CaseWorthy™

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Increase Your Funding With
3 Essential Data Questions

Introduction

Human services organizations exist to help people, and that help takes many forms. The only imperative these organizations consistently share — whether they provide social services, physical or behavioral healthcare, educational support, employment services, or advocacy — is to improve the lives and circumstances of the people and communities they serve.

But how can you measure the amount of support you've provided, and how can you know (and tell others) that you are having an impact? There are three basic questions every organization should be always asking, and they can all be answered with data:

OUTPUT:
How much do we do?

EXPENSE:
How much do we spend?

IMPACT:
How does it matter?

The Power of Data

We're in the 21st century and data is power.

Data is the native language of powerful software systems and algorithms that can produce countless insights in an instant. These programs are already built, available, and ready to help, but to harness their power, we must apply our knowledge from their language.

Data in its rawest format can be overwhelming, and to utilize the data you've collected, you need to know what you're trying to glean from the information you've amassed. Once you connect quantitative numbers with the qualitative circumstances of the people you serve, you can produce virtually infinite reports at the touch of a button. These reports can improve operations and demonstrate your impact and viability for funding to stakeholders, donors, and your community.

70%

DONORS SAY TRANSPARENCY WAS VERY IMPORTANT

when deciding which organizations to support[1]

[1]https://www.guidestar.org/UpdateNonprofitProfile/transparency/

53%

MORE CONTRIBUTIONS THE FOLLOWING YEAR

Nonprofits that earned a ***GuideStar Seal of Transparency*** received than organizations with no Seal[1]

[1]https://www.guidestar.org/UpdateNonprofitProfile/transparency/

Data management can help nonprofits measure their impact by consolidating resources to collect, analyze, and report on their activities and outcomes. Some benefits of universal data collection and management are immediate while others rely on consistent, frequent analysis.

When you have a pool of accurate data to examine, you can:

Define Baselines

To track growth, you need to have a clear grasp of your starting point. Freshly collected data is invaluable as soon as it's captured, and it only becomes more powerful over time. Once data is captured, analyzed, and reported, your organization can establish several baselines for key performance indicators (KPIs). Depending on the kind of work your organization performs, you may need to pull a mixture of metrics that you can consistently reference operating capacity, client volume, available resources, costs and benefits, personnel, volunteers — whatever your organization does can be turned into data for comparison.

Improve Operations

As your organization completes tasks, meets with clients, and renders services, you can lean on data to identify trends in how efficiently you operate. Knowing what you can provide, how quickly you can provide it, and who receives your organization's resources can help you identify opportunities to improve workflows and offer support to the maximum number of clients in need.

Demonstrate Transparency

The operations and budgets of human services organizations and nonprofits are scrutinized more heavily than for-profit businesses. Stakeholders, clients, staff, volunteers, and donors all want to know what exactly they're working toward and whether their efforts are effective. Even without data collected over a long period of time to demonstrate trends and change, data can communicate the current impact of your organization's work. Having a record of what resources were allocated to whom instills confidence and trust among your team and sources of support — and can inspire more stakeholders to take action and get involved.

OUTPUT:
How Much Do We Do?

Before you can begin interpreting data, you need to consolidate the information you'll be analyzing. The best place to start? Dive into your metrics to get a sense of your organization's output. Consider what your organization does and how that can be quantified. Some key metrics to collect are:

Number of People Served

Human services organizations must keep track of the number of people they serve in order to have enough support to go around. This number is incredibly powerful for both internal planning and demonstrating impact to external stakeholders. Counting the individuals benefiting from your services allows you to allocate resources accordingly and solicit funding if you identify a deeper need for additional services.

Demographic Data

The question of "who" you're serving can have innumerable answers. Each individual served is completely unique, with their own age, income, health information, education level and needs, jobs and professional hurdles, and histories. By collecting a diverse range of information about each individual, you can measure trends and correlations in populations without simply reducing a human being to a number. Try to collect as much information about each individual as possible by leveraging comprehensive intakes and frequent assessments.

Resources Shared and Services Rendered

Here lies the heart of the question: what did we do, and how much of it? An organization's offering can be as diverse as the community it serves, or its services might be simple and straightforward, but there are tons of possible data points to collect, regardless.

If you distribute meals: how many meals have you distributed? To how many people? What types of meals are you serving? How many meals had to be modified due to dietary restrictions?

If your organization provides housing solutions: how many residential units did you fill with occupants? How many occupants were individuals and how many were families? How many more residential units are currently available?

Whatever your organization does, track the individuals served and the various forms of resources and support provided to each, no matter how small or infrequent. By getting granular with your data, you can compose powerful reports further down the road. Over time, these metrics will start to provide invaluable insights.

To understand your organization's current operations and communicate your organization's value, you need a flexible, customizable system that can change and evolve as your organization's offerings change, and as questions develop.

73%

OF LOCAL GOVERNMENT RESPONDENTS

to one survey said they were using data and analytics to improve their decision-making[2]

[2] https://icma.org/performance-ebook

Without data, your organization foregoes the potential for improvement. Without an established baseline for your organization's budget, capacity, operations, clients, and output, it is impossible to measure growth over time.

The time to start collecting data is right now, if not sooner.

Case Study: Joining the Future

DENVER RESCUE MISSION

The Denver Rescue Mission (DRM) is the oldest, full-service Christian organization in the Rocky Mountain region. They have been meeting the needs of the poor and homeless through emergency response services, community outreach, long-term rehabilitation, transitional programs, and assistance for permanent housing since 1892.

With such a long history of service, they were struggling to run accurate reports and outcomes. Staying HMIS-compliant became a challenge. Simply put, they were wasting valuable time and money and had outgrown their current system.

How CaseWorthy Helped

What Denver Rescue Mission needed most was a single database to handle their data and reporting.

Having the ability to securely share data amongst various mission locations offers caseworkers a more complete view of the people they're helping and all of the services being offered. Customizable forms created with our proprietary apBuilder™ streamlined intake processes and automated alerts. Our built-in eligibility engine helped match individuals with appropriate available resources and support. Automated incident reporting helped standardize and automate incident reports, securely transmitting information to the appropriate parties based on severity level. Scan cards validated headcounts and assisted with bed management while keeping shelter guests safe.

Through the years, CaseWorthy has continued to develop their case management software to adapt to an ever-changing HMIS and nonprofit market. DRM has continued to share their experiences with CaseWorthy to make us one of the best in the nonprofit human services case management software market.

> ***We chose CaseWorthy because of their advanced technology—constantly growing its case management software. They are dependable, constantly solving problems, and always keep up with our needs at the Denver Rescue Mission.***
>
> — John Morarie, Manager of Impact and Strategic Initiatives for Denver Rescue Mission

EXPENSE:
How Much Do We Spend?

Government entities and nonprofits providing care and services need to maximize their operations to meet often-sparse budget allocations they supplement with donations. Rather than maximizing profits over time, agencies need to anticipate their income and maximize their expenses to have the greatest impact on the most individuals.

Expenses are often more visible and criticized than incoming funds. The onus is on you, the fund recipient, to prove that you are worthy of public support. However, expense reports in the human services sector are more complex and nuanced than traditional for-profit financial reports.

Accounting software is one-dimensional: it tracks only the expenses, without the nuances of clients' unique needs or established priorities. Funds in, funds out — that's it. If you're working in health and human services, you need a system that can track funds, secured grants, donations, and expenses, and can justify these expenses to your stakeholders and contributors.

Your reports should encapsulate how dollars are utilized by telling people's stories, not just reporting transactions. With data, you can easily reflect on and share critical information, including:

Budgets and Planning

Budgets are necessary for just about any organization, but especially for nonprofits and government agencies. People depend on these programs and services, sometimes for survival, and the ability to create an accurate budget and stick to it can protect those you serve from devastating shortfalls.

Compliance and Eligibility

Compliance laws demand that nonprofits keep accurate financial records or risk losing their 501(c)(3) tax-exempt status (and thus, even more revenue). State and federal nonprofit corporation laws establish requirements for annual reporting and fundraising activities. You must be prepared to provide grantors with the verifiable data they need to be eligible to receive funds.

Transparency and Trust

Without transparency surrounding how resources are being utilized, fundraising and community involvement can decline, leaving you and those you serve without support. Conversely, a commitment to accurate reporting, transparency, and accountability will attract loyalty from donors and volunteers who trust you.

Money is necessary to render services – but it's the human element that matters most. A case management system blends data and storytelling so you can clearly articulate how funds are making a real difference.

IMPACT:
How Does It Matter?

Expenses are necessary, but the impact of those expenses must be measured. If expenses can be justified with positive outcomes, they (and you) will be welcomed and supported with donations, volunteers, and beneficial partnerships with like-minded organizations working toward similar goals.

It may seem daunting to translate the success of an organization into data. How can you put a number on the health and happiness of those you care for?

A client's sense of well-being is not something to be calculated, it's something to be discussed. Focus groups, interviews, surveys, and case notes are all invaluable data points for the individuals working with your organization. With robust data-collection channels, user portals, and smartphone applications, more of the individuals you serve can place their own information and insights into caseworkers' hands.

The KPIs established during the initial data collection phase will tell the story of your data for you. All your customized data points can be plotted along timelines to illustrate changes and trends, helping you identify successes and bottlenecks in your organization's workflows. Whether you are looking to improve your offerings, or share your achievements, these reports will do the work for you.

A mixture of qualitative and quantitative data will allow you to compile transparent, compelling stories of people you've served and how you served them.

Community Action Partnership (CAP) Lancaster: Measuring Results

The Community Action Partnership is Lancaster County's largest anti-poverty organization and boasts a service profile that interrupts inter-generational poverty with programs that assist families at every age and place in life. CAP Lancaster comprises a network of programs in just about every sector of human services, from children's educational support to utility assistance, to prisoner reentry support, and beyond.

With such a diverse array of populations and services offered throughout their community, CAP Lancaster had a unique challenge in deduplicating data in their system to accurately portray the impact of the organization as a whole. This proved difficult, since each program and its data existed in separate databases, and clients were required to enter their profile data each time they applied for assistance or enrolled in a program — even if they were already enrolled in another of CAP Lancaster's offerings.

How CaseWorthy Helped

By consolidating CAP Lancaster's databases into a single database, CaseWorthy was able to clean CAP Lancaster's data to save time and money for its administrative staff and case managers. Client data could be securely shared between support teams within separate programs. Filing compliance reports became faster and simpler. All agencies began collecting the same information so they could compare and report on the same data.

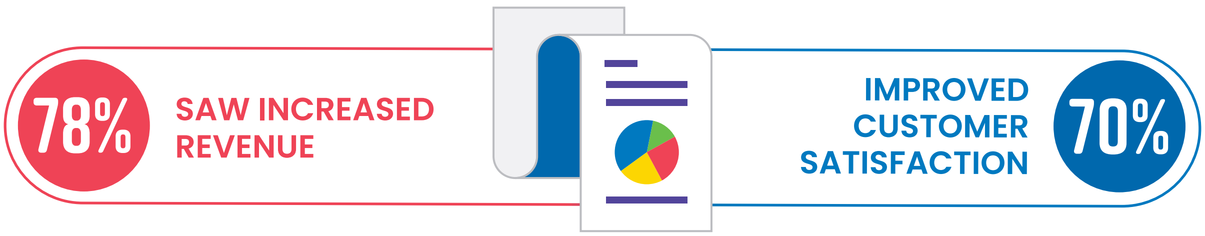
CAP Lancaster was able to combine all the data collected through their various programs to post impressive numbers about their impact to their community and donors. Through their freshly overhauled database reporting processes, they were able to determine they had served 353 partner organizations, 7,335 households in need of utility assistance, and 42,222 individuals in need of some form of support in a single year — nearly 8% of the entire county's population.

> ***The flexibility in CaseWorthy is my favorite feature. The ability to just pop in fields on the fly as we evolve and see what new type of questions or items we want to track. Adding that to an assessment cause is simple. Even building some simple reporting is pretty easy.***
>
> — Sheldon Kepiro, Director of Information Technology

You Need a System That Can Answer All of These Questions for You

When digital systems — no matter how powerful — can't communicate with one another, they essentially become digital filing cabinets, requiring trained users to visit them individually to retrieve and redistribute data. Manually transferring data from one system to another can take as much time as filling out paper-work, virtually eliminating the benefits of a move to digital systems. Plus, the more times data moves, the greater the chance of duplicate entries or other errors.

BUSINESSES THAT INTEGRATED DATA IN 2022



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When selecting a digital platform to support your organization, pay special attention to its ability to connect separate data streams and communicate with other digital platforms. With an interoperable platform, the data collected and stored within the system can be combined with and augmented by other publicly available data for more powerful insights with further reach. This allows organizations to operate more efficiently, with a clearer understanding of their clients' needs and the resources available to meet those needs.

If your organization is looking to grasp the power of data to improve operational efficiency, boost transpar-ency, and increase funding, talk to the human services experts at CaseWorthy. We would love to share what we know and what we can do.

A configurable case management platform built for the way nonprofits work.