



Overview

The need

Nonprofit operating system that streamlines processes and enables accurate and reportable metrics to more easily prove impact and better serve families.

The solution

501ops business process improvement and tailored program management operationalizes CEC's data and provides accessible reporting and powerful analytics.

The benefit

Strengthened service for children, adults, and families.

Streamlined process for staff.

Stronger data for the organization.

COMMUNITY ENRICHMENT CENTER

Creating Capacity & a Culture of Service: an operating system that transformed the experience of the client served and streamlined operations agency-wide.

The vision of Community Enrichment Center (CEC) is to break the cycle of poverty and family violence in Northeast Tarrant County. Annually, CEC provides nearly 27,000 individuals access to pathways out of poverty. Services range from employment and financial coaching, high school equivalency education, adult literacy, counseling for victims of crimes, affordable housing, resource referral, parenting classes, and food assistance.

OVERVIEW

Strengthen Client for Stronger Data

Prior to 501ops, CEC utilized a standard case management system, numerous excel spreadsheets, and paper forms to track client progression across their nine social service programs. Not unlike other multi-faceted nonprofit organizations, each program department utilized different methods and sources to collect and store data, producing ad-hoc reports needed for their own departmental evaluations. Because their case management system failed to produce reportable data that enabled them to track client progression, they resorted to Excel. As a result, data lacked standardization and made agency-wide data aggregation challenging.

Before any new technology solution, 501ops began by assessing the workflow of each program and lead staff to streamline internal processes and define metrics across departmental silos.

501ops tailored the software to the nonprofit's service delivery model to make it more useable and client friendly. Because the system made a positive impact on the end user – CEC's clients and staff – the 501ops system was adopted organization-wide and replaced all autonomous shadow systems. The 501ops system became **fundamental to CEC's daily operations**, integral to running their programs.

Strengthening client interaction and service is the goal. Strong data is the natural byproduct.





INCREASING PERSONALIZATION VIA AUTOMATION

501ops architected the system to mirror CEC's intake forms so staff could utilize the system to interview new clients instead of translating paper forms. The architected forms were smart – changing based on the client's answer, making the data input information easier to manage while interacting with the client. All data entry – demographic and programmatic – became standardized based on requirements of the system. Field standardization and adaptation estimated saving CEC staff approximately seven hours per week in data entry and management, keeping the staff focused on building a personal relationship with the client.

501ops also automated inner-agency program referrals. If a new client expresses interest in additional services, the system triggers follow-up actions across internal departments. The system signals each department lead to follow up, already having access to the information needed to more quickly and more personally address the client's need. All completed with a check of a box.

Instead of automation that limits human interaction, our system increases human connection – both between internal staff and between staff and client.

IMPROVED PROGRAM MANAGEMENT

Food Pantry

CEC distributes food to over 1,000 families each month. Prior to 501ops, CEC would track all food pantry data via paper and multiple excel spreadsheets to manage inventory projections.

501ops streamlined and systematized this process to eliminate duplicate entry. Now upon logging into the 501ops system, the entire agency can easily visualize the number of food pick-ups and the actual weighted amounts of food distributed **daily**. 501ops configured a dashboard that automatically produces the daily counts, monthly totals, and monthly averages. Dashboards allow CEC staff to manage inventory projections more seamlessly and perform monthly comparisons.

Beyond food weights, monthly projections and totals, 501ops also calculates the number of individuals and families who were served meals by county. Because of this data, CEC became a trusted informant to local leaders of the areas of saturated need in their communities.

“You are not only giving us a great system, by asking the questions you are asking, you are making us think through the way we have always done things and imagining that more is possible. You are making us better.”

- Ronnie Parish, Vice President of Community Services
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Financial Coaching & Employment Services

For programs requiring case management, such as financial coaching and employment services, the system's design is to improve the interaction between client and coach. Screens are designed so case managers can enter information live into the system during a coaching session – whether on a computer or tablet. Within each client's program record, recent interactions and notes are captured on one screen so a case manager can easily scan through a client's history. With CEC's prior system, managers spent significant amounts of time manually aggregating client information. Now managers can quickly and easily see the distribution of caseloads, client demographics, and client progression to more strategically manage case assignments.

Additionally, all screens are built to track metrics necessary for determining client progression over time and all information is collected in a manner that is easily reportable and aggregated. As a result, directors can visualize program impact and perform trend analysis over time.

501ops has customized dashboards to perform summary analysis of outputs and outcomes within each department and for the organization as a whole. For employment, department managers need to see the time required to attain stable employment and reach a living wage. The system compares the monthly income of participants when entering the program and when exiting for succinct client progression as well as other key performance indicators for asset growth.

CEC also now can track and aggregate dollars spent on resources distributed to clients by dollar amount and by type (i.e. food pantry, bus pass, clothing, gas card, rent assistance, utilities assistance). With this data, CEC can address the greatest and most frequent needs, examine the reason for the need, and consider systemic solutions to repeatable trends.

VOLUNTEER MANAGEMENT

CEC recruits volunteers for two primary purposes: the food pantry and community events. The food pantry utilizes up to 50 volunteers daily while community events – whether it be service or fundraising oriented – utilizes up to 500 volunteers five times per year.

Before 501ops, CEC managed volunteer recruitment, registration, and retention via paper, email, and excel. Volunteers registered on paper and a staff member manually entered information into excel to track volunteer hours. Not only was this process time

“I’ve been through three or four implementations and all have been miserable except for this one.

“This one I’m actually excited to get in and pull up the system and look at my reports.

My volunteers and staff love it. And, it’s easy to use. You all have done great work.”

- Jere McCully, Intake Manager at Food Pantry
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The experience of those you serve is the number one priority for 501ops.

The 501ops motto is systems designed with the end-user in mind – whether that user be the client served, the staff, or the volunteer.

Technology designed to improve the quality of life of both nonprofit clients and staff. Strong data becomes a byproduct of better operations.

consuming but also subject to human error and duplications with minimal ability to increase volunteer engagement. Additionally, no streamlined communication methods existed for staff or volunteer, requiring all scheduling to be completed via personal phone calls or emails.

The 501ops team optimized nonprofit volunteer management, tailored to CEC's specific events and reoccurring volunteer needs. For example, at CEC's largest event, Refresh, a back to school community event, which provides backpacks, school supplies, free eye exams, physicals, and food to approximately 1,700 children and their families annually. Behind the scenes, CEC seamlessly managed 437 volunteers performing 17 different volunteer activities with 18 shifts per activity with varying volunteer volumes.

To ensure efficiency for staff and volunteers, 501ops embedded a registration link on CEC's website which enabled volunteers to view an event calendar, description of each volunteer opportunity, sign-up, and receive automatic information pertinent to the logistics of the event post online registration. 501ops also built mobile forms for sign-in purposes at the event, which automatically fed into the system to track attendance and to enable follow-up engagement. The result is a more seamless registration experience for volunteers, increasing the willingness of a volunteer to re-engage, and easily report data on the nonprofit's greatest workforce – their volunteers.

Post event, CEC can now pull reports to determine the total number of volunteer hours, engage repeat volunteers, recruit new volunteers and target individuals by their interests. In addition, each individual volunteer's login shows their personal volunteer history in real time – the number of hours worked, the type of service completed, the ability to change their schedule and have the system automate notifications to CEC staff. With repeated use of the system, CEC can now analyze event success and volunteer retention year after year to strategize their engagement over time.

CONCLUSION

The experience of those you serve is the number one priority for 501ops. Our motto is systems design with the end-user in mind – whether that user be the client served, the staff, or the volunteer – experience is everything.

501ops believes technology should work for those who need it most, which is why we focus our design around improving the quality of life of both nonprofit clients and the staff that serve them.

Strong data becomes a byproduct of better operations.