



Guide

Elevate your case management with Impact Management software

A buyer's guide for nonprofit organizations





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The future of case management is impact management

Nonprofit organizations are expected to do more with less, facing increased demand for services, while also needing to improve efficiency and report on impact. However, in many cases, organizations do not have the staff capacity or technology resources to meet these demands. According to a [survey by the Council of Nonprofits](#), demand for services has outpaced service delivery with 24.4% of respondents reporting waiting lists of over a week. This increased demand for efficiency is leading to upticks in staff burnout and turnover.

Organizations are also expected to more rigorously demonstrate their impact in order to secure funding and meet compliance requirements. For the many organizations operating with outdated technology like spreadsheets and disparate systems, it can be challenging to collect accurate data to meet reporting requirements. According to [Building Movement Project](#), an overwhelming majority of organizations experience challenges with evaluating and reporting impact. This lack of data often leads to decreases in funding, keeping organizations from fulfilling their mission.

Bonterra has a solution that helps organizations meet and exceed today's increasing demands by doing more than just tracking and managing case information. Bonterra Impact Management was developed with impact at the forefront, allowing organizations and agencies to better manage their program data, easily report program outcomes, and benefit from a network of best practices and tools designed by industry experts. It's the only solution that brings together case management, impact measurement, and a network of best practices and support into the same platform.

Three key pillars of Bonterra Impact Management

1 Increase program capacity

Your organization can streamline workflows and standardize tech functionality, boost staff productivity, enhance usability and automation of your technology, and streamline participant engagement.

2 Measure program impact

We help your nonprofit adopt a comprehensive impact measurement framework and clearly communicate outcomes to funders and donors.

3 Improve program impact

You can drive more impact by improving your engagement with program participants and easily work with your network, from getting referrals to sharing compliance data with funders. Plus, we share insights to help you improve programming.

Interested in learning more about our vision for Bonterra Impact Management?

Download our guide. [“From case management to impact management.”](#)



How software can help elevate your organization's impact

Increase efficiency

Since many nonprofits are working with a lean team, it's crucial to streamline and simplify processes whenever possible. Bonterra Impact Management offers standardized functionality like best practice templates and configurations, while also storing all of your information in a single system, boosting your team's efficiency. This means you can easily customize data entry to your specific needs, access the data you need when you need it, and simplify reporting through templates allowing you to do more with the same lean team.

Boost staff satisfaction with enhanced usability and automation

Having tools that are easy to use is a great way to simplify your staff's daily processes, boost productivity, and ultimately reduce the risk of burnout. Bonterra Impact Management is simple and easy to use, so your staff can spend less time learning how to use the software and more time implementing and improving programs. Built-in automation options such as Rules and Alerts will ensure you can streamline workflows and stay on top of daily tasks.

Streamline and enhance participant experience

As a health and human services organization, you're working directly with your community daily. This means you need a simple way to stay in touch with program participants and ensure you're meeting their needs. Through Bonterra Impact Management, case workers have the tools they need to contact participants quickly and easily. This increased engagement can ultimately lead to lower program dropout rates and improved outcomes.

Implement an impact measurement framework and clearly demonstrate impact to funders

With demonstrating impact being one of the key challenges for nonprofit organizations, it's crucial that you have a solution that makes it easy. This is why Bonterra Impact Management makes measuring impact part of service delivery, not an add-on or a nice to have. Our solution features built-in interactive dashboards and report templates so you can monitor program performance, track outcomes, make evidence-based decisions, and seamlessly communicate outcomes back to funders and donors.



Ensure security and compliance

Having a secure platform is key when managing and tracking sensitive participant data. Plus, many organizations have strict compliance requirements they must meet. Bonterra Impact Management was developed with the highest security standards, meaning your data is always kept safe, confidential, and recoverable. This includes SOC 2 Type II, HIPAA, WCAG2, VPAT, and ISO 270001:2022 certification. Additionally, we have recently become GovCloud certified, and will continue with FedRAMP certification. Our solution uses a variety of authentication methods to prevent unauthorized access and restrict user access including Single Sign On (SSO), multi-factor authentication (MFA), and usernames and passwords. Roles and Permissions ensure only the correct people have access to certain information and can restrict or grant access to other users.

Leverage data and learn from a network of industry experts

External feedback can often be one of your most valuable resources when it comes to improving processes and programming to create more impact. This is why Bonterra Impact Management helps you identify this information and make the most of it. You can easily get referrals and share outcomes and compliance data with funders, making connecting with your network simple. Plus, we provide insights based on the success we've seen with similar programs, so you can create more impactful programming for your community.



Your software procurement roadmap

There are many advantages to utilizing Impact Management technology at your organization. Most notably, it will help you streamline and simplify processes, demonstrate your impact to secure more funding, and improve outcomes for those you serve. Now, you may be wondering where to even begin when it comes to finding an Impact Management solution for your organization. To help you get started, we've outlined the three key procurement steps you should take:



Step 1: Evaluate your organization's unique software needs

Before you begin looking at potential new solutions, it's important to make sure you have a solid understanding of your organization's unique needs and requirements. We've created the following checklist to help you reflect on your organization's current technology and needs, so you can determine your must-haves when exploring new software options:

- **Reporting:**
Do you need to be able to create custom reports and interactive dashboards so your team can monitor program performance, track outcomes, and make evidence-based decisions?
- **Permissions:**
Do you need to control who has access to which information in your system?
- **Integration:**
Do you need to be able to integrate your new software with existing tools for easy and consistent data management?
- **Process:**
Do you need to establish consistent processes and procedures to ensure efficiency and data accuracy?
- **Alerts:**
Do you need features that alert you when participants need help so you can better serve your community?
- **Consolidation:**
Do you need software that consolidates your data in one place so you have a single source of truth that everyone can leverage?
- **Funding:**
Do you need to be able to monitor funding sources and spending, ensuring you can meet grant requirements?
- **Security:**
Do you need a secure platform that meets specific security requirements such as SOC 2 Type II, HIPAA, WCAG2, etc.?
- **Referrals:**
Do you need referral capabilities to ensure program participants are receiving the support they need?
- **Access:**
Do you have multiple staff members who will need access to your solution?



Step 2: Evaluate potential solutions with the right questions

Now that you have reflected on your organization's unique needs, it's time to assess solutions to see which one is the best fit. The following questions will help you determine if a solution meets your organization's needs:

- How would you describe your solution's core capabilities?
- What types of data can customers track with your solution?
- Is your solution designed specifically for nonprofit organizations serving their communities?
- How will your case management platform help me demonstrate my organization's impact to funders?
- How much time is needed to invest in onboarding and implementing your solution?
- Is your solution customizable to my organization's unique needs?
- What kind of ongoing training and support is available for my staff?
- Is your solution SOC 2 Type II, HIPAA, WCAG2, VPAT, and/or ISO 270001:2022 certified?
- What do we need to budget to invest in your solution?

Step 3: Identify a champion and a sponsor for your procurement process

It's important to identify a champion and a sponsor to support your procurement journey. The champion is responsible for understanding the challenges you're facing and vetting potential solutions. The sponsor is the leader who not only has budget authority but can also support the implementation and adoption of the solution after purchase. Identifying these two stakeholders is key to ensuring you can secure an Impact Management solution for your organization.



Putting it all together

Bonterra Impact Management is purpose-built to help you overcome the increased demand for efficiency and outcome validation, so you can focus on improving programs and impacting the lives within your community. Learn how Bonterra Impact Management can empower your organization to elevate your case management.

[Request a demo today!](#)