

## CASE STUDY

### Island Senior Resources

#### BACKGROUND

Island Senior Resources (ISR) is an independent nonprofit 501(c)(3) that has been serving Island County (northwest Washington) since 1972. It stands as a cornerstone of support for seniors and adults with disabilities, their families, and caregivers throughout the county, offering vital resources and services that cater to their diverse needs. As the region's only private nonprofit offering such a broad range of resources, ISR has been a steadfast presence in the community, operating under the legal entity of Senior Services of Island County.

With a devoted team of 380 volunteers, the organization orchestrates impactful programs such as the Meals on Wheels Program, Volunteer Medical Transport Program, and Community Outreach initiatives, ensuring that approximately 5,000 active clients receive essential support. From one-off assistance with referrals to intensive case management services, ISR is committed to addressing the challenges associated with aging in Island County. Their work has fostered a community where individuals can live with dignity and resilience.

Mel has been an integral part of ISR since 2013, contributing expertise and dedication in various capacities. Most notably, from 2015 to 2020, Mel served as the Director of Adult Day Programs, transitioning to the role of Analyst and Case Manager in 2020. Mel played a pivotal role in researching, implementing, and customizing Better Impact, that serves as ISR's dedicated volunteer and client management software.

Prior to transitioning to Volunteer and Client Impact, ISR primarily relied on manual systems such as paper records and Excel spreadsheets to manage their volunteers and clients.

#### CHALLENGES

ISR had been slowly inching towards modernizing its operations when the Covid-19 pandemic hit. Suddenly, it became clear that the time for change had arrived. They urgently needed to implement a centralized system to improve services and cut down on duplication.

Before transitioning to Volunteer + Client Impact, ISR faced a few challenges with their old systems. Each department was running as an almost independent program, with its own systems and databases held in filing cabinets and computer hard drives. This isolation led to a mess of duplications and inconsistencies across departments, making reporting and accuracy a headache. Worst of all, it made it difficult to offer clients the support they needed, with departments often unaware of each other's activities.

According to Mel, challenges arose concerning reporting, accuracy, and overall organizational awareness, particularly in contrast to the specific program a volunteer or staff member may be affiliated with. "It was a challenge to offer a client-centered approach to support, where each department could see clearly, the requests and needs across programs, plan for what may be needed in the short and long term and respond appropriately."

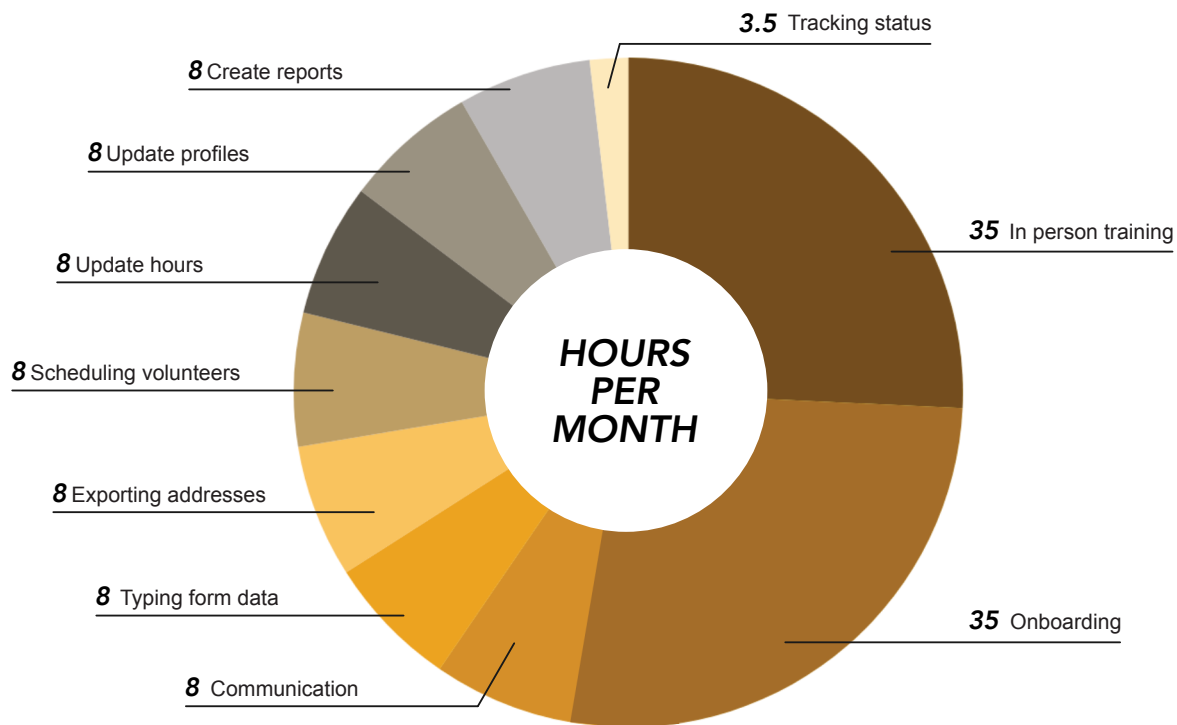
## Key Pain Points:

- Several tasks were manual.
- Reporting and data were not accurate.
- There was so much time wasted.
- No clear view of different departments requests and needs.

*“It was hard for each department to understand what was happening in the other departments, with these kinds of siloed processes. Different programs, having different managers, responding to their clients’ needs and not necessarily going beyond the borders of their program very often. When you add up the staff time and resources, there was a lot of wastage.”*

*– Mel Watson, Aging and Disability Resources Manager*

When Mel used the [ROI Calculator](#) to determine how much time was being spent operating in this manner, it revealed that her team was going to save around **1,544 hours** per year on tasks that could be automated via a volunteer management software solution.



## ROI Calculator Data



**Hours Saved:**  
**1,544 per year**



**Value of time:**  
**\$26,692 per year**



**ROI:**  
**9,797%**

## JOURNEY

Mel became increasingly aware of the extensive data stored in Excel spreadsheets, finding the repetitive task of revisiting them again and again burdensome. Consequently, she began exploring alternative solutions and initiated discussions with both her superiors and colleagues. This sparked a conversation around implementing a centralized database system, engaging everyone in the dialogue. In September 2020, ISR initiated the quest for new software.

To enhance their software selection process, a dedicated database committee was formed with the specific goal of researching and evaluating their organizational needs in comparison to the available products on the market. This involved conducting a comprehensive needs assessment, arranging product demonstrations, obtaining quotes, and conducting trials. As Mel recalls, "We collectively gathered what we thought were potential options and meticulously compared their features against our requirements. Sometimes, you don't even know what you need until you start researching, and then you realize what options are out there that you didn't even consider at first."

The committee explored six different volunteer and client management systems. Mel had already embarked on her own investigation, but as she reflects, "We collectively delved into extensive research, identifying potential candidates and scrutinizing their capabilities. It was a learning curve for us, transitioning from our antiquated processes to embracing modern solutions." They were highly motivated to seek change because managing hundreds of volunteers with manual spreadsheet processes had become too difficult.

Mel recalls that after extensive trials and evaluations "it became evident that Better Impact emerged as the standout choice for us. I pleaded with my superiors, driven by the sheer frustration of handling vast amounts of data manually. It was no longer sustainable, especially with the increasing volume of volunteers and the intricate details we needed to track."

### Implementation

ISR began utilizing Volunteer Impact in November 2020, a decision that marked the initial step in their transition to a more efficient system. Recognizing the need for a comprehensive solution, they subsequently added Client Impact into their operations. Reflecting on the process, Mel notes, "Adding the client module was a logical progression in enhancing our services." Additionally, they incorporated a member module tailored for specific community partners, such as private in-home caregivers.

While the implementation of new software is an ongoing endeavor, Mel highlights the early successes, stating, "People being able to log in their own hours it's saving so much time already, even with incomplete implementation. We're steadily progressing toward full integration with our volunteer base."

*"It took a lot of communicating to try to get people connected to a new software for the program. It's very different now (two years on), it's seamless"*

*– Mel Watson, Aging and Disability Resources Manager*

## Why Volunteer and Client Impact

Here are the reasons Mel and her team chose Volunteer Impact + Client Impact:

- **Security** – It was one of our most important concerns, with our Finance Director insisting on the software's compliance with HIPAA regulations.
- **Customization** – The ability to customize has been phenomenal for us. As part of my responsibilities, I reviewed our diverse forms for data collection and adapted Better Impact accordingly. We have five different volunteer sub-accounts, and each one uses customization in different ways. It's just wonderful that we can input data and decide who gets to see it or not across these accounts.
- **Ease of Use** - At ISR, we face the challenge of varying levels of computer literacy among our staff. Some other systems we've encountered were overly complex, but Better Impact has excelled in making its interface accessible. I love that the software is so customizable and easy to use!
- **Customer Support** - There have been instances when I've been online late at night, around 11:30 pm, with a burning question. Despite the hour, I reached out, and to my surprise, someone from Better Impact on the other side of the world promptly responded, which was fantastic. Their customer support is excellent, always there to assist. Moreover, Better Impact is receptive to customer feedback, offering opportunities for system improvement based on our ideas, which is great.
- **Unlimited tailored admins** – We offer administrators varying levels of access, from restricted visibility to full administrative control, allowing them to oversee all sub-accounts at the enterprise level and make necessary adjustments. The system is highly adaptable, enabling users to access specific sections or the entirety of it, depending on their role and needs.

For Mel and her team, their top Volunteer + Client Impact features are:

- **Customizable application forms** – Take, for example, our 'help request' form, equipped with a QR code for easy community access to resource and support requests. We've extended its use to community partners like emergency services, professionals, hospitals, and social services. They create their own accounts, enabling them to refer clients they're assisting—a fantastic feature indeed.
- **Client Connection Tool** – We use it in two main ways: firstly, for volunteers like medical transport personnel who need client information on-the-go, and secondly, for our case management staff to access volunteer tools for client encounters and in-home visits, ensuring seamless access to crucial information. It's amazing how it enables both volunteers and staff to have easy access to client details and resources, enhancing efficiency and coordination.
- **Internal client note update process using BI email and referrals** - This has been a game changer for us. It functions akin to a ticketing system, where staff can log interactions and responses, ensuring proper documentation. With just a click, we can access a client's complete service history across departments, including service timelines and interactions. Coupled with customizable fields, this system provides us with a deep understanding of our clients, reinforcing our commitment to being a client-centered organization.
- **QR code logins for our Thrift Store Volunteers** – It provides with multiple convenient options for access. Volunteers can have the QR code on their name tag or obtain it through the app on their phone. Alternatively, they can utilize a card system where they pick up their card and scan it at the camera, or simply log in using their username.
- **Reports** – They now run directly from Finance, reducing time in staff creating reports. I'm thrilled about this, and our Finance department is equally pleased. We're now generating reports that we didn't even know existed before!

*“There are so many options in Better Impact, ways of looking at clients and volunteers that we weren’t able to do in the past. We simply did not have the time or capacity to create those reports before.”*

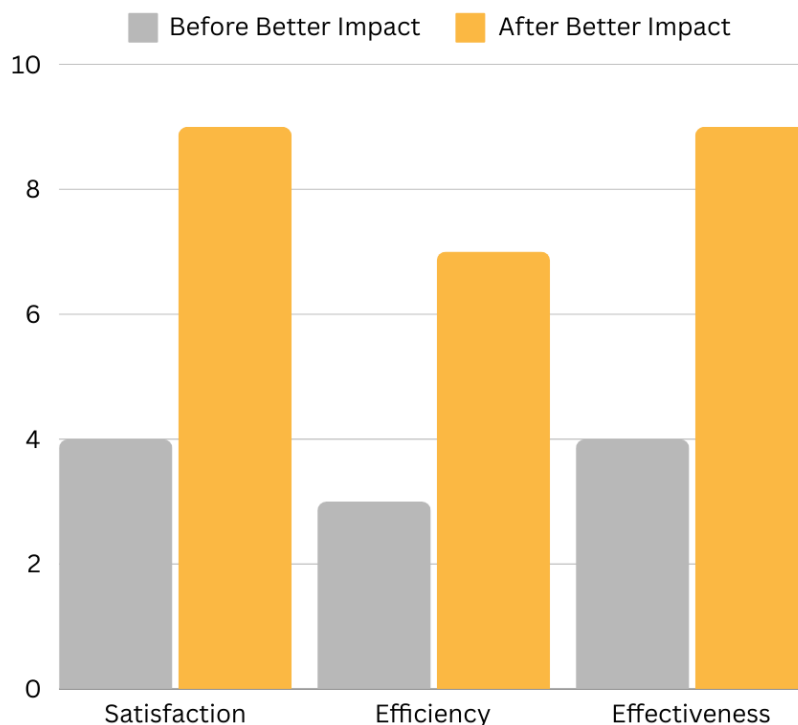
*– Mel Watson, Aging and Disability Resources Manager*

## Lessons Learned

In reflecting on their journey, ISR acknowledges the significant cultural shift that meant to transition to a centralized volunteer and client management system, with implementation still ongoing. As Mel states, “The investment needs to come from managers, and within that pool, there needs to be staff who are committed to seeing the process through.”

ISR is fortunate to possess such a dedicated team, maintaining focus on their objectives and navigating challenges with patience, effective communication, compassion, and grace. Their experience highlights the importance of perseverance and teamwork in overcoming obstacles encountered during software implementation, offering valuable lessons for other organizations embarking on similar projects.

## RESULTS



Since transitioning to Volunteer + Client Impact, Mel and her colleagues have redirected their focus towards enhancing service quality and promptly addressing the evolving needs of their clients. This newfound efficiency has enabled them to devote more attention to program development and fostering meaningful engagement with both volunteers and clients, ensuring a higher standard of care and satisfaction.

Other areas where Mel and her team have seen results with Better Impact:

- **Updating Volunteer Profile Information:** We've improved the process of keeping volunteer profiles up to date, which is crucial for our audits with organizations like the Northwest Regional Council. This means entering data once and having our finance department easily extract it for reporting purposes. It's been amazing to see how efficient this process has become.
- **Transitioning Larger Programs:** While we're still in the process of transitioning our larger programs, the impact has already been significant. Automating tasks like timecard processing for our food store volunteers has saved us a lot of time, even without full implementation yet.
- **Scheduling Volunteers:** In our medical transport department, we've made scheduling volunteers much more flexible. Volunteers can now choose their tasks, reducing the time previously spent making numerous phone calls to find available drivers. This has been a noticeable improvement over time.
- **Exporting Addresses and Emailing Volunteers:** The ability to export addresses and email volunteers has been a game changer for us, saving us a considerable amount of time.
- **Conducting In-Person Training:** Our in-person training process has undergone a complete transformation. It's now much smoother and continues to improve, which is wonderful.

For those who are embarking on the journey of finding one platform to manage their volunteer + client data, Mel emphasizes the importance of clarity in goal setting, consistency in approach, and meticulous planning. She highlights the need to remain adaptable and open to updates throughout the implementation process. As she reflects, "Make sure you have a person or people who are committed to seeing the project of implementation through, especially those in leadership roles." She also underscores the transformative potential of transitioning to a unified platform, encouraging her peers to capitalize on trial opportunities to familiarize themselves with the system's capabilities.

*"Better Impact has allowed us to truly become a client-centered organization, granting us the ability to be more responsive. Moving forward we see so much room for growth and improvement and look forward to the time when all our departments are using Better Impact to its fullest capacity."*

*– Mel Watson, Aging and Disability Resources Manager*

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