



CASE STUDY

Volunteers of America Southeast *Mobile, Alabama*





[Volunteers of America Southeast \(VOASE\)](#) has been serving communities across Mississippi, Alabama, and Georgia for four decades. In addition to providing programs for intellectual and developmental disabilities, the organization also serves veterans, low-income seniors, children and youth, individuals experiencing homelessness, and people with addictive diseases and mental illness. After receiving funding to expand their Supportive Services for Veteran Families (SSVF) program into Alabama, VOASE began searching for a cloud-based client management system to replace their reliance on paper files and spreadsheets.

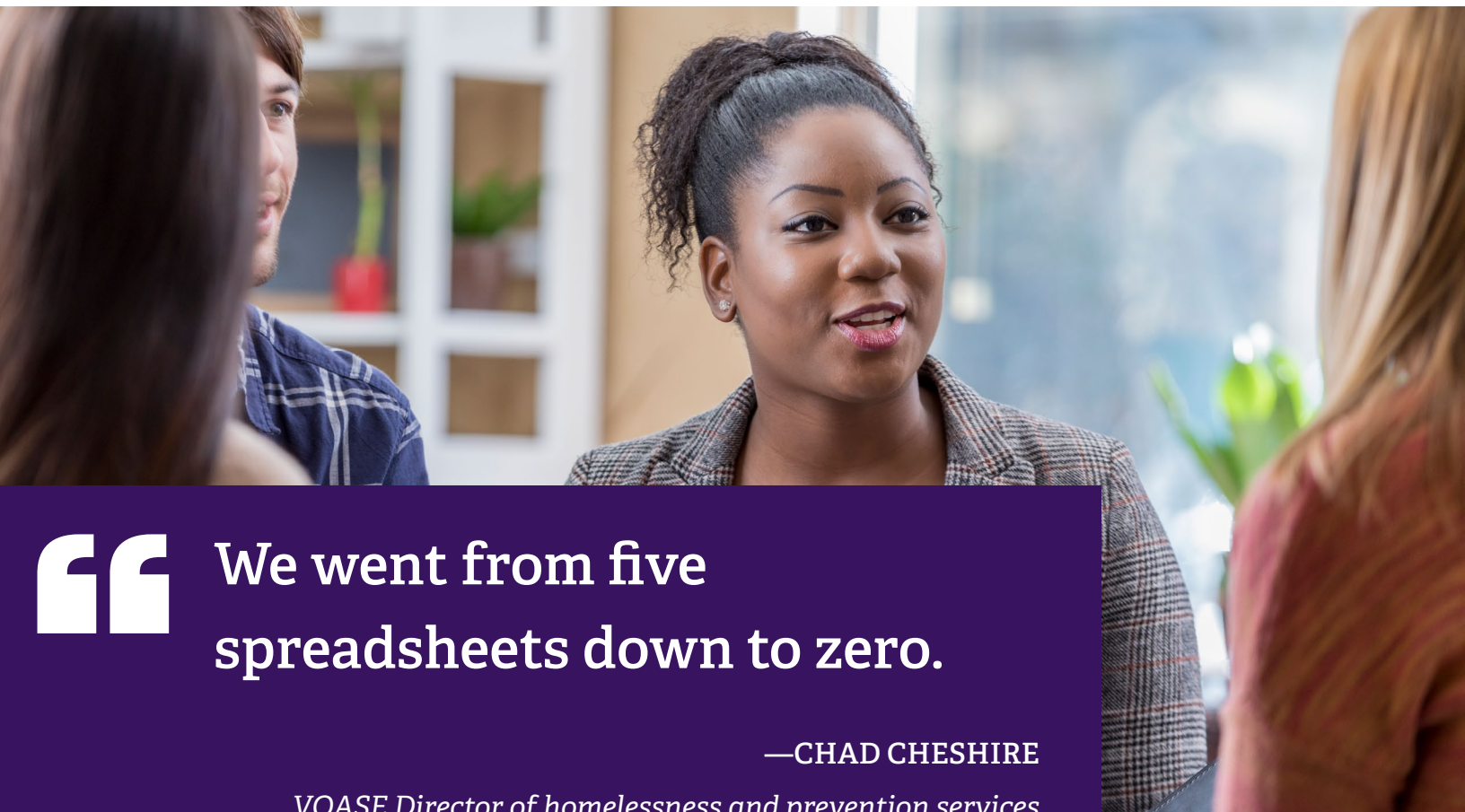
- ▶ **Cut intake time in half**
- ▶ **Reduced reporting time from all day to 15 minutes**
- ▶ **No longer use spreadsheets for data tracking**

Improving efficiency and sustainability with Bonterra Program Management

In 2019, VOASE selected Bonterra Program Management's (formerly Social Solutions) Case Management solution to help reduce their paper usage and provide them with a better way to track client files in a configurable database that could also automate key workflows and processes.

As Chad Cheshire, VOASE's director of homelessness and prevention services explains, Bonterra Program Management was chosen for its flexibility and configurability and the ability for VOASE to assume ownership of a scalable system that could manage the administrative side of operations. In addition, being able to customize forms to meet shifting funder requirements was also a must-have.

"We wanted to be able to adapt to that as needed and really have the ability for the system to do what we need it to do," he said.



We went from five spreadsheets down to zero.

—CHAD CHESHIRE

VOASE Director of homelessness and prevention services

Saving time with workflow automation

Perhaps most important of all for VOASE's work was being able to use a system with configurable workflow automation, task management, and time-based action triggers.

VOASE now uses Bonterra Program Management's Case Management solution to automate previously manual processes such as coordinating new client intakes and case manager assignments across multiple locations, check requests, exit workflows and paperwork, and issuing important reminders for 90- day recertifications.

Setting up automated workflows and action triggers means investing time during the implementation phase. Still, the return on that investment is high, said Cheshire, as it allows staff to focus on their work while the necessary flow of information occurs automatically in the background.

"Once you get them built, the system works on its own moving forward," he said.



Easier intake and reporting

Prior to using Bonterra Case Management, VOASE used a spreadsheet to track time from the first contact with a client to their enrollment in service. Now, however, their system does that work via the Pre-Enrollment/Waitlist functionality, which provides greater visibility into who's waiting and why, as well as built-in reports that show the average number of days from first contact to program enrollment across a given program or the whole organization.

“Our intake time was cut dramatically,” said Cheshire, adding that, previously, the time from intake to enrollment was averaging around six or seven days. “Now, because of Bonterra Case Management, it streamlines the process and the time to do an enrollment is cut probably in half, but also the number of days it takes to enroll someone into the program is cut.”

Bonterra Program Management is also now tracking all of VOASE's outreach programs, referrals and meetings. “We went from five spreadsheets down to zero,” said Cheshire.

Bonterra Program Management has also freed up time to allow the organization to apply for and secure new grants for other programs.

For example, pulling demographic and outcomes data from the system and its Tableau add-on module to apply for and secure grants took around “15 minutes,” Cheshire said, adding that it's also proved a time-saver when compiling reports for the board.

“It used to take a day to find all that data in the spreadsheets and compile the report to send to my senior leadership, and now I can just run two reports in my system, and there's my data,” he said.



Using technology to navigate COVID

Bonterra Program Management has also provided cost savings during COVID, as staff is able to work remotely, and the organization can use electronic signature functionality to eliminate costly traveling between locations to obtain signatures.

“Bonterra Program Management offers add-ons that allow you to send forms to clients for signatures, and they can send it back, and it’s all done through the system,” he said. “The ability to do that work in the system itself so we can stay in compliance with the VA is a great benefit.”

Changing from paper to an electronic system can be a tricky exercise in change management, but once the initial setup and implementation of the system was complete, Cheshire said his staff has bought in completely.

“Every single one of my staff has admitted that this is the way to go,” he said. “It’s better than what we were doing, and it makes their jobs so much easier.”



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