



With Streamlined Processes, Nonprofit Organization Helps More People Find Work Faster

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Becky Ketts, Rehabilitation Services Manager, Tommy Nobis Center

Customer: Tommy Nobis Center

Customer Size: 150 employees

Country or Region: United States

Industry: Nonprofit

Partners: Computer Technology Solutions (CTS), TechBridge

Customer Overview

Located in Marietta, Georgia, the Tommy Nobis Center provides job training, employment, and vocational support for youth and adults with disabilities and other barriers to employment. Since 1977, the organization has helped more than 20,000 individuals enjoy productive and independent lives while contributing to the greater Atlanta business community.

Business Results

- Shorter intake process for more efficient use of clients' time
- Ability to serve more clients
- Increased employee productivity

Profiles

- Vice President of Rehabilitation Services
- Technology Consultant

Disabilities and injuries make life more challenging. The Tommy Nobis Center helps people from all walks of life overcome those challenges and enter or return to the work force. A high school student with a developmental disability may come to the center for assistance in making the transition to a job in a grocery store. A recently discharged U.S. veteran may be referred to the center for counseling and computer training.

The center's hard-working rehabilitation services staff strives to serve as many clients as possible, but the organization's previous lack of automation hampered efficiency. Of particular concern was the center's intake process, which had been the same for as long as anyone could remember. “While the process worked, it did so at a snail's pace,” says Becky Ketts, Rehabilitation Services Manager for the Tommy Nobis Center.

Barriers to Begin Training

The center's one intake coordinator works part-time, collecting the information necessary for clients to enroll in one or more of the 13 programs that the center offers, which include everything from forklift certification to social-adjustment training. In the past, the process of getting a new client into the center's programs required filling out between 25 and 30 tax, payroll, and other forms—largely with the same information. “It was name, address, phone number ... name, address, phone number,” says Peggy Withrow, Vice President of Rehabilitation Services for the Tommy Nobis Center.

On average, the intake process lasted several hours for each client, who often eyed the stack of paperwork with trepidation. Most clients are referred to the Tommy Nobis Center through the Georgia Department of Labor Vocational Rehabilitation Program, U.S. Department of Veterans Affairs, workers' compensation insurance companies, area schools, or other rehabilitation providers. “Many clients already are frustrated by the time they walk in our door because they've had to endure long delays and paper-heavy bureaucratic processes to get to this point,” says Ketts. “We didn't want to contribute to that frustration any longer.”

Clients weren't the only ones aggravated by the laborious manual processes. The center was concerned about the inefficient use of employee time and the risk of data inaccuracy, considering the sheer number of forms whose handwritten information had to be typed into numerous other forms. Says Withrow, “We not only wanted to make better use of our intake coordinator's time, but also diminish the opportunity for mistakes that came from dealing with the same information in so many forms.”

The intake coordinator was not the only one at Tommy Nobis who used the forms.

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Peggy Withrow, Vice President of Rehabilitation Services,
Tommy Nobis Center

Multiple people in several departments, such as payroll and human resources, needed copies at some point during a client’s rehabilitation. Each client’s file often was handled by more than one staffer, and the center’s various program managers needed all the completed paperwork for each client enrolled in one of their programs. The intake coordinator had to hunt down those program managers to give them copies of the paperwork and get the training process started. “Having so many people who needed to touch each client’s file made coordination among staffers really challenging and could ultimately delay a client’s return to work,” says Withrow.

The Wish List

The Tommy Nobis Center wanted to ease client and employee pains, capture information more efficiently, and improve access to that information. Employees had identified the need for change and had an idea of what they wanted but lacked the funds and expertise to take on the issues. “Like many nonprofit agencies, we put this project on our long-term wish list,” says Ketts.

In early 2009, however, the center took action and applied for an annual prize awarded by TechBridge, a nonprofit IT provider for nonprofit organizations. The TechBridge award package included help with planning and implementing a technology-supported program along with funding for software and miscellaneous expenses. “We couldn’t believe it when we won—there were 80 nonprofit organizations entered,” says Karen Carlisle, Vice President of Corporate Communications and Development for the Tommy Nobis Center.

Technology Choices

The center received the award in May 2009 and began to look at potential document management solutions. It initially considered implementing a system that had been designed to meet the specific needs of nonprofit community rehabilitation programs, but the center determined that the product was too limited and expensive to meet its long-term needs. In September 2009, to help the center evaluate another option, TechBridge brought in Computer Technology Solutions (CTS), an IT service partner, to introduce the center’s employees to Microsoft Office SharePoint Server 2007 and its portal, workflow, business process, business intelligence, and collaboration capabilities.

After seeing the software in action, the center decided to pursue a solution built on Office SharePoint Server 2007 to provide document management and collaboration functionality. “Once we were introduced to Office SharePoint Server 2007, we felt that its customizability alone made it a better way to go,” recalls Withrow. “Plus, we already use Microsoft Office products, so it made sense to give our users something that was familiar and intuitive.” The solution design also included a customer relationship management application to serve as the user interface for data entry, case management, and client data tracking.

Easy Setup, Eager Users

After identifying all the business requirements for the initial solution implementation, CTS Consultant Ron Jones led the effort to develop the necessary forms, tasks, and workflow aspects for the center’s new intake process. He and his team deployed Office SharePoint Server 2007 on a donated server computer. “The setup was pretty easy,” says Jones. “We got the hardware up and running in less than a day and spent a little more than a day to configure the server, set up the accounts, and create site

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Becky Ketts, Rehabilitation Services
Manager, Tommy Nobis Center

collections. We completed the whole setup over a weekend.” (A site collection is a top-level Web site and all its subsites.)

Jones was more concerned about training. “It’s a paradigm shift to go from storing documents on shared drives and desktops to storing them in libraries,” says Jones. Yet although learning new things can be daunting, the staff showed no reluctance when it came to changing practices to make the most of the new solution. To avoid having to take time away from serving clients, Tommy Nobis Center employees came in on a Saturday in January 2010 to participate in a training session.

“We have a group of very bright rehabilitation professionals who could see the solution’s potential,” says Withrow. “Even though they’re not technical, their response was, ‘Bring it on!’ In fact, we had employees get impatient during the testing phase because they’d been introduced to the system’s capabilities during the training session and wanted to start using it immediately.”

A New Way to Work

And use it they did. “Fortunately, the Office SharePoint Server 2007–based solution is so highly intuitive that employees had no trouble jumping right in,” says Ketts. “The very first time our intake coordinator used the new intake process, the client had no idea that he was the first to be entered in the system. That says a lot for a new technology solution.”

Today, when new clients walk in the door at the Tommy Nobis Center, the verbal greeting is about the only part of the intake process that’s the same as before. Clients sit down with the intake coordinator, who enters their information once in an electronic form. The system then uses that data to populate all the other necessary forms, which the coordinator prints for the client to sign. In addition, as soon as the coordinator assigns a new client to a particular program, the system automatically alerts that program’s manager that a new client is ready to start and supplies the manager with the client’s information. The process that previously took several hours now takes just one.

The center has compressed its average time for when a client enters the center initially to when he or she starts a training program from as much as four weeks to only one week. Says Ketts, “Our coordinator has accelerated from handling two to three clients per week to seeing four or five. Processing more people each week cuts down the waiting time just to get into the center, and it reduces the time between completing intake and starting a program. If you are the person with a disability waiting your turn to get into programs at Tommy Nobis Center, this is of paramount importance.”

The time savings should help the center achieve its goal of increasing the number of clients that it assists by 10 percent per year. In fact, the center is on track to serve at least 1,000 people by the end of its fiscal year in June 2010, which is an increase from the 895 clients that it served in fiscal year 2009.

“Our intake numbers have already gone up by more than 15 percent—and we’ve only used the solution since February,” says Withrow. “We’re able to reallocate our time and shift from the paper to the people. With more time to devote to counseling and other support for our clients, we’ll have more program completers. In the future, we’ll see

even more improvements, such as better data for reporting and evaluation, which leads to improved service delivery.”

Concludes Withrow, “There’s a certain level of motivation that a client brings to the first visit. We don’t want to dampen that—we want to capitalize on it. Using technology to shorten the intake process lets us hit the prime opportunity to help clients on the road to productivity.”

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Vice President of Rehabilitation Services Profile

Tracking Outcomes to Further Center's Successes



Peggy Withrow
Vice President of Rehabilitation
Services
Tommy Nobis Center

Peggy Withrow has worked for the Tommy Nobis Center for 17 years and manages the rehabilitation team. She graduated summa cum laude from Mars Hill College with a degree in education and has served as a surveyor for the Commission on Accreditation of Rehabilitation Facilities. Withrow enjoys spending her free time with family and friends, particularly if it involves boating and relaxing at her cabin retreat in the North Carolina mountains.

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Peggy Withrow not only oversees the day-to-day progress of clients in Tommy Nobis Center programs but also is responsible for ensuring that the center has the information that it needs to maintain accreditation, produce grant proposals, and develop annual reports. Pulling together that business intelligence hasn't always been easy.

Curing Data-Collection Headaches

In the past, Tommy Nobis program managers and executives manually compiled the same information into many different reports. For example, program managers had to put together both monthly and quarterly reports for their individual programs. Withrow and her colleagues took information from those reports as well as others and manually added it to their own organizationwide reports and proposals. Doing so meant a whole lot of running around to request data from individuals—an exceedingly time-consuming practice.

Now, with the automatic data tracking and reporting that's made possible with the center's new solution based on Microsoft Office SharePoint Server 2007, employees can run a custom report anytime. Withrow used to spend half of her time gathering data from numerous spreadsheets and compiling reports. The new reporting capabilities automatically aggregate information from disparate sources and make it available in just a few mouse clicks. "Having a streamlined, automated reporting process is so wonderful—it makes us want to weep," laughs Withrow. "Now I can look at my computer and see right away how many clients are enrolled in and successfully completing a particular training course without having to talk to the instructor or wait for the program manager's report."

Quantity and Quality of Information

The time savings aren't the only benefit; Withrow now has more reliable, comprehensive information on which to draw. By using new workflow-enabled reporting processes, Withrow can evaluate the

center's services and determine which programs are working, which should be changed or replaced, and what clients and stakeholders are getting from the services—all of which helps her set a more informed strategic course for the center. "Analyzing lots of statistics in different ways lets me better evaluate particular services, program locations, and so on," says Withrow. "Access to comprehensive, up-to-date information like this means I can make more timely decisions."

And Withrow can share that information with the agencies that need it. "Outcomes are extremely important for most non-profits, and we're no different," she says. "We aim to track the long-term effectiveness of our services, not just the basics like client demographics. Accurate, detailed information acts as a good barometer for our funding agencies. It's great to be able to quickly and easily generate reports that show those agencies that people are getting jobs as a result of our services."

Future plans call for the creation of a reporting dashboard to make it even easier for Tommy Nobis Center managers to see their programs' status. The center's chief executive officer would like to be able to get real-time status information at a glance, such as how many clients the center served in the last 30 days. "We already see the value of Office SharePoint Server 2007 with the new intake solution and our improved business intelligence capabilities, and we consider those only the beginning of what we'll be able to do with the software," says Withrow.

Business Results

- *Increased employee productivity:* Employees no longer need to manually collect data to contribute to reports.
- *Better business intelligence:* Executives have access to more complete information on which to base business decisions.
- *Easier information sharing:* The center can get the right information to funding agencies to demonstrate success.

Technology Consultant Profile

Envisioning Big Things in Nonprofit's Future



Ron Jones
Consultant
Computer Technology Solutions (CTS)

When he's not working full-time as a CTS consultant or volunteering for the Tommy Nobis Center, Ron Jones devotes hours to college football. He's an active member of SharePoint-related community groups and has spoken at several SharePoint conferences around the United States. A Junior Patron at the High Museum of Art in Atlanta, Jones also enjoys Thai boxing and playing Scrabble.

"They do important work at the Tommy Nobis Center. I hope my help enables them to do it even more effectively so that they can make a difference to even more lives."

The Tommy Nobis Center has no dedicated internal IT staff. Instead, it relies on the know-how of talented consultants from CTS and other organizations. Ever since launching the center's intake and reporting solution, Ron Jones has volunteered his time to keep things up and running. "In terms of ongoing system management so far, the Microsoft Office SharePoint Server 2007 system has been running beautifully and requires almost no time from me," says Jones.

An Idea Man

Jones also works with the center to educate its decision makers about the possibilities available with their new solution. He inspires them with ideas of how they can extend it for even greater functionality, not just in the Rehabilitation Services department but across the entire center. "There's so much that the center can do with Office SharePoint Server 2007," says Jones. "I'm showing managers that an intranet portal, a forum for collaboration, improved document management, and so on are all possible and fully within their reach."

Jones sees multiple ways in which the Tommy Nobis Center can make the most of its new solution and plans to help along the way. "The center could modify the existing automated intake functionality to handle workflow management for its training initiatives and class offerings, as well as the tracking and documentation associated with job placement following a client's completion of his or her programs," says Jones. "I know that the center wants to monitor clients' success after they enter the work force and also provide follow-up support to help keep those clients in their jobs. I think that the center will soon be able to use Office SharePoint Server 2007 to do all that and more."

The center's plans also include tracking client trends—such as which jobs best suit clients with certain conditions—and further

improving its compliance-related data gathering and reporting.

Empowered Users

Jones believes that an intranet portal will help the Tommy Nobis Center staff increase efficiency, especially considering how many people work part-time and are therefore not always available to answer questions. "There's a lot of individual knowledge that the staff taps into, and it would be great to proactively share that knowledge," says Jones. "An intranet portal based on the Office SharePoint Server 2007 technology that the center already has will really help make the entire work force at Tommy Nobis more informed and better able to make quick decisions."

Jones intends to keep volunteering his time and skills at the Tommy Nobis Center because it's an organization that he believes is important to the fabric of the greater Atlanta community. And others agree. In fact, Jones received a commendation from the mayor of Sandy Springs, an Atlanta suburb and home to TechBridge, for his extensive, ongoing volunteer efforts on behalf of the center and its clients. "They do important work at the Tommy Nobis Center," comments Jones. "I hope my help enables them to do it even more effectively so that they can make a difference to even more lives."

Business Results

- *Easy system management:* Jones needs to spend minimal time on maintenance of the Office SharePoint Server 2007 solution.
- *Opportunities to add value:* The center can extend its use of the solution for even greater employee productivity and to provide greater support for clients.

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