Driving ROI: A proven case management solution in a large human services nonprofit.

A pressing need to **develop client insights** for funder reports

CHALLENGE

A large human services nonprofit was struggling with information. They did not have detailed notes on their 30,000 clients, and it was difficult to report on or query their current data. They needed a cost-effective solution to provide a better picture of their services and clients.

SOLUTION

Bonterra Program Management (formerly Social Solutions) provided an easy-to-use system that allowed them to categorize their services and case notes and create customized reports to understand their data. The program was so successful that it has even expanded into other areas within the nonprofit.

Results

This Bonterra client with 10 field managers and 765 case managers, serving approximately 30,000 people per year achieved

$1,974,146

in annual return generated by their investment in Bonterra Program Management

476% 3-year ROI

As value was realized in two key areas:

- Streamlined data management and reporting
- Improved service delivery and funding

> "We wanted to be able to capture more detailed information. And we are a nonprofit, and the price point makes a difference - we needed a robust system at a lower cost."

Key Benefits
Large human services nonprofit

↓ **10%**

reduction in time spent on data capture

The organization was able to save $671,707 in case manager time in one year.

> "I would say we are at least 10% more efficient in data entry in the last few years, but it's probably more if you compared it to our older system from 10 years ago."

> Parts of our organization were using manual systems like google docs to ensure data was entered correctly. The standardization of data has made it a lot easier to look at program management.

↓ **20%**

reduction in time spent on data integrity

The organization was able to capture $1,343,415 in case manager productivity in the first year.

↓ **30%**

reduction in time spent on reporting

The organization was able to save $13,171 in case manager time the first year.

> "In our old system, when we tried to get an idea of how many people were served in a particular program, we would have to go office to office. Now we have all that data in one place."

> We get requests all the time from funders on how many people we are serving and their outcomes. Bonterra Program management was built to be able to track those services so that when a funder asks, we can show them all the information quickly."

↑ **1%**

protection of funding based on better performance reporting

The organization protected at least $1.92M of their funding in the first year.

Bonterra

FINAL RETURN ON INVESTMENT

This large human services nonprofit was able to save about 44 hours in productivity per user in just the first year of implementing Bonterra Program Management.

With an initial investment of $518,460, they experienced a positive return in 3.2 months and a 3-year ROI of 476%, with annual benefits exceeding $1.9M.

476%
3-year return
on investment

3.2
months to pay back
initial investment

222
additional people can
serve per year from
productivity savings

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