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How case management technology and an influx of funding helped Project QUEST respond to their community

Based out of San Antonio, Texas, Project QUEST works to strengthen the economy and transform lives by preparing individuals for in-demand, living-wage careers through skills training, support, and services.

VERTICAL
Workforce

SIZE
24 employees

LOCATION
San Antonio, TX

PARTICIPANTS SERVED
7,000+

Project QUEST was founded in 1992 in response to a massive manufacturing layoff resulting in the loss of 14,000 jobs. And, when COVID-19 hit in 2020, the city faced similar challenges with extreme layoffs on an even larger scale. In just a couple of months, San Antonio saw approximately 150,000 individuals apply for unemployment benefits. Many of these individuals were either unemployed, underemployed or under-skilled, and they needed the training Project QUEST offers to get back to work.

Fortunately, Project QUEST was up and running on Bonterra Program Management's (formerly Social Solutions) Case Management

Enterprise solution, which gave them the advantage of being able to rely on technology and the power of data to scale services. In addition, Project QUEST was awarded CARES Act funding, enabling them to respond quickly and effectively to the increased needs of their community.

We sat down with Lelani Mercado, Chief Program Officer at Project QUEST, to talk about how they used Bonterra Case Management Enterprise software and an influx of funding to embrace growth and tackle the challenges presented to San Antonians head-on.

First off, congrats on getting funding from the CARES Act—I know that helped so many organizations continue to provide services when they were most in need. Can you tell us about the funding sources and what type of programming it was specifically meant to target?

LELANI MERCADO | PROJECT QUEST

The City of San Antonio has traditionally funded Project QUEST because the city believes that workforce development in San Antonio is important. It's important to help individuals get their high school diplomas, get degrees, get certifications, and get back into a job that pays a living wage.

We also receive state funds through legislation, and we received the federal CARES funding indirectly through the city. Project QUEST was able to utilize the CARES funds to really scale our program. **We increased our program enrollment by 275%**.

BPM: Wow, that is a huge influx! Did this new funding come with any additional reporting requirements?

LM: Yes! As my fellow nonprofit workers know: every time you get new funding, you're asked for a new data element, a new demographic, or a new point of reference for each funding source.

Project QUEST has always provided support services, but these were weekly stipends, which were a new thing for us. So, this added a new data element that we had to produce within the Case Management Enterprise system, and we did it through an online payment request form, which we input into a new report that was required. The flexibility of Case Management Enterprise allowed us to create new reports based on each individual funder's needs.

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BPM: Based on your experience, what are the best practices organizations should have in place so that they are prepared for this type of situation?

LM: Project QUEST was really blessed that we decided to purchase a case management solution over five years ago, which is when we chose Bonterra Program Management's Case Management Enterprise solution. We integrated all of our data from an old database that really did not work for us. **A big reason for moving to a new system was so our team and coaches could be mobile and easily work outside the office while still collaborating and capturing data.**

We loved that Case Management [Enterprise] was web based and allowed us to take our laptops and actually take notes on campus while we're meeting with someone firsthand.

That was a game changer five-plus years ago, and then, a year ago, we wanted to try and make everything more virtual, so we went paperless. We added the Case Management Enterprise Connect portal, which integrates with the Case Management Enterprise database, to allow our participants or applicants to upload documents and access their own page. That was another game changer for Project QUEST—had we not had the portal prior to COVID hitting and we went virtual, we wouldn't have had a way to access those necessary documents. We wouldn't have had a way for participants to reach out to us or for our coaches to continue to do their job seamlessly. And it was made possible because of our case management database.

BPM: Can you share a little more about the flexibility within the data system and how that allows you to be an agile organization?

LM: I can't say enough about what our coaches and our team who access the Bonterra Case Management Enterprise database are able to do. They're able to build their own reports. They're able to create notes for a number of participants instead of making one note per person, and this flexibility is huge. It saves our coaches, who often have 200 individuals on their caseload and don't have the opportunity to make 10,000 notes for each person. **And then, of course, being able to access the database safely and securely from campus or their homes is just wonderful, especially for our coaches.** They always say that it's very user-friendly.

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SA: What did Project QUEST do to support the staff and make sure they were able to handle this huge surge in demand?

LM: I can't say enough about my team and how awesome they are and how much they want to help individuals in the community get back to work. They had the tools and were ready to do the work, and they were actually able to bring in more individuals because of the Connect portal.

The portal also made it less cumbersome for the people trying to apply.

We tried to make everything much easier, not only for our coaches and our team, but also for the participants. We look at things through the participant's eyes and experience. If it's a clunky or difficult experience, they're not going to want to enroll.

SA: So, tell me more about communicating with your clients more effectively. How has Case Management Enterprise allowed you to be able to do that in a virtual environment?

LM: We can send messages to our coaches, and we have different reports within Case Management Enterprise that allow us to trigger reminders when we haven't talked to a person in a while. Those triggers really help our coaches stay on track so that they're not as inundated, especially in a virtual world. This helps us to make sure we weren't leaving anyone behind.

SA: Is there anything else you want to share with other organizations that might find themselves in a situation similar to the one Project QUEST was in last year?

LM: I think that all nonprofit workers tend to be stuck in the day-in and day-out work. We're working really hard and it's **tough to take a step back and look at our strategy** to determine what we need to do as an organization over the next three years, five years, or ten years. **But we need to look at that**. There are going to be other circumstances that are similar to COVID-19 that can affect an organization. How are you planning for that?

Make sure your information is safe, secure, and accessible. **Invest in a technology system that allows you to scale and works for your staff, your participants, and your funders**. We don't have any time to waste.

IS YOUR ORGANIZATION READY TO LEVERAGE A POTENTIAL INCREASE IN FUNDING?

See our solutions

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