



CASE STUDY

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Kids & Families Together (K&FT) is a nonprofit support, education and counseling resource center in Ventura County that provides services for foster, kinship, adoptive and birth parents, and children in the child welfare system, for the preservation of families and the physical, emotional and mental health of children.

Their mission is to strengthen relationships by providing safe, supportive help that keeps family members emotionally connected to one another. K&FT helps parents and caregivers by offering specialized education and support to enhance their ability to raise safe and healthy children.

As a contractor for the county government, K&FT offers four different types of programs: programs for caregivers (foster/resource, kinship, adoptive and legal guardians), programs for children/youth (in the child welfare system), programs for birth parents (in the child welfare system), and programs for the community.

PROGRAMS FOR CAREGIVERS

Kids & Families Together offers a variety of subprograms for caregivers, which include Strengthening Adoptive Families Through Education (SAFE), Support & Education and Training (SET), Guardian Stabilization Program (GSP), Peer Partner and Educator Program (PPE), and Pre-Service Training (PST). Therapy, education, and training, often in-home, are offered to support caregivers and guardians.

An additional program offered for caregivers is the CSEC (Commercial Sexual Exploitation of Children) Family Empowerment Program, an in-home therapeutic support and psychoeducation program for parents/caregivers with a child identified as a CSEC victim or at high risk of being exploited.better.

PROGRAMS FOR CHILDREN/YOUTH (IN THE CHILD WELFARE SYSTEM)

The Early and Periodic Screening, Diagnostic, and Treatment (EPSDT) and 0-5 Assessment Program/Short Term Service (STS) programs provide support for kids in the child welfare system. Here youth are offered emotional and mental health support as well as assistance to older adopted youth and adults adopted from Ventura County Dependency Court wanting to search for birth families.

PROGRAMS FOR BIRTH PARENTS (IN THE CHILD WELFARE SYSTEM)

In the Therapeutic Family Support Services (TFSS), Parent Advocate Services (PAS) and Parent Education and Support (PES) programs, birth parents can find resources for strengthening the parent-child relationship. With some services offered in-home, clients will find the guidance, mentoring, and support they need to help heal past trauma and have a healthy relationship with their child.

PROGRAMS FOR THE COMMUNITY

Here, Community Counseling offers individual, child, or family therapy, as well as parenting support and education that helps parents and caregivers understand the best way to help their children.

Challenges

LABORIOUS REPORTING PROCESSES

Without a centralized database, reporting was extremely timeconsuming and arduous. Garcia explained that because all the information was in separate places, pulling reports “would take hours or multiple days,” depending on staff availability, which also took valuable time away from their mission and community. Pre-Case Management quarterly reports

were cumbersome, tedious, could take a week to complete and “were a bit of a nightmare,” says Amy Huot, Outreach Manager who leads donations, giving, events and fundraising.



“ Bonterra Case Management has helped greatly with collaboration and the ability to provide better care to the families we serve.”

- Amy Huot, Outreach Manager

PROGRAM REVIEW INEFFICIENCIES

Kids & Families Together is an organization with multiple programs and layers of sub-programs. In almost all of K&FT’s programs, providers entered their case notes into a Word document and then submitted them at the end of the month. If there was an issue that a manager wanted to discuss, it proved inefficient and difficult to remain up-to-date on something that could have happened four weeks ago.

In addition, K&FT staff and managers were still involved in the tedious and time-consuming process of using Excel and Access. Consequently, when information needed to be shared among themselves or with outside sources, these programs within the organization often became siloed. These challenges presented the clear need for one centralized, customizable database.



LIMITED INFORMATION FOR REPORTS

The lack of data filtration presented challenges in K&FT's reporting process due to limited, detailed information that leadership desired, such as reporting on demographics. In addition, many clients participate in multiple programs. Without a centralized database, duplicates and double counting presented an ongoing challenge to producing accurate reports, and it was vital to create accurate reports when applying for future grant opportunities.

Reporting 5-10 times faster

Preparing clinical program reports used to take a week. Now it takes just one hour.

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ADOPTION CHALLENGES BY A MID-SIZED NONPROFIT

“We’re a mid-sized agency, 60+ in staff, so being a smaller nonprofit, we all wear a bunch of different hats,” says Karina Garcia, Program Manager. Garcia also works on requests for proposals from the county, heads a team of five staff that work with clients, leads an administrative staff, and now helps administrate Bonterra Case Management. Like most nonprofits this size, their time is stretched thin. K&FT knew they needed the benefits of case management software but were concerned with the time demands of how they could add learning something new to their daily schedule.

Solutions

BONTERRA CASE MANAGEMENT TRAINING AND IMPLEMENTATION

Bootcamp training for Case Management Enterprise gave Garcia and Huot a framework for how to use their case management software. Next steps included the nuances of K&FT’s different programs, variety of services and how to align Case Management in the best way to serve the organization.

Huot and Garcia worked together to plan the implementation of Case Management. As Garcia noted, “I think you really need to map out your agency and think about what each program needs.” Huot says many agencies use concrete outcomes to measure success. Because K&FT’s programs are often focused on emotional support and therapy, outcomes are less tangible. Instead, they use pre-and postsurvey information to measure success which influenced Case Management’s implementation.

K&FT has many programs of varying sizes, all with slightly different requirements. They started by working individually with the manager for each set of support programs to determine the program’s specific needs. Garcia and Huot created the “All-Program Contact Form,” where providers input all their case notes and needs assessments. They used the form logic extensively in order to utilize one form that covered multiple aspects and issues for various programs.

K&FT Creates First Annual Report to Tell Impact Story

Case Management has enabled them to demonstrate success of their programs with tangible numbers.

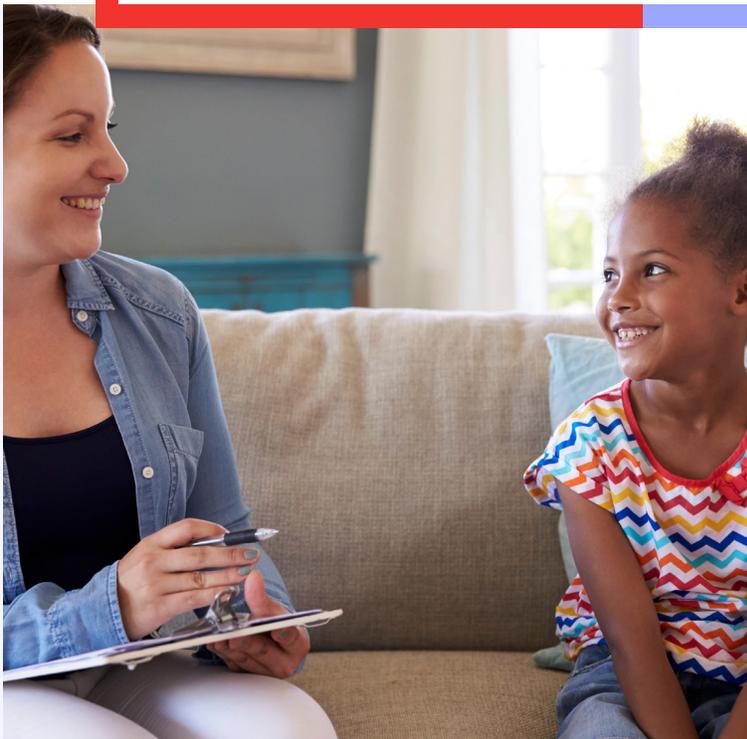
Huot and Garcia used a staged approach for their organization's adoption of Case Management, spacing out each program in terms of process, customization, time to learn and adopt the new system, and testing in phases how Case Management was working with each set of programs. When they felt comfortable, they trained the corresponding staff and would move on to the next group.

Every time they worked on a new group, their use and knowledge of Case Management improved. They understood it better, so they could avoid some of the issues encountered in previous programs. In addition, Bonterra Program Management's Case Management solution was extremely helpful and frequently used as they were implementing.



“ We chose Case Management because I was comfortable with it. It felt easy to use and easy to look at on the screen. Budget was also a part of it.”

- Amy Huot, Outreach Manager



“Learning how to use all the features in Case Management has been a fun adventure,” Garcia said. And Huot added, “Once I get a little foothold, and I understand how this is working, my brain really wants to get in and experiment with all the different filters and ways you can organize things. When introducing Case Management to our staff, we started small and progressed section by section. When our program managers saw all that Case Management could do, they were excited to get away from spreadsheets, save time and make their lives easier.”



REPORT BUILDER

Data is consolidated into an easy-to-use format with drag and drop form building, sorting data in just a few clicks. This feature gives K&FT the ability to report on things they couldn't report on before, such as simple demographic information like zip code or race. Running a report that could previously take multiple hours or days now takes about an hour.

USER PERMISSIONS MAINTAIN CONFIDENTIALITY

Case Management allows specific limiting permissions to be set depending on each user's needs. Doing this permits users both externally and internally, such as county officials and K&FT staff, to access specific information, meeting confidentiality requirements.

Impact

CREATIVE USES OF CASE MANAGEMENT

K&FT has been excited to discover all of the different ways they can use the reporting capabilities in Case Management. In various situations, they find solutions to problems that were not possible before. For example, in a recent search to find potential people for a specific role they needed to hire, K&FT created a custom report that immediately provided a list of qualified candidates. "The fact that we could do this is amazing," said Huot.

K&FT's ability to run reports in new ways has enabled them to provide the help necessary for at-risk kids. They recently created an advocate report for their program that supports youth at risk of commercial sexual exploitation. By screening these daily generated reports, the program manager can effectively monitor children of concern to determine if action is needed. This process was considerably more challenging and tedious without Case Management. Now, kids are protected in a more timely manner, and the chance of any child falling through the cracks decreases.

STAFF COLLABORATION

With Case Management, staff can connect with each other more easily. For example, a therapist may know which peer partner is working with a family and that peer partner may also be a client in a different program. The ability to share information and see which individuals are in various programs at the same time helps the organization be less siloed. The result is an increase in collaboration of staff and participants and the ability for K&FT to provide the best care possible to the people they serve.

REVIEW OF CASE NOTES

Entering case notes into Case Management is now much easier and more efficient; staff can review and sign off on notes weekly or even daily. It has also allowed Garcia to better support her team who work with clients. She explains, "If something catches my eye that happened in a session and I want to discuss it further with them, I'm on top of it much sooner than if I were reviewing notes at the end of the month." K&FT to provide the best care possible to the people they serve.

FUNDING INFORMATION

K&FT has created customized reports in Case Management that identify donors and funding sources, giving them a comprehensive, efficient system for providing demographic data to monitor and track funding. This funding data informs the CEO and other leaders for strategic decision-making. The detail and accuracy of reports provided to funders and the county build confidence and trust. Additionally, K&FT uses the funding report to discover potential new grant opportunities.

FUTURE PLANS

With Case Management, K&FT has formed realistic goals for the future. The Peer Partner and Educator Program is the first fully digital program. They created forms to obtain consent, replacing a manual process. By building the consent forms in Case Management, they've streamlined their intake process, saving 300 hours of administration time and eliminating the need for travel time to deliver hard copy forms.

K&FT aims to become digital across the entire organization, moving away from the need to keep hard copy files. Huot and Garcia plan on expanding their use of Case Management, leveraging all the features to bring full benefit to the organization. Connect is one of these features they will utilize to track and communicate with volunteers more easily.

300 hours administrative time saved

As a result of one program's move from manual to digital consent forms, staff put more time back into their mission.

Summary

Adoption across the organization with program managers excited about the efficiency and ease Case Management has greatly benefitted Kids & Families Together, a mid-sized nonprofit organization with staff wearing multiple hats.

K&FT's innovative use of Case Management has helped them maximize their financial investment. By fully understanding the benefits of its customizable features that allow for creativity and customization according to an organization's needs, they have maximized efficiencies and can report on aspects that weren't available before Case Management.

K&FT has developed a keen knowledge of Case Management features and shown how they can be practically applied. A shining example is their utilization of more sophisticated data to inform program decisions and fundraising. With all they have accomplished, K&FT has built confidence that they can utilize even more available features to their advantage in the future.

“ We had a transition phase where we used both [Case Management and legacy] systems. This gave our program managers comfort and gave us time to work out any kinks to make sure we had Case Management set up as needed.”

- Karina Garcia,
Parent Support
Programs Manager

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