

CASE STUDY

Jewish Social Service Agency (JSSA)

BACKGROUND

Jewish Social Service Agency (JSSA) is a human social services agency with a 120-year history of providing high-quality support and services to individuals and families facing life's consequential moments in the Washington DC metropolitan region. Concentrating on four key areas of care – Aging in Place, Mental Health, Hospice/Transitions, and Homecare and Employment Services programs – JSSA partners with hundreds of volunteers who are committed to improving individuals' lives and providing support to anyone who needs it, regardless of their religious background, race, or ethnicity. Volunteers provide a variety of services, including meals on wheels, office support, holiday baskets, personal shopping, tech tutoring, and friendly visitor programs.

Latisha Coleman joined JSSA during the height of the pandemic, in 2020, as a Senior Clinical Application Specialist, and was primarily tasked with supporting the software technology demands of the Hospice/Transitions, Premier Homecare and Mental Health programs. Latisha holds a bachelor's degree in computer science and has over 15 years of IT Healthcare experience in the administrative, emergency, inpatient, ambulatory and acute care settings. She enjoys delivering quality and user-friendly software solutions to make people's jobs more effective and efficient so they can focus on what matters most.

Driven by her commitment to hospice and palliative care, Connie Echeverria turned her calling into her career, and in 2019 joined the JSSA Hospice Team where she is currently Supervisor of Hospice Volunteer Services. She holds a bachelor's degree in social work from Catholic University, and she is most proud of her long history as a community volunteer.

Prior to choosing Volunteer Impact and Client Impact, JSSA utilized **Salesforce**, a CRM solution, which offered a built-in volunteer management module - **Volunteers for Salesforce (V4S)** - and a combination of other external tools, such as Excel and PDFs, were leaned on to manage the volunteers and clients (client being patients and members of the community receiving services from JSSA's Hospice/Transitions and Aging in Place programs).

CHALLENGES

Salesforce was primarily leaned on by JSSA for its donor program, and the organization aimed to use the V4S module to meet the demands of the volunteer program across the agency. However, V4S fell short and led to **significant administrative burdens** for their volunteer coordinators.

According to Connie, V4S was one step-up from paper files, and the onboarding process was **time-consuming**. They had to **manually enter volunteer hours** and, due to a lack of volunteer portal with which volunteers could engage and lean on as a centralized communication tool, **send a high volume of emails to try and keep volunteers informed**. With the COVID-19 pandemic, onboarding became even more challenging with a need to pivot and operate virtually.

*“These challenges created a **cumbersome administrative burden** in the form of daily communications with volunteers to carry out functions such as profile and document management, training coordination, and onboarding tracking.”*

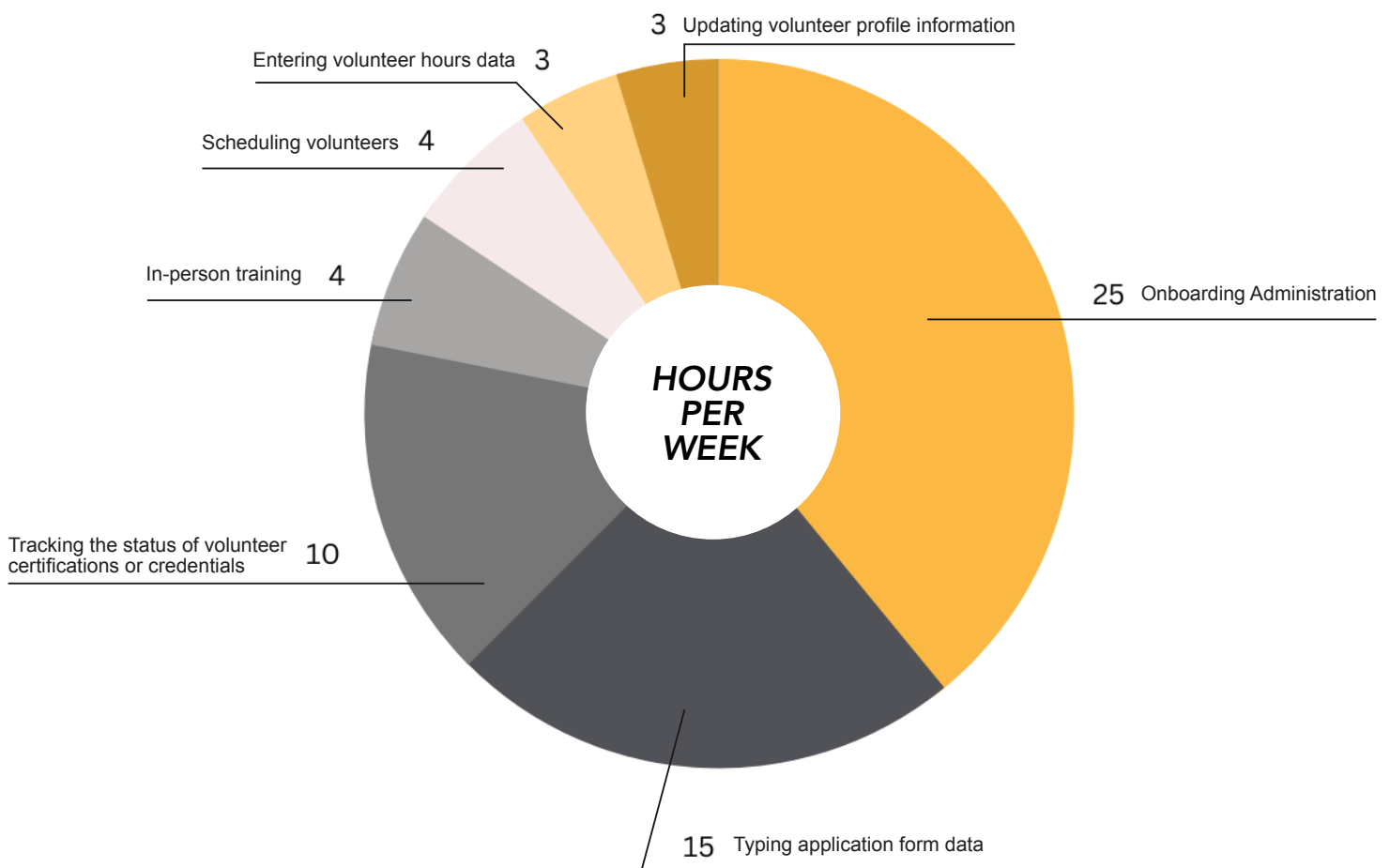
- Latisha Coleman

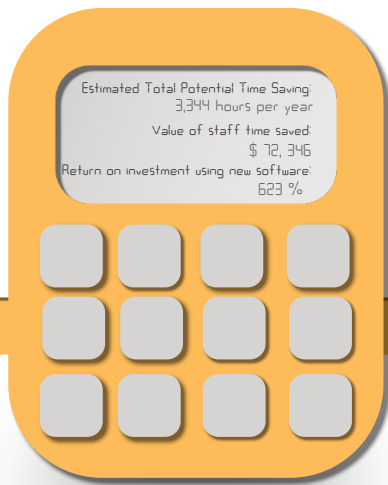
Key Pain Points:




- We had to make use of **too many spreadsheets** and PDFs to manage volunteers.
- **Reporting was difficult.** Our programs are audit and regulation heavy, so reporting needed to be much easier.
- Our previous system was **not customizable** at all and had challenges with shared clients across programs.
- The **system lacked important features and functionality** such as not offering a volunteer interface for profile management, self-scheduling, training module support, nor communications.

When Latisha and Connie used the [ROI Calculator](#) to determine how much time was being spent operating with insufficient tools, it revealed that they were going to save around 3,344 hours per year on tasks that could be automated via a volunteer management software (VMS) solution.

Here's a breakdown on how much time was spent in various tasks before using Better Impact:





Hours Saved	Value of Time	ROI
		
3,344	\$ 72,346	623

JOURNEY

When JSSA recognized that Salesforce was not meeting the demands of the donor and volunteer programs, they explored and selected another solution – Virtuous. However, during the phase of migrating their donor program data into the new system, it was identified that Virtuous did not offer a volunteer management tool and the other donor modules were either expensive, not secure, not customizable, or could not accommodate the client-volunteer connection requirements or their organization.

It was through this experience that JSSA concluded to separately explore donor and volunteer program solutions and set out to find one specifically tailored to volunteer programs where volunteers engage with the clients the organization serves.

And, so, JSSA’s journey of finding a volunteer and client management software solution began in 2021. Several **teams**, including IT, development, executive leadership, hospice, and aging in place, **collaborated** on this project, with Latisha serving as the project manager.

JSSA hired a **consultant** to capture **user stories/reviews**, **software requirements**, and **agency needs**. Connie recalls, “it was vital in our process to have a consultant talk to all the different teams in our agency and identify what our needs were and prioritize them.” Connie stresses that **this step was critical** in helping them identify essential requirements, such as HIPAA compliance for their hospice system; whereas other areas of the agency did not require the same level of compliance.

The next step involved scheduling software **demos** with several vendors to determine if they met the minimum requirements. According to Latisha, having a list of must-haves, nice-to-have, and good-to-have features enabled them to effectively evaluate software solutions during the demo phase, as it allowed them to check off the boxes and select who the contenders would be.

Quotes were requested from contenders and JSSA held a **final meeting with their internal stakeholders** to evaluate their top 5 contenders. After much discussion and careful consideration, they unanimously decided that Volunteer Impact and Client Impact would be the best software solutions for their agency. Connie adds, “these two integrated solutions met a lot of our initial needs identified in the consulting phase.”

Implementation

In November 2022, JSSA started implementing Volunteer Impact and Client Impact.

Connie expressed an initial concern about transitioning to the new software due to her lack of technical expertise, but she and Latisha ended up configuring a lot of the system themselves with the help of strong training from the Better Impact support team. She adds, “**the software is incredibly user-friendly** and easy to use; even for those who are not necessarily computer savvy. If you can copy and paste a link you can build your entire infrastructure in the system.”

*“Our experience with **customer service has been exceptional** from the initial sales phase to the implementation stage. The member support team is amazing, providing various resources such as instructional videos, step-by-step guides, and implementation consultants. That’s one of the reasons why we have been so successful. As someone who has worked with numerous applications over the last two decades, I can confidently say **this is one of the best groups of support people that I’ve worked with.**”*

- Latisha Coleman

Why Volunteer Impact & Client Impact

Here are some reasons for choosing Volunteer Impact and Client Impact over other options JSSA explored:

- **HIPAA Compliant** (Health Insurance Portability and Accountability Act) - knowing our data is secure is not only of great importance but brings confidence to our operations.
- **Integration** – Volunteer Impact and Client Impact integrate seamlessly for the management of these different stakeholders and programs while allowing secure crossover of data management and access when volunteers serve or are matched to clients. We are connecting volunteers to clients, sharing notes/contact details with volunteers associated with a client, associating a client to an activity and reporting on volunteer interactions with clients.
- **Volunteer Profile Management** and **Self-Scheduling** – volunteers can update their contact information, their references, they can communicate directly and in a secure manner with the Volunteer Coordinator. Having volunteers being able to manage their engagement independently frees up our team to focus on other important program items.
- **eLearning Modules** – this feature is amazing! The scheduling property of the software allows volunteers to see and sign up for opportunities based on their qualifications, which are updated by successful completion of e-Learning modules.
- **Secure Communications** – specifically being able to share confidential program or client information with volunteers directly within the software.
- **Reporting** – this robust area of the software is intuitive and customizable.
- **Mobile App** – Volunteers can access their MyImpact app, from their mobile devices, to manage their volunteerism while on the go and don’t need to report to a desktop.
- **Social Media Presence** – The current social media integration is more deeply embedded than a previous system, which is highly beneficial.

- **Customization** – I can't emphasize this enough! It allows for the creation of multiple fields that can be associated with one or both programs which is a great time-saver.
- **User Friendly** – After all, I did mention I was able to set up the system and I consider myself to not be very tech savvy. 😊
- **Value** – We receive numerous benefits since finding a home for our two programs. Volunteer Impact and Client Impact offer great value for volunteer programs that work directly with patients or serve community members.

Words of Wisdom

Latisha advises to do a thorough job at gathering your software requirements across the various departments/users and collecting reviews or feedback from others who have vetted systems before or are making use of the types of solutions you are seeking. Documenting your needs helps score vendors on how well they meet your requirements. Take a deep dive into the exploration of your various needs when researching or meeting with the software vendors. Explore eLearning module capabilities for easier volunteer training and onboarding, the security of program communications and info sharing, integration needs, and how activities will be managed. She also recommends considering specialty programs you may have that require volunteer-client matching and reporting.

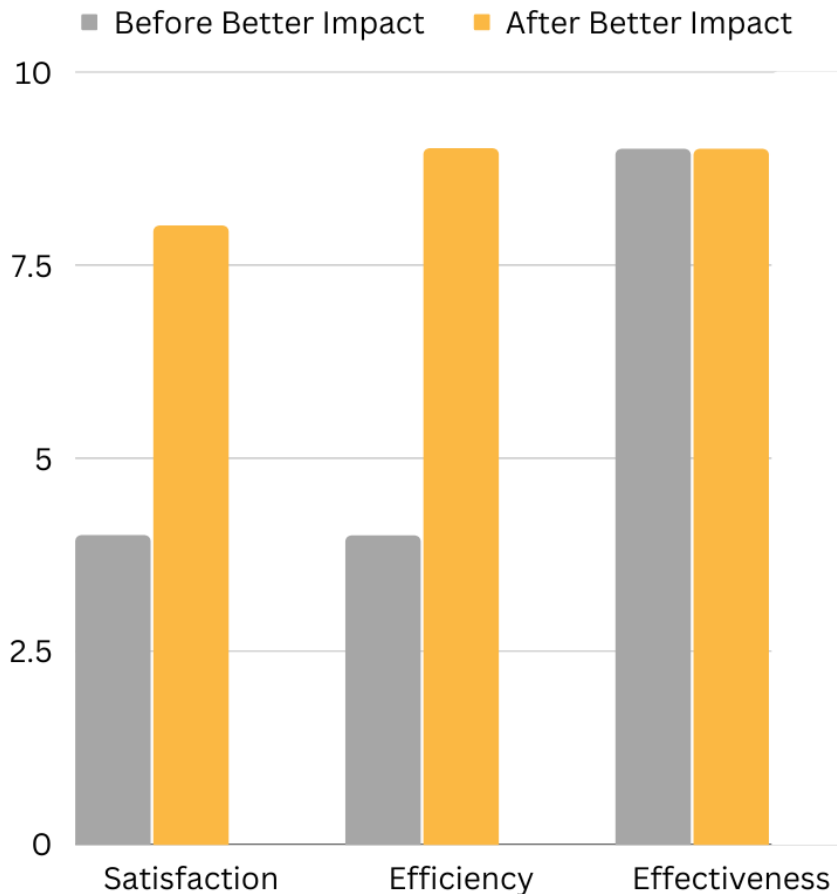
*"When choosing a volunteer and/or client management solution, we want to emphasize the **importance of including all key stakeholders throughout the journey**, to make sure you are making the right decision for your programs and teams. Transitioning from antiquated processes won't be easy, at first, but appreciated in the end once staff realize how much time they have earned to focus on engagement, recruitment, and volunteer opportunities."*

- Latisha Coleman

RESULTS

Latisha and Connie have these significant experiences to share that have resulted since implementing Volunteer and Client Impact, which include:

- **Secure System.** Their most observed benefit is knowing the **client information is uncompromised** since the software is secure and **HIPPA Compliant**. "We opted to implement both the Volunteer and Client Module as the matches are truly remarkable. We wanted to ensure we could safely and effectively place patients into the system and match them with volunteers based on various criteria such as location. Having a HIPAA compliant system that our volunteers could access and communicate with us through was a top priority," Connie explained.
- **More Efficient.** By seamlessly integrating Volunteer Impact with their onboarding platform, they were able to **reduce the admin burden** for their staff. This has enabled them to devote more time to recruiting, meeting, and engaging with their volunteers, which in turn has led to an expansion of their volunteer base so they can cater to a larger number of clients.
- **Happy Volunteers.** Their volunteers are happy they can now maintain their profiles, availability, self-schedule and communicate securely with volunteer coordinators. They have more control of their activities and their contribution to our agency



*“Before we made the systems switch, I was unaware of how ineffective our volunteer recruitment efforts were until we really looked at the time we spent on such tasks. We were having to work more, and harder, to remain effective while not compromising on our program delivery standards. The move to Volunteer and Client Impact allowed us to systemize our operation and **work smarter**. We’ve been able to **recruit so much more** and have **more time to interact with volunteers** than we did before.”*

– Connie Echeverria

*“We encourage any volunteer program or client-serving volunteer program to explore Better Impact’s solutions – Volunteer Impact and/or Client Impact – if your organization is lacking a software solution, currently has a solution in place that is not optimal, or perhaps is being retired. **Volunteer Impact and Client Impact are highly customizable to meet program and stakeholder needs.**”*

- Latisha Coleman

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