



## CASE STUDY

For the Communities of Rooted Brilliance, building strong programs means opening the feedback loops.



# Bonterra Program Management's (formerly Social Solutions) Case Management solution helped reveal and address the broad needs of refugee and immigrant families in King County, WA.

Imagine resettling your family halfway around the world and settling in a foreign land. Now, you're not only faced with establishing a home, but you're also facing a language barrier and multiple urgent needs.

For the Communities of Rooted Brilliance (CRB), the mission is clear. CRB builds relationships with and supports immigrant and refugee families through education, social support, and advocacy programs. The CRB aids refugees and immigrants who have settled in the greater Seattle area by serving as a safe community resource. They also help refugees become advocates in their communities and provide culturally and linguistically appropriate social support services to improve their living conditions and quality of life.

CRB has been offering programs that address gaps in service since 2010. These programs provide critical support to families where, when, and how they need it. The organization also provides referrals for additional support when needed. Case management software helps them stay organized and focused on the goals set in partnership with the communities served while helping CRB systematically take the necessary steps to move their work forward. In addition, case management software assists in gaining insights into qualitative data so they can provide support programs that truly make an impact.

## CUSTOMER

Communities of Rooted Brilliance

## SECTOR

Immigrant and refugee services, community development

## PRODUCT

Bonterra Case Management Enterprise

# Challenges

Still, in its early stages, the CRB learned of their community's needs and the best way to help them – through close relationships with community leaders, who provided the guidance and insight needed to create relevant programs. Based on that feedback, CRB has designed and implemented an array of different programming to address community needs over time; initially, ESL classes were a focus, specifically for those newcomers who had not learned to read or write in their own language. Over time, and as a result of their bond with the community and their commitment to respond to current needs, CRB has implemented family literacy, early learning, youth engagement, digital literacy and case management programs. In the wake of the pandemic, families in the early learning program began to lean on CRB to support their basic needs including help with rent, access to food, and the demand for additional early childhood services such as daycare and preschool placement.

**20 HOURS  
PER WEEK IN SAVED  
STAFF TIME.**

“Bonterra Case Management has completely revolutionized the way our entire team works together. It's so important that we are constantly communicating and sharing feedback, especially during the pandemic. The integrated dashboards have kept us organized and focused.”

— Kirsten Gabele | Early learning program manager, CRB

## CASE MANAGEMENT REQUIRES SHARING DATA FROM MULTIPLE SOURCES

Every refugee and immigrant family comes with a unique set of needs as they become integrated into the community. In their Early Learning program, for example, CRB conducts home visits with each family to learn more about them and their needs as well as deliver program content on healthy child development, school readiness and parent advocacy. But the sheer volume of data in case files was overwhelming. Home visitors filled out intake forms by hand and wrote their notes, capturing conversations that unearthed unique cultural needs and customs to inform how they worked with families. CRB needed a seamless dashboard that staff, home visitors, and families could use to share real-time feedback, with no services lost. Plus, they needed to follow the progress of the home visiting staff to make sure they had all the support they needed to manage a family's case successfully.

## GETTING THE FULL STORY ON A PARTICIPANT'S EXPERIENCE IS HARD

Working with refugee and immigrant families as they transition to life in the U.S. comes with challenges, including cultural and linguistic barriers. CRB could track quantitative and qualitative data, like the number of people served and anecdotal experiences. But they were having a hard time making sense of the qualitative data they needed to help focus their programs. Some clients, for example, did not feel confident in their understanding of U.S. institutions, like school systems. This was information that CRB needed to strategize new ways of delivering program content.

## PROVIDING HOME VISITING SERVICES DURING A PANDEMIC IS PROBLEMATIC

How does a home visiting program function during a pandemic? Like many groups, they had to improvise. The CRB needed a simple yet comprehensive tool to connect families, home visitors, and staff with no interruption in services, as well as a way to understand if program fidelity was being kept. Capturing program details manually just wouldn't work. CRB needed a better way to track program activities, outcomes and feedback, all while working from home.

“Bonterra Case Management has completely revolutionized the way we work and how we get feedback on our work.”

— Kirsten Gabele | Early learning program manager CRB

**100%**  
MOVED FROM PAPER FORMS TO DIGITAL INTAKE, ASSESSMENTS, AND SURVEYS.



# Solutions

CRB began to work with The Capacity Collective, an organization that provides data capacity building and technical assistance to community-based organizations. In partnership, they began to provide a way for administration, home visitors, and families to easily track, review and share data.

With the adoption of Bonterra Case Management, CRB has taken data collection and analysis to the next level. As a result, CRB can confidently tell a story using data that puts the community at the center, demonstrating its positive impact using Bonterra Program Management's powerful technology platform.

## THE CRB, IN PARTNERSHIP WITH THE CAPACITY COLLECTIVE AND BONTERRA PROGRAM MANAGEMENT, HAS BEEN ABLE TO:

- **Track** family and staff data, case information and planning, and delivery in one place
- **Create** surveys in six different languages to gather honest and de-identified data, which enables CRB to serve families in culturally and linguistically appropriate ways, in a timely manner.
- **Customize** configurable dashboards to gain end-to-end views into meaningful data and stay in control
- **Collect and share qualitative insights** from surveys
- **Report** critical outcomes that they can edit as needed for both internal and external stakeholders, as well as other community based organizations
- **Measure** outcome achievements and manage outcomes at the same time
- **Automate workflows** that make sense in an interface the team, home visitors/community leaders, and families could learn quickly on desktop and mobile devices
- **Save time** on data entry, data integrity, and reporting

**100%**  
**OF THE HOME VISITING STAFF AND THE EARLY LEARNING TEAM HAS EMBRACED TECHNOLOGY AND THE POWER OF ELECTRONIC DATA COLLECTION.**

“Working with Bonterra Case Management has enabled us to strategize on a level that was not possible before. Even our home visitors use this software as part of their professional development. They're more technology-savvy and able to share important data with the team in real-time instead of filling out paper forms. That's a gamechanger.”

— Kirsten Gabele | Early learning program manager, CRB

# Impact

Adopting Bonterra Program Management's solution has made it faster and easier to share data from multiple sources, uncover new ways to effectively interact with families, and provide invaluable professional development opportunities.

Having a robust data management tool to track family contacts across time is also beneficial. Once the participant is registered, they are officially part of the program, and information can easily be shared among various groups providing services. With Bonterra Program Management, CRB's ability to launch this aspect of the program happened more quickly and effectively than they had initially planned. As a result, they can now focus the majority of their time and energy on program delivery and supporting families.

With real-time data sharing supported by email and text alerts, home visitors can effortlessly interact with CRB staff to ensure all relevant data has been gathered. And home visitors can keep administrators regularly in the loop regarding feedback from families and new ideas. So, quality checks are consistently happening as interactions with families continue. In other words, as constant needs assessments happen, adjustments can be made at any time.

An additional upside that CRB didn't anticipate but enthusiastically welcomed was increased digital literacy among families and home visiting staff. These new smartphone and dashboard skills have served as an ad hoc technology course that expands skill sets and empowers lives.

In being able to thoughtfully and meticulously track and share a family's progress, the CRB is now hoping to gain even more knowledge about how to best serve refugee and immigrant families. This is knowledge they plan to share with other community-based

“We're very interested in qualitative data like focus groups and one-on-one conversations so we can understand the whole story of a family. Now we have this very powerful tool in Bonterra Program Management that helps us gather this information. This case management tool is so much more than just data gathering. It's about people.”

— Kirsten Gabele | Early learning program manager, CRB

**BONTERRA CASE  
MANAGEMENT ENABLED  
THE ABILITY TO GATHER  
PARENT FEEDBACK IN SIX  
DIFFERENT LANGUAGES**