

CASE STUDY

Optimizing investment
and resources leads to
exponential growth.



West Houston Assistance Ministries (WHAM)

is a nonprofit organization that provides social services to the needy and families in crisis without regard to race, religion, gender, national origin or disability. WHAM intends to be a model of Christian service in the world. WHAM offers programs that meet the immediate basic needs of those in their community, such as rental, utility and food assistance. They also provide coaching and training through adult literacy and education programs to promote independence and equip a person to achieve long-term stability. Through WHAM's Care Ministry and Job Readiness Programs and the Resale Shop and Food Pantry, the largest in West Houston, their staff and volunteers serve the West Houston community with care and compassion.

CLIENT

West Houston
Assistance Ministries

VERTICAL

Health and Social Services,
Family Self-Sufficiency

PRODUCT

Case Management Enterprise



CHALLENGES

Initial challenges with data accuracy

Before onboarding Bonterra Program Management's (formerly Social Solutions) Case Management Enterprise solution WHAM used a custom-made database, which was not cloud-based and made it difficult to capture their data efficiently. Acknowledging this solution no longer worked for them, their leadership committed to fully aligning their operational value goals to be data-driven and reflect excellence in all they do. In doing so, they realized they required a greater ability to obtain data accuracy and integrity. This is essential in accurately telling their impact story and establishing trust and confidence with funders. **"Reporting accuracy is the highest priority, so funders have confidence in what we can do,"** stated Lisa Iparrea, director of client services. Moreover, due to data integrity challenges with inconsistencies and inaccuracies, they faced the issue of time inefficiencies related to reporting.

Systems to support growth

With the onset of COVID-19, WHAM experienced major growth with the increased number of people seeking help. They were challenged by day-to-day and day to-week demands and seeing past the short-term time frames. All of this highlighted the need for a case management solution that would provide sophisticated data to inform future planning as well as establish systems to support this growth.

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West Houston Assistance Ministries is the largest food pantry on the west side of Houston. Last month, with Bonterra Case Management's help, we were able to identify helping 7,001 people, and we're just getting bigger and bigger.

LISA IPARREA
Director of client services



The need of leverage software

With increased demand for WHAM's services, staff needed to serve the people directly, minimizing time devoted to administrative tasks. Management analyzed options and saw the best use of their resources was to invest in the Advanced Support Consulting and Managed Services packages with their Bonterra Case Management investment. This decision eliminated the need to spend time finding, hiring and training a new member of staff to provide platform subject matter expertise. Engaging their dedicated support resources and leveraging the Advanced Support Services and Managed Services to take Case Management further has allowed WHAM to quantify an unprecedented growth in services and protect against data lost with staff turnover.

SOLUTIONS

The decision was made to tap into the expertise at Bonterra Program Management and invest in both an Advanced Support Consultant (ASC), a dedicated, subject-matter expert who provides client-led, one-on-one help and a Managed Services Representative, a dedicated, subject-matter expert that works as if they are a member of your organization's team and provides proactive maintenance and administration. Both investments allowed WHAM to save time and money while helping their administration team learn and take their use of Case Management even further.

3X GROWTH
in participants served

Tailor-made solutions

Data integrity problems created by duplicate contact records are a common challenge for many organizations. Bonterra Case Management is designed to help detect duplicates and eliminate dual data entry. WHAM's Advanced Support Consultant assisted them in identifying all the different ways a duplicate contact record could occur and helped them set up Case Management to readily detect any duplicate entries. In addition, the customization and flexibility of Case Management enabled WHAM to withstand these "tests" of the system, offering data solutions that feels tailored to their organization.



Managed Services helps us see what we didn't see before. It gives us the opportunity to think about how we can make improvements by providing us with suggestions while going through reports. That's what got our wheels turning on how we can do better. For me, that was golden.

MARIA HOSPEDALES
Database coordinator

Pulse on the future

Another step to refine data accuracy was improving the forms that WHAM's staff used with participants. Again, WHAM worked together with their ASC to identify what successful and accurate data looked like in their specific situation, improving and reconfiguring the form logic. This insured WHAM's confidence that the new form configuration could meet their needs while reflecting accurate data. Part of Managed Services is performance and quality testing, which validates user experience at all levels, impacting the use and accurate data entry within Bonterra Case Management. Because the platform is customized, the testing is tailor-made to meet their needs. Maria Hospedales, database coordinator for WHAM, said with a smile, "The more I started working with the form logic, I started to understand what every step meant. Then [our Managed Services expert] would come in and say, 'Okay, I'm going to try to break your form.' Now when he tells me that, I'm like, 'Go for it'". Not only is their data more accurate because of form improvement, but staff expertise and knowledge have also developed.

Moreover, having good data has refined their decision making, showing them which programs need more resources. In terms of future usage, WHAM aims to reach 12,000 participants and families served, and they are evolving their workflow and use of Case Management to accommodate the increased data entry needs of their staff.



IMPACT

Identifying opportunities

The expertise brought by their Managed Services professional has helped WHAM identify areas of opportunity and improvement, whether gaining efficiencies or enabling growth and information for decision making. As for the services they're providing, **"It's helped us as far as seeing what we didn't see,"** said Hospedales. Managed Services has also greatly influenced their current and future funder confidence. Lisa Iparrea adds that major funders, having seen WHAM's development and the improvement in their manner of service collection both pre- Case Management and after, have been **"very impressed by the way we conduct our database process."**



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Our Advanced Support Consultant has brought so much relief to us. It is incredibly valuable to us, and it's absolutely 1000% worth it because they know what they're doing. Managed Services brings a different perspective to what we don't always think about as a nonprofit. It's a proactive approach, and that's so helpful because it helps us keep our eye on the future and pull advanced reports with the least amount of discrepancies as possible and keeps us on task.

LISA IPARREA
Director of client services

Data accuracy

WHAM's Managed Services expert has helped them hone their data accuracy, paving the way for advancement. This has positively influenced every aspect of their operations, from increasing funder confidence to improving their community relationships and reputation. Furthermore, it's proved extremely effective in their reporting for 990s, noted Iparrea.

Leveraging investment

Managed Services and Advanced Support Consulting experts leveraged WHAM's budget to help them get the absolute best and most out of Bonterra Case Management. Ultimately, this was a less expensive way than finding, hiring and retaining a Case Management expert in-house. Moreover, it reduced any risk related to staff turnover, giving them peace of mind that no matter what, they would have all the notes and logs of the work done by their ASC and Managed Services experts. Plus, they knew they would always have someone there to support them.

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Our Managed Service Representative works closely with Maria, our database coordinator. She's able to identify problems and create solutions with our representative. It empowers her as an employee, and I love that as a director. Maria has excelled with having her ASC and Managed Services consultants by her side.

LISA IPARREA
Director of client services





14X INCREASE
in people served through food pantry

Staff development

ASC provided 1:1 consulting, empowering staff to grow in their roles, allowing them to learn effectively and gain confidence. In addition, WHAM's staff has developed an innovative application of what they've learned from working with Managed Services and ASC experts. One of WHAM's biggest goals in terms of the ASC services was that, when it came to their platform, the experts would simultaneously "fish for them" and "teach them how to fish." **"[Our staff] is able to work out and identify problems and create solutions with our ASC, so it's really empowering them as employees. I love that as a director,"** said Iparrea.

Organizational development

The onset of COVID-19 required WHAM to go virtual. Case Management enabled staff to do their work from anywhere because it is cloud-based, which was and continues to be essential. Moreover, being available virtually brought about exponential growth for their organization to an increase of 14 times the number of people served in the West Houston community.

SUMMARY

West Houston Assistance Ministries has successfully leveraged their investment in Bonterra Case Management by utilizing the Advanced Support Consulting and Managed Services: Basic System Administrator programs, helping them fully maximize the benefits of using a case management solution. It's enabled exponential growth with greater ease in less than a year of usage, improved services and increased funding. The Advanced Support services have helped WHAM leverage all of their resources, whether it be staff time or investment in technology. By using ASC and Managed Services, WHAM is empowering their staff to develop professionally and become experts in using data, which enables innovation that will support growth in exciting new ways to be discovered.



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