



CASE STUDY

Nonprofit organization tackling poverty leverages benefits of case management software to improve services





Have you ever witnessed a 10-year-old light up in an ear-to-ear smile when they're handed a brand-new backpack after believing they'd have to start the first day of school without one? It's a marvelous sight. And Operation Backpack is only one of the many services Phoenix Family provides.

[Phoenix Family](#) is a Midwest-based nonprofit that combats poverty by walking alongside people right where they live to help them identify what they want their life to look like and then creates a personalized plan to get there. They offer programs to more than 5,100 residents of all ages living in 34 communities in 13 cities throughout Iowa, Kansas, and Missouri.

All of Phoenix Family's programs and services are free, with an office and staff on-site within each community where residents live. This eliminates transportation barriers and allows staff to build relationships and rapport with

the residents. Strengthening that sense of community is one of Phoenix Family's goals.

Through their HIKE, Families First, and Senior Empowerment programs, they provide an integrated, broad range of services tailored to the individual person. These programs enable people to stay in their homes and with their families while they progress towards and attain self-sufficiency. In addition, Phoenix Family offers on-site activities that empower children, families, and seniors to access the essential resources they need to improve their lives and break generational poverty.

CUSTOMER

Phoenix Family

VERTICAL

Human services, supportive services, housing, children, youth, aging services

MISSION

Phoenix Family empowers people living in low-income housing communities with the on-site support they need to gain stability and achieve self-sufficiency.

Challenges

TRACKING LIMITATIONS

Before employing their current case management solution by Bonterra Program Management (formerly Social Solutions), Phoenix Family tried other databases with very limited offerings. One system inhibited the nonprofit from counting the number of individuals they served, only allowing them to count duplicate services and the number of times those duplicates were served in certain categories. While Phoenix Family eventually gained the ability to at least count the individuals served and the number of services provided to each resident, the database remained rudimentary and slowed down their process.

TIME-CONSUMING DATA EXPORTATION AND ANALYZATION

Prior to using Bonterra Program Management case management solutions, Phoenix Family had to export their limited data into various Excel spreadsheets. It helped them count individuals served, but the system caused duplication. And since their demographic data was separate, they couldn't examine and analyze resident data as a whole. This laborious process was very limiting, taking multiple hours to understand, yet the result only provided basic information.



INABILITY TO GAIN A COMPREHENSIVE PICTURE OF PROGRAMS

With an assortment of data tracking systems and their consequent inability to import demographics or view insights into how they were helping the families of their youth residents, Phoenix Family was unable to produce a comprehensive picture of their programs, particularly the HIKE Youth Program. In addition, they couldn't capture other data they wanted to see, such as social-emotional surveys, the number of parents engaging in different services, who is coming to family nights, as well as other programs and services information. With their data in Excel documents, Phoenix Family could track, but not further utilize this information. And because they lacked the capacity to upgrade their database, Phoenix Family was unable to gather the ideal information necessary for their impact story to share with the community.



Solutions

CUSTOMIZABLE SOFTWARE

One of the reasons Phoenix Family chose Bonterra Program Management case management solutions is because of its customization ability. In fact, the types of reports that Phoenix Family has built are now some of their most highly used and valuable tools. For instance, Phoenix Family's after-school HIKE Program was using an online testing resource called i-Ready in their reading labs to generate youth reading levels. It was challenging to match its data with the nonprofit's information system, taking long periods of time and not providing the actual data they needed. When Phoenix

Family learned how customizable their new case management solutions was, they knew their need to track participant changes and program data would be met. Phoenix Family built surveys for the reading labs and imported their i-Ready data directly into their new case management solutions. This new system allowed them to have all of their data in one place. As they became more familiar with how to build the reports, they were able to obtain that data much more quickly, with the critical ability to analyze it as well.

CENTRALIZED DATA

Having data in one place makes generating reports exponentially quicker. "Now it takes, in some cases, just a click," said Jessica Welch, Program Manager at Phoenix Family. One such report that habitually took multiple hours to run is now even built for several communities, comparing time periods. "Where, before," Welch adds, "I would still be counting individualization, in some Excel document for one of our sites and hope to get to it by the end of the day; Now, it all takes just a few minutes." Generating reports so much faster and more effectively also creates the ability to analyze data in real time, helping serve residents better and greatly impacting decision-making.

TIME EFFICIENCIES GAINED IN HUD COMPLIANCE

Phoenix Family stems from the [U.S. Department of Housing and Urban Development \(HUD\) Multi-Family Service Coordinator Programs](#), which involves nonprofits submitting annual reports containing file reviews, requiring annual contact with and collecting demographics on residents, making confidentiality statements, and providing releases of information and consents to release information. Several years ago, HUD changed their reporting requirements: instead of a form for each of Phoenix Family's sites with summary information, they now want an Excel form with a unique identifier for each resident over the age of 16, adding up to 66 different data points.

“Using the Vulnerability Report led to an increase in services at Phoenix Family. The data in the Impact Report was provided through new timeline comparison reports developed during the pandemic by Bonterra.”

— Jessica Welch | Program manager

Using the customization capability of Bonterra Program Management case management solutions, Phoenix Family created a report that is identical to the required HUD Excel form. The report is uploaded directly into HUD's grant solution system, making it a simple and efficient process. This compliance report reflects the last time a resident had a touch point and when the next is due and clearly lays out which residents need to be visited in the upcoming month.

Prior to using Bonterra Program Management, the number of spreadsheets necessary and the hours it would take to go through them was extremely tedious and inefficient. If it weren't for their current ability to report HUD information, "I don't know what we would have done," said Jessica. "I would have had to hire another person just to sift through Excel documents to be able to gather the data because I wouldn't have been able to keep up with the demand."

MORE EFFICIENT HUD REPORTING

Customized reporting enabled Phoenix Family to create a report identical to HUD requirements, making HUD reporting simple and efficient.



Impact

TYPES OF REPORTING

During the pandemic, when in-person visits to residents were canceled or extremely limited, Phoenix Family realized the need to focus on their most vulnerable residents. So they built a report for residents in their senior communities and those with disabilities based upon a daily living assessment of activities that showed how many areas a resident could need help managing.

This data looked at residents' age, their self-reported conditions, and past trends of those in need of the food pantry or transportation. They developed a point system around each resident so they could run a report and see, with the click of a button, who were the most vulnerable based on these categories and how many crises they had experienced in the last year.

This Vulnerability Report helped Phoenix Family understand that residents with a higher vulnerability score needed more frequent visits.

The data also enabled them to decide how many times a resident should be visited and ascertain what changes to make and how to make them.

Interpretations and actions made as a result of the Vulnerability Report kept residents from falling through the cracks. It helped avoid decreases in quality of life, from preventing loss of housing or an inability to pay utilities to not having enough food for their families or even having a mental health crisis without anyone's knowledge. In some cases, life-saving services were provided for residents as a result of the report's findings.

The insights gained from the report helped identify kids who were at risk of falling behind in school, who might not have been able to stay connected with their teachers, or who had not

enrolled or attended school. As a result, Phoenix Family made several changes to their HIKE program to meet children's needs during shelter-in-place. For example, while kids were in school and without a place to go for internet service, they came to Phoenix Family's program areas, where they offered enhanced internet service to connect children to their schools until the school systems could provide hot spots. Phoenix Family also changed their program offerings for children, adjusting from after-school labs to learning labs, with reading labs following.

Their Bonterra Program Management case management solutions helped in all of these efforts, both in knowing how to go about organizing information to achieve these goals, as well as knowing how many children they needed to serve.

PREDICTING FUTURE NEEDS

Phoenix Family's use of Bonterra Program Management case management and reporting capabilities allowed them to stay ahead of crises by predicting future needs and helping their community prepare. In one report, Phoenix Family showcased the value they provided by being in the community with their seniors. The report highlighted the reasons why a resident moved to a higher care facility, along with how many years, on average, the resident lived in the community with Phoenix Family's support. Higher numbers reflected that Phoenix Family was helping people live longer, where they chose to, which was less turnover for the owners of the senior's residences. It demonstrated that the nonprofit supported seniors' needs and those in crisis as they aged.

Report data combined with anecdotal stories from on-site staff observations provided details to understand trends and inform future plans to meet specific needs. For example, data revealed pantry usage increased by 100% between May and June 2022 in their senior communities alone. This trend indicated a likely increase in demand for rental and utility assistance. With this information, they were able to plan accordingly.

During the shutdown in 2020, seniors lost a lot of social interaction and supportive services. Additionally, some residents did not have access to friends or family, so Phoenix Family staff were the only contacts they had.

The tracking from the Vulnerability Report data during this time reflected that Phoenix Family had a huge increase in the number of wellness checks and mental health needs, which helped them learn and understand crisis trends to better plan ahead for the future.

IMPROVE COMPETITIVE ADVANTAGE FOR GRANTS AND FUNDING

Phoenix Family is unique in that they serve each family in a holistic way and look at the stability of the whole family. For instance, through one program, they help kids with their reading, while through another, they help the parents make sure they can pay their rent. “In this way, Phoenix Family knows what’s going on with the child, such as if they are struggling or having behavior changes, or they haven’t been able to focus on school because their mom is under stress,” explains Jessica. Through the data, Phoenix Family can report critical, holistic information, like, over the last year, how many youth or families were in crisis and who received emergency assistance. They can also report who is still living in their communities after six months, keeping children from having to move to another community

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and start school at a different location, which can cause poor educational outcomes. The ability to report data across programs helps Phoenix Family better serve their residents and have a competitive edge with grant funding.

Case management solutions, like Bonterra Program Management, allows them to use data and tell their impact story to potential donors. Phoenix Family pulls aggregate data across demographics and programs, enabling them to see multi-layers and multi-programs, showing changes and increased needs. As a result, they are more competitive where grant funding is concerned.



PREDICTING LEASE VIOLATIONS

The Bonterra Program Management solution enables Phoenix Family to predict lease violations and help reduce evictions. It tracks how many lease violations a resident may have, if there is a plan in place to remedy the situation, and if the resident follows through. If the lease violation does turn into an eviction, Phoenix Family can see this data and further help residents avoid this situation in the future.

SERVICE DELIVERY IMPROVEMENT

For their back-to-school events, Bonterra Program Management case management solutions allows them to manage Operation Backpack data, such as how many kids are in each community, what grades they are in, and how many backpacks can be collected. This information helps them provide new backpacks to youth residents in need.

By analyzing report data, Phoenix Family found that they were doing a good job of intervening in crises, increasing the number of residents receiving rental and utility assistance, and addressing mental health needs on-site. They saw an opportunity for a new program that would help residents leave poverty. Therefore, Phoenix Family launched a new program component in which a life coach works with residents to help identify and meet goals that, in steps along the way, empower them to escape poverty. This bridge to self-sufficiency is reflected in data through a point system based on how stable a household is, increases in income over time, and similar information. Phoenix Family measures this progress by analyzing reports through Bonterra Program Management case management.

13,561
SERVICES
OFFERED

An increase during seven months time.

26-561% INCREASE IN SERVICES OFFERED

The Vulnerability Report identifies ten needs which led to service increases for Seniors.

STAFF RETENTION

For many nonprofits, employee retention and burnout can be a major challenge, leaving connection gaps between staff and residents. However, in order to establish relationships in building community, creating stability is essential, and it starts with trust. Effective data shows staff members the positive impact they make and can not only be a great morale boost but can be a reason for celebration! Staff retention reinforces relationship building and trust and is a large part of your organization's success.

Every three to six months, Phoenix Family provides staff with graphs of changes and percentage increases in the residents' needs, from rental assistance to mental health crises. Putting those individual interactions into a larger picture is validating to staff, helping them understand just how many residents they've helped, how many times, and what the ultimate impact has been. This simple routine process helps contextualize the work overtime for staff, as well as increase employee retention. It is a great example of how Phoenix Family uses Bonterra Program Management to not only share its impact with grantmakers and donors, but with their own staff.

FUTURE PLANS

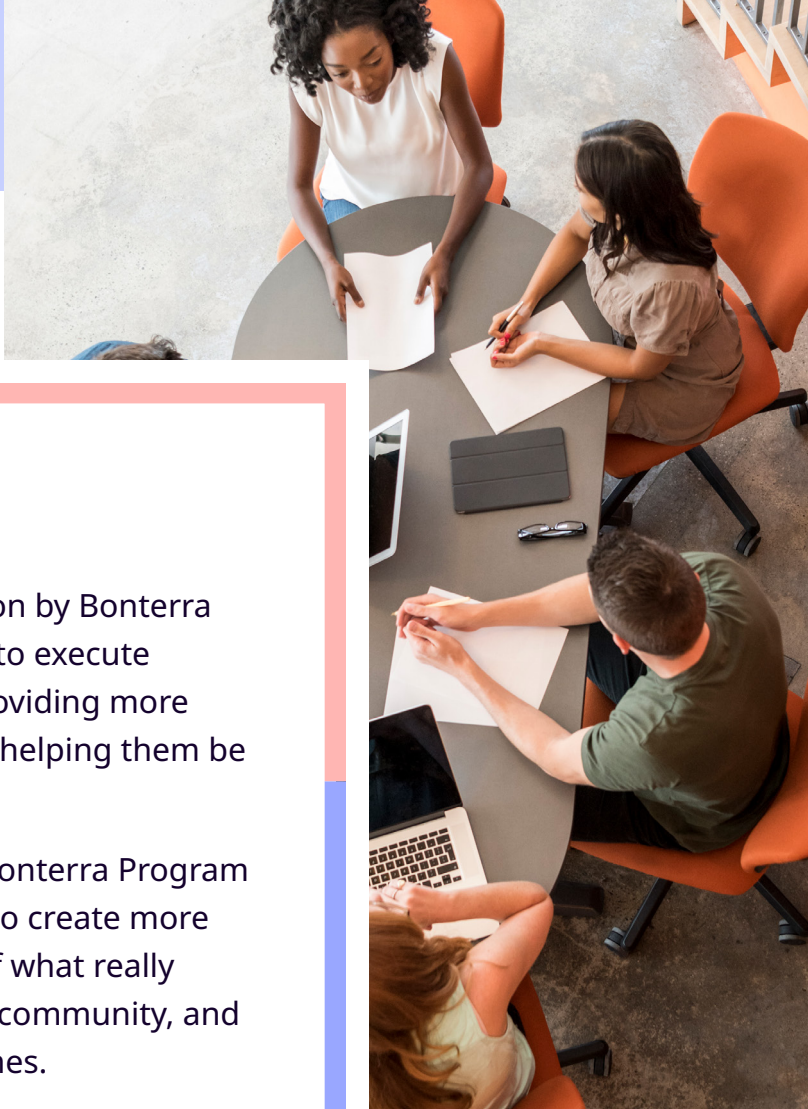
Phoenix Family aims to track and demonstrate the outcomes of people moving out of poverty. One way they will do this is through their new Life Coach Program component by identifying residents who would be a good fit for coaching and contacting them to enroll.

Additionally, with the bridges of self-sufficiency, Phoenix Family can track a resident's progress as they leave poverty and become self-sufficient. This will allow the nonprofit to track residents' actions, such as how many goals a resident set, how many they meet, and on average, how much income has increased for residents who met these goals. This data will help Phoenix Family see specific trends, where they were successful or could improve, and then adapt to enhance outcomes.

48 TIMES FASTER REPORT GENERATION

Enabled by case management software.





Summary

Phoenix Family's case management solution by Bonterra Program Management has made it easier to execute administrative tasks, saving them time, providing more information to better serve residents, and helping them be more competitive in seeking funding.

Phoenix Family successfully utilizes their Bonterra Program Management case management solution to create more ease for staff, allowing them to do more of what really matters—serving their residents, building community, and improving services, programs, and outcomes.

READY TO CREATE LASTING SOCIAL CHANGE? GET IN TOUCH TODAY.

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