

Volunteers of America Southeast Mobile, Alabama



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Introduction

[Volunteers of America Southeast \(VOASE\)](#) has been serving communities across Mississippi, Alabama, and Georgia for four decades. In addition to providing programs for intellectual and developmental disabilities, the organization also serves veterans, low-income seniors, children and youth, homeless, and people with addictive diseases and mental illness.

After receiving funding to expand their Supportive Services for Veteran Families (SSVF) program into Alabama, VOASE began the search for a web-based client management system to replace their reliance on paper files and spreadsheets.

Improving Efficiency and Sustainability with Penelope

In 2019, VOASE selected [Penelope](#) to help reduce their paper usage and also to provide them with a better way to track client files in a configurable database that could also automate key workflows and processes.

As Chad Cheshire, VOASE’s Director of Homelessness and Prevention Services explained during a recent [webinar](#), Penelope was chosen for its flexibility and configurability, as well as the ability for VOASE to assume ownership of a scalable system that could manage the administrative side of operations as well. **Being able to customize forms to meet shifting funder requirements was also a must-have.**

“We wanted to be able to adapt to that as needed and really have the ability for the system to do what we need it to do,” he said.

Saving Time with Workflow Automation

Perhaps most important of all for VOASE’s work was being able to use a system with configurable workflow automation, task management, and time-based action triggers.



VOASE now uses Penelope to automate previously manual processes such as coordinating new client intakes and case manager assignment across multiple locations, check requests, exit workflows and paperwork, and issuing important reminders for 90-day recertifications.

Setting up automated workflows and action triggers means investing time during the implementation of Penelope, but the return on that investment is high, said Cheshire, as it allows staff to focus on their work while the necessary flow of information occurs automatically in the background.

“Once you get them built, **the system works on its own** moving forward,” he said.

Benefits of Penelope

- Intake time **cut in half**
- Reporting time reduced from full day to **15 minutes**
- **No longer need to use spreadsheets** for data tracking

Easier Intakes and Reporting

Prior to using Penelope, VOASE was using a spreadsheet to track time from first contact with a client to their enrollment in service. Now, however, Penelope does that work via the Pre-Enrollment/Waitlist functionality, which provides greater visibility into who’s waiting and why, as well as built-in reports that show the average number of days from first contact to program enrollment across a given program or the whole organization.

“Our intake time was cut dramatically,” said Cheshire, adding that, previously, the time from intake to enrollment was averaging around six or seven days. “Now, because of Penelope, it streamlines the process and **the time to do an enrollment is cut probably in half**, but also the number of days it takes to enroll someone into the program is cut.”

Penelope is also now tracking all of VOASE’s outreach programs, referrals, and meetings.

“**We went from five spreadsheets down to zero**,” said Cheshire.



Another benefit of using Penelope has been that it's freed up time to allow the organization to apply for and secure new grants for other programs. For example, pulling demographic and outcomes data from Penelope and its Tableau add-on module to apply for and secure grants took around "15 minutes," Cheshire said, adding that it's also proved a time-saver when compiling reports for the board.

"It used to take a day to find all that data in the spreadsheets and compile the report to send to my senior leadership, and **now I can just run two reports in Penelope and there's my data,**" he said.

Using Penelope to Navigate COVID



Penelope has also provided cost savings during COVID, as staff are able to work remotely and the organization can use Penelope's electronic signature functionality to eliminate costly traveling between locations to obtain signatures.

VOASE also plans to use Penelope's Engage feature to obtain electronic signatures from clients remotely and securely.

"Penelope has add-ons that allow you to send forms to clients for signatures and they can send it back, and it's all done through the system," he said. "The ability to do that work in the system itself so we can stay in compliance with the VA is a great benefit."

Changing from using paper to an electronic system like Penelope can be a tricky exercise in change management but, once the initial setup and implementation of the system was complete, Cheshire said his staff have bought in completely.

"Every single one of my staff have admitted that this is the way to go," he said. "It's better than what we were doing and **it makes their jobs so much easier.**"

If your organization is looking to improve efficiency, ease reporting, and save time for staff, contact us to schedule a complimentary consultation with a Penelope expert.

