collect their data. But it wasn't until Jessica Dunlevy, Love INC's ministry assistant, joined the team that she knew it was time to change. Kim considered her four-person staff and had a realization.

Three out of four of them would be retiring within the next five years. These data collection methods were working well enough for them—but would they work for the next generation of staff?

Should she invest the time and resources to train new staff in this old way of thinking, or was it finally time to take the plunge and try something new?

2,087
WORKING HOURS/YEAR

276
HOURS SPEND COUNTING

“Bonterra Case Management has been intuitive and simple enough that I have been able to put the building blocks together.”

A SYSTEM FOR CASEWORKERS, NOT PROGRAMMERS

On a mission to improve their data management processes, the team developed a clear list of what they needed: something comprehensive, with room to grow and change things over time that could link clients and data across their three programs, and most importantly, a system that was easy to use.

When Jessica joined the team, she never expected to configure a software solution entirely by herself. But when Love INC chose Bonterra Case Management Enterprise as their ideal solution, she found herself with a new role.

“I’m not a computer programmer. I’ve never done this before. But with Bonterra Case Management Enterprise, I can say, ‘If this is the outcome I want, how am I going to build the forms to ensure I get the right information?’ Bonterra Case Management Enterprise has been intuitive and simple enough that I have been able to put the building blocks together.”

WHAT DOES THAT PROCESS LOOK LIKE TODAY?

Counting, copying and pasting in spreadsheets, and stacks of paper are a thing of the past. Jessica has built a system that works for Love INC’s specific needs. As volunteers and staff answer calls in the Clearinghouse, the system is updated in real-time. Kim knows how many people are being served and the status of those services automatically, rather than waiting until the month is over. She can confidently present her Board with data to quantify the work they’re doing and identify areas of improvement. Kim can also now specify the number of needs that went unmet by using the information in Bonterra Case Management Enterprise. This data allows her to connect the dots to understand what those needs were and the reasons why they went unmet.

And those early morning counting sessions? All automated in Bonterra Case Management Enterprise. Jessica’s mornings are now spent training volunteers, helping Kim with administrative tasks, and answering calls to serve even more people in the community.

Insight from Bonterra Case Management Enterprise is helping the team form deeper connections with both volunteers and their partner churches. Kim is now able to offer partners full reports on the number of people referred and the number of needs met, specific to each church.

“ Our goal at Love INC is to mobilize local churches for outreach to their neighbors. Bonterra Case Management Enterprise is already giving us an opportunity to be both more efficient and effective in sharing with our church partners how they have made a difference in their communities, as well as the areas where there are gaps in service, giving them the information that allows them to understand where and how they can create new ministry opportunities.”

For volunteers, the team has found better ways to connect individuals to service opportunities close to home. In the past, volunteer assignments were based on proximity to their church location. Now, volunteers' information is stored in the Bonterra Case Management Enterprise system allowing the team to assign volunteers to sites closer to them. They've already found that the closer a site is to a volunteer's home address, the more likely they are to participate. With contact information organized in a single location, the team can form more direct connections with those volunteers to encourage future involvement.

There's still more work to be done. Every day, Jessica continues to build out more of their Case Management system. With the Clearinghouse recording its daily information in the system, Jessica is now looking to build out the other two core programs Love INC offers in Bonterra Case Management Enterprise. Even as a work in progress, they've come a long way from stacks of paper and individual files. With the tools in place and the data to support them, Love In the Name of Christ can be confident in their capacity to grow and serve their community.

