



## CASE STUDY

# Driving ROI

*A business case for case management solutions for nonprofit organizations*

# The business case for case management software for nonprofit organizations

Understanding and managing client data is increasingly important for nonprofit organizations. In a recent survey by HubSpot, 87% of nonprofit professionals indicated that data was moderately to extremely important to operations and decision making.<sup>1</sup> Data is not just vital for knowing where to invest funds next or what programs might need more attention; it is also how nonprofits showcase the impact their organization is making – which has become increasingly important to funders. In a 2018 Nonprofit Trends survey, 64% of nonprofits reported increased demand for transparency from donors.<sup>2</sup> Program reporting is also essential for grants or funding from government bodies – which often require very comprehensive detail around impact and results. Using case management software can help nonprofit organizations measure their performance and streamline how they house, organize, and analyze their program data.<sup>3</sup>

Hobson & Company, a leading research firm focused on return on investment (ROI) studies, worked with Bonterra Program Management (formerly Social Solutions), a leading provider of case management software for the nonprofit sector, to explore these challenges and learn how top organizations are responding. Hobson & Company conducted independent research consisting of in-depth interviews with Bonterra Program Management case Management customers and found that their solutions address specific client challenges to deliver a quick and compelling ROI.

Based on this analysis, a sample nonprofit with \$23M in annual funding, and 100 power users on the system, would see a payback in 1.4 months and an ROI of 837% with with the Bonterra Program Management solution in the first year. This research study and paper aims to highlight examples of validated use cases where the impact of a case management solution is strategic and measurable based on key metrics confirmed by current users.

# The challenge for nonprofits

Nonprofits interviewed for this study noted consistent operational and growth challenges for tracking and managing their data and services. Below is a list of some of the most universal concerns.

## **ANTIQUATED DATA MANAGEMENT PROCESSES**

Integrating and importing data from multiple systems and paper sources was a challenge cited by many of the nonprofit organizations interviewed. They expressed frustration about the time-consuming manual processes required to input data into their system and to ensure that their data was correct.

## **CHALLENGES WITH EXPANDING AND MANAGING SERVICE DELIVERY**

Attempts to manage service delivery are complicated by older systems and manual processes. When organizations would like to expand their services or create new ones, they have to develop new processes and systems to collect and store information.

## **FUNDING REQUIREMENTS TIED TO REPORTING**

Organizations are increasingly being asked to report on outcomes – both for internal analysis and external funding requests. Sometimes the data requests require weeks to collect in old systems, or because an organization does not have access to the data, they cannot seek the funds at all. Reporting to regulatory agencies consumes available resources and investment dollars, hindering the ability to focus on growth or improvements like advanced data analytics.

01. [Source](#)

02. [Source](#)

03. [Source](#)

Client research identified the benefits of Bonterra Program Management Case Management solutions across two broad business objectives:

## STREAMLINE DATA MANAGEMENT AND REPORTING

### Reduce time spent on data capture

Bonterra Program Management solutions enable staff to input relevant data efficiently and effectively in one place with advanced functionality, including required fields and data merging. Forms, workflows, and reports are included out-of-the-box and are preconfigured with best practices in mind but are easily customizable.



*We have started to create a completely paperless system with the help of Bonterra Program Management. We now have forms online, and we are capturing attendance and more, with a seamlessly connected portal.”*

—Program manager,  
Nonprofit

Customers interviewed reported:

# 35% REDUCTION

*in time spent on data capture*

### Reduce time spent on data integrity

Bonterra Program Management solutions allow organization staff to easily access and manage relevant participant information because it is so user friendly. The Bonterra Program Management Case Management solution also facilitates data management through role-based permissions and easy-to-use reporting to identify missing data or duplicates.



*We love that Bonterra Program Management meets federal FERPA and HIPAA requirements. It keeps a log of which users touch each record and when. And, Bonterra Program Management has helped us get even better with our data accuracy through exception reports.”*

—Director community engagement,  
Nonprofit

Customers interviewed reported:

**25% REDUCTION**

*in time spent on data integrity*

## Reduce time spent on reporting and analysis

Bonterra Program Management enables organizations to automatically track and easily report on specific requirements and present the data in a variety of meaningful ways. The Bonterra Program Management Case Management reporting tools allow users to create dynamic, custom reports through simple drag-and-drop report building tools.



*I can put reports together for users to be able to look at their information. If we had to produce the data with the same frequency, it would be a full-time job.”*

—Business analyst,  
Nonprofit

Customers interviewed reported:

**40% REDUCTION**

*in time spent on reporting and analysis*

# IMPROVE SERVICE DELIVERY AND FUNDING

## Reduce time spent on data capture

Bonterra Program Management solutions enable staff staff to input relevant data efficiently and effectively in one place with advanced functionality, including required fields and data merging. Forms, workflows, and reports are included out-of-the-box and are preconfigured with best practices in mind but are easily customizable.



*We have experienced both a time and quality impact to tracking service delivery.”*

—Director of community engagement,  
Nonprofit

Clients interviewed reported:

# 40% REDUCTION

*in time spent managing service delivery*

## Streamline the creation or management of new or expanded programs

Bonterra Program Management solutions enable organizations to change or configure their system to account for growing program needs and requirements. By giving the right users data access and allowing for high-level aggregation, Bonterra Program Management provides the ability to scale and quickly replicate effective models.



*Scaling and replicating programs is very easy, and we are able to almost copy and paste a program in the system in order to create a new one.”*

—Team lead, Central Texas community,  
Nonprofit

Customers interviewed reported:

# 40% DECREASE

*in cost of creating or managing new or expanded programs*



## Increase and protect funding due to better performance reporting and improved outcomes

Bonterra Program Management solutions deliver robust reporting and analytics of data that can be easily manipulated in multiple formats. The Bonterra Program Management Case Management solution enables a holistic understanding of participant status, which helps organizations make better decisions and adjust processes in order to improve outcomes.



*Previously, every time I needed a piece of data I would have to manually count. Now, I can run one report. We are able to protect a large portion of our funding because we can generate client and impact data to access opportunities."*

—Office manager,  
Nonprofit

Clients interviewed reported:

# 1% INCREASE OR PROTECTION

*of funding due to better performance reporting and improved outcomes*



## SUMMARY

A total of 6 discrete benefits were identified during the client interviews for this research paper. Based on this analysis, a sample Nonprofit with \$23M in annual funding, and 100 power users on the system, would see a payback in 1.4 months and an ROI of 837% with Bonterra Program Management solution in the first year. Below is a summary of the benefits and their potential value to a Nonprofit organization.

## MEASURABLE VALUE

### Reduce time on data input

*Through easier data entry time can be reduced by*

**35%** per year OR  
**\$547,409**

### Reduce time on data integrity

*Through exception reports and real time access, time can be reduced on data integrity by*

**25%** per year OR  
**\$391,006**

### Reduce time on reporting

*Through reporting tools and analysis, time can be reduced on reporting by*

**40%** per year OR  
**\$9,878**

### Reduce time on data input

*Through easy access to relevant participant information, time can be reduced by*

**40%** per year OR  
**\$187,683**

### Reduce time on data integrity

*Through reduced cost of creating or expanding programs save*

**40%** per year OR  
**\$1,200**

### Reduce time on reporting

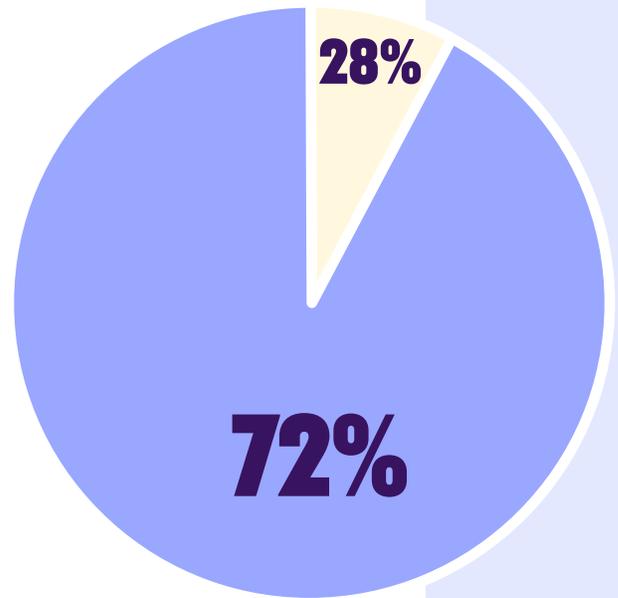
*Through better performance reporting and deliver, save*

**1%** of funding per year OR  
**\$230,000**

Based on independent interviews by Hobson & Company with Bonterra Program Management customers.

As has been demonstrated, the value of Bonterra Program Management is immediate and significant. For this sample Nonprofit Organization, an initial investment of \$72,960 generates a positive return in 1.4 months with annual benefits exceeding \$680,000 per year. The 1-year ROI is 837%.

| Financial Metric        | 1 year value |
|-------------------------|--------------|
| <i>Payback (months)</i> | 1.4          |
| <i>ROI</i>              | 837%         |



## About Hobson & Company

Hobson & Company helps technology vendors and purchasers uncover, quantify, and validate the key sources of value driving the adoption of new and emerging technologies. Our focus on robust validation has helped many technology purchasers more objectively evaluate the underlying business case of a new technology, while better understanding which vendors best deliver against the key value drivers. Our well researched, yet easy-to-use ROI and TCO tools have also helped many technology companies better position and justify their unique value proposition. For more information, please visit [www.hobsonco.com](http://www.hobsonco.com)

## About Bonterra Program Management

Bonterra Program Management provides nonprofit organizations and public sector agencies with the resources, support, and control they need to maximize impact in the communities they serve. Flexible program management solutions empower organizations to regain control of their programs – from streamlining the creation of forms and templates to simplifying data management and reporting.

**Disclaimer:** The return-on-investment (ROI) and other financial calculations expressed in this research paper are based on data provided by Bonterra Program Management clients and various assumptions and estimates only. The actual ROI realized by clients may vary from the estimates provided. Bonterra Program Management offers this research paper to assist clients with evaluating case management solutions, however, Bonterra Program Management and Hobson & Company (the firm that performed the research study and created this document) are not responsible for the accuracy of any estimates.

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