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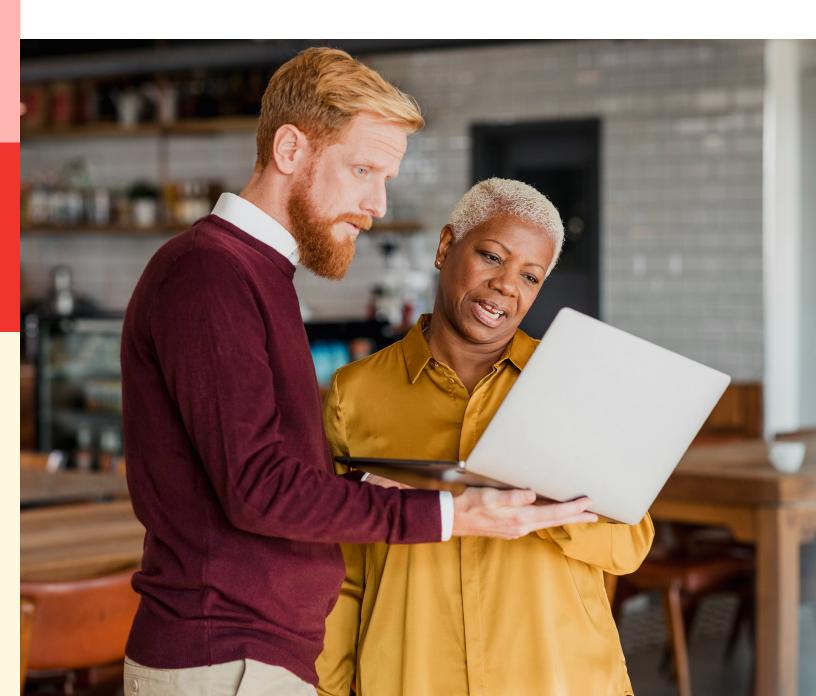
Driving ROI: A proven case management software solution in a small nonprofit

Data issues with manual processes took time away from the mission.

CHALLENGE

This small nonprofit had been using a manual system to keep track of client data. They were unable to find older or returning clients, double entering information, and often had incomplete client information. All this led to issues with service delivery.

SOLUTION

Bonterra Program Management (formerly Social Solutions) created a complete data management system that allowed them to better track their clients—including additional information to create more personalized service delivery. With advances in reporting, they were also able to secure additional funding.

> "The fact that our clients, donors, and volunteers can get all their information in one place has been huge. And, we have been able to gather more information on our clients, and that helps us in creating better programs."

RESULTS

This Bonterra Program Management customer with 3 case managers, and 1 field manager, serving approximately 1,400 people per year achieved:

$99,055

in annual return generated by their investment in Bonterra Program Management

566% 3-year ROI

As value was realized in two key areas:

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

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Key benefits for this small nonprofit:

75% reduction
in time spent on data capture.

The organization was able to save **$19,756** in case manager time in one year.

> When we were doing it the old way, we had referrals that dated two months back that we still had not been able to contact because it was taking so much time. Now our response time has gone down to two days."

50% reduction
in time spent on data integrity.

The organization was able to capture **$13,171** in field manager productivity in the first year.

> We can double-check by name, date of birth, and see whether someone is already in the system, so the information cannot be duplicated. This alone has saved us so much work."

30% reduction
in time spent on reporting.

The organization was able to save **$1,098** in case manager time the first year.

> There was no way to report anything with Google Sheets other than manually counting. It was so much work. Now I just pull the information I need into a report, and it automatically does it for me."

1% protection
of funding based on better performance and reporting.

The organization protected at least **$10,000** of their funding in the first year.

> Now I can run one report for all the information our funders want. We are able to protect—and hope to expand—our funding because we now have the information to be able to access those funding opportunities."

Final return on investment

This small nonprofit was able to save about 581 hours in productivity in just the first year implementing the Bonterra Program Management software solution. With an initial investment of $9,600, they experienced a positive return in 5.2 months and a 3-year ROI of 566%—with annual benefits exceeding $22,012.

566% return on investment after three years.

5.2 months to pay back initial investment.

4 additional people

can serve each year from productivity savings.

Find better solutions to help grow your nonprofit. Visit bonterratech.com to contact us or request a demo.