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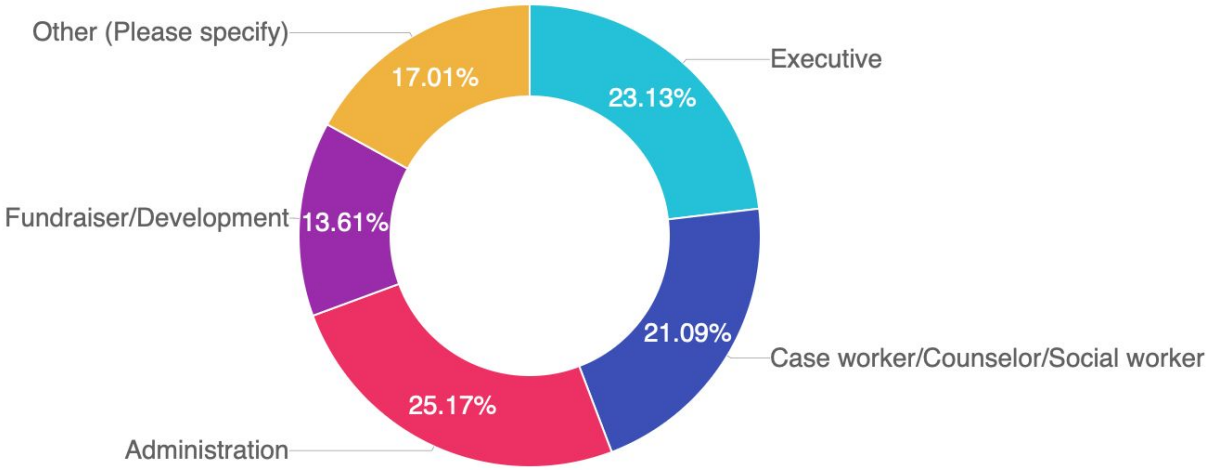
Do More Good.



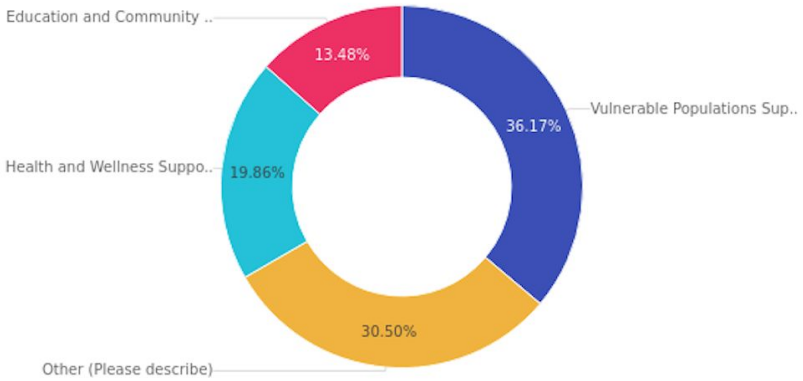
Sumac Case Management Survey Insights

August 2024

Q1 What is your role in your organization?



Q2 Which of the following best describes the work of your organization?

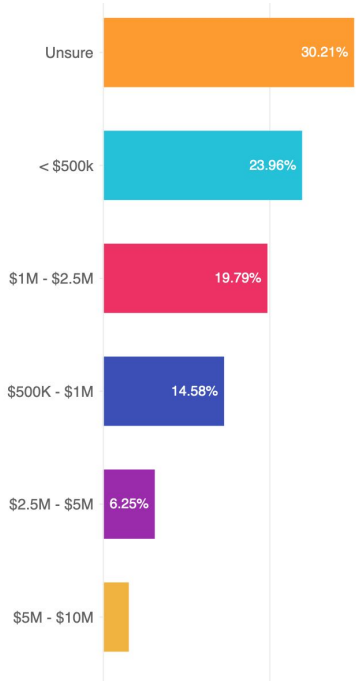


- **Vulnerable Populations Support Services:** We serve the homeless, at-risk youth, families in crisis, or similar
- **Health and Wellness Support Services:** We provide chronic condition management, mental health support, and/or rehabilitation services
- **Education and Community Development:** We offer educational programs, skill development, vocational training, and/or community engagement

Key Insights

- This was our first time using these descriptions
- Many of the “other” entries could be categorized into our categories except for the “Art” entries. There were also many who identified themselves as “all three”
- We might have to tweak our categories to accommodate orgs that focus on: religious activity, animal welfare, advocacy (which were mentioned often)

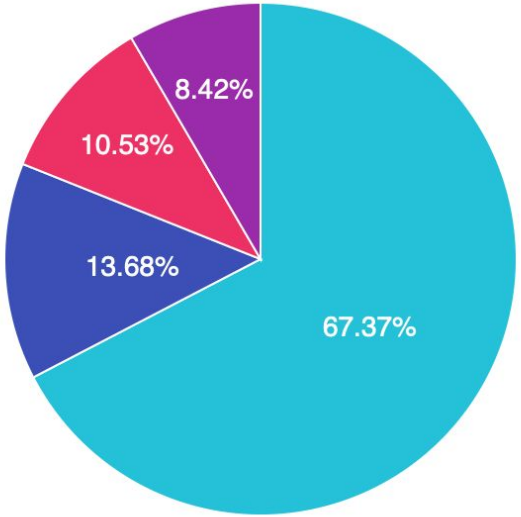
Q4 What is your organization's operating budget?



Key Insights

- Majority of our clients are small

Q5 Does your organization solicit donations?

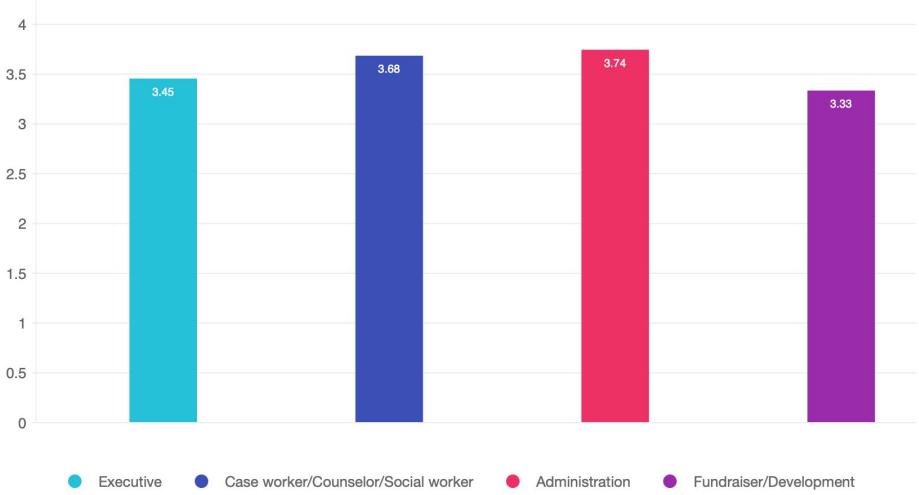


- Yes, donations or gifts to our organization are an integral part of how we provide our services
- Yes, but donations or gifts to our organization are not actively solicited (i.e., we do not actively fundraise)
- No, we do not solicit donations because we have other funding sources (e.g., grants or government support)
- Unsure

Key Insights

- Donations are a key part of the majority of our case management client funding strategies
- More than 80% collect donations, but as you'll see in Q.13 only 35% use Sumac to process donations, and only 18% use donation webforms

Q15 On a scale of 1-5, how well does Sumac meet your needs as an organization?

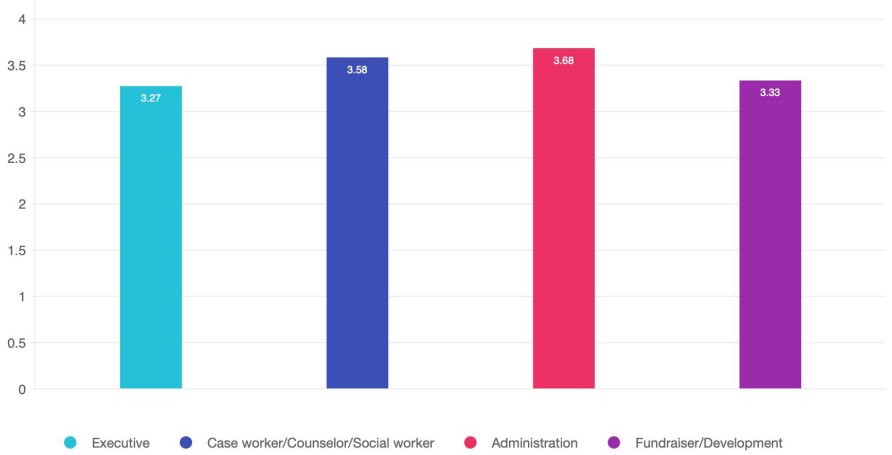


Rating	Response percent	Response count
1 (Doesn't meet our needs at all)	0.00%	0
2	4.65%	4
3	48.84%	42
4	37.21%	32
5 (Totally meets our needs)	9.30%	8

Key Insights

- Similar ratings across roles with Administrators being our happiest and Fundraisers being our least happiest user type
- More customers selected the high end of the scale (positives = 40) than the low end (negatives = 4); and the majority selected right in the middle (neutral = 42), which equals moderate happiness

Q17 On a scale of 1-5, how well does Sumac's reporting capabilities meet your needs?



Rating	Response percent	Response count
1 (Not at all)	1.16%	1
2	9.30%	8
3	47.67%	41
4	33.72%	29
5 (Very well)	8.14%	7
Are any reports you need missing? 15 responses		15

Key Insights

- **Customization and Flexibility:** Users want the ability to create and save custom reports, as many find the preset options unhelpful for their specific organizational needs
- **Comparative Reporting:** There is a demand for better tools to compare data across specific campaigns and time periods, particularly for tracking donor activity over multiple years. Current options require manual data manipulation
- **Search and Filtering Challenges:** The search builder is seen as complex and difficult to use, especially for organizations with intricate structures. Users also want the ability to conduct multiple searches simultaneously and add more fields for detailed reports
- **Ease of Use and Training:** Many users find report creation time-consuming and non-intuitive, suggesting a need for better training or a more user-friendly interface. Some respondents also highlighted a lack of time for necessary training
- **Data Integration:** Issues were noted with running reports that require data from multiple report types, necessitating manual data adjustments
- **Specific Missing Reports:** A few users noted specific missing reports, such as revenue-to-target reports and those required for funder reporting

Q3 Please describe the full process of a typical client entering, receiving services, and exiting your organization

Client Intake and Assessment are Frequent First Steps: Many respondents across various roles describe an initial process involving client intake, assessment, and determining needs:

- "Client would fill out a registration form... and then list what services they are interested in..." (Response 2)
- "A client will go through our intake form and sign up for a program that interests or best suits them." (Response 4)
- "We conduct an intake and transfer our notes to a new contact in sumac." (Response 22)
- "Clients are usually referred by school, rcmp, hospital, or other agencies. They complete an intake and consent for counselling." (Response 80)

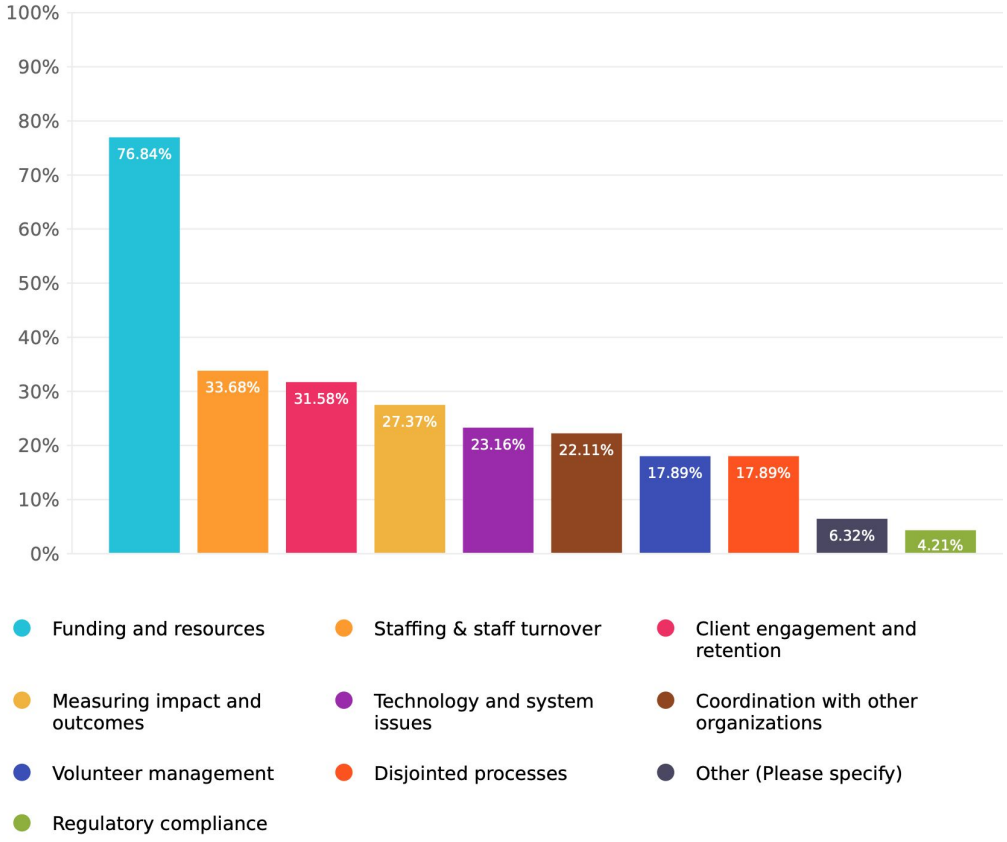
Tailoring Services to Individual Client Needs is Crucial: Several respondents emphasize the importance of understanding and addressing the unique needs of each client:

- "The services provided are catered to the needs of the client." (Response 6)
- "Case manager work with client to get their Nursing Registration in Ontario, by offering counselling, help with passing exams, help with filling Gaps" (Response 19)
- "We fundraise for a Hospice so the database is used to track donors and donations." (Response 33) - Even in a fundraising context, the focus is on aligning with specific needs.

Providing Ongoing Support and Follow-up is Common: Many organizations highlight continuous engagement with clients beyond the initial service point:

- "The client will continue to be notified of upcoming programs and events to stay engaged with the organization." (Response 4)
- "They come and go as they please, no case plans specifically." (Response 51) - Even with open access, there is an element of ongoing engagement.
- "Clients do not exit but often join our mailing list and become potential honorees or donors for other programs at our foundation." (Response 23)

Q6 What are the most significant challenges your organization faces in delivering services to your clients?

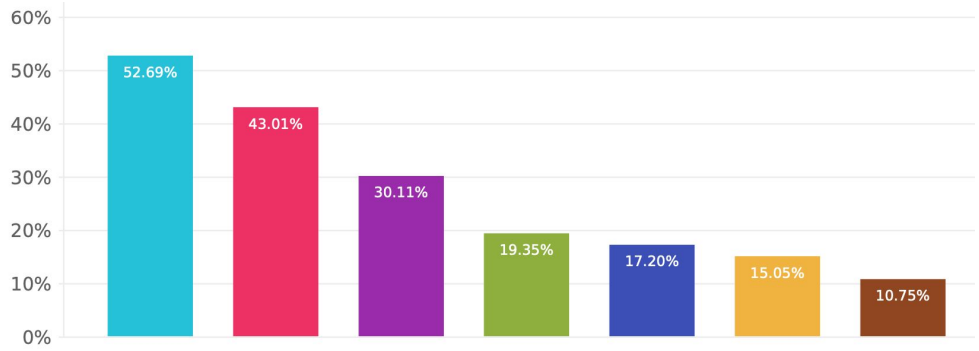




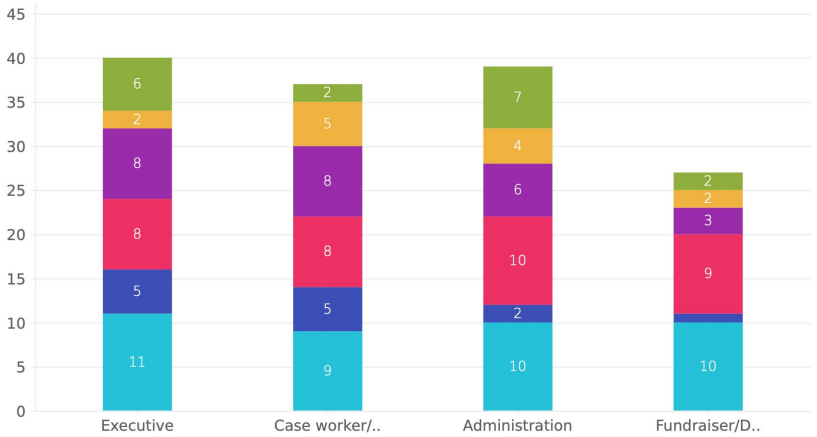
Key Insights

- Funding is the greatest challenge
- Client engagement and retention is a challenge that should be explored more

Q7 Which parts of your organization's daily workflow consumes the most time or is the most frustrating to manage?



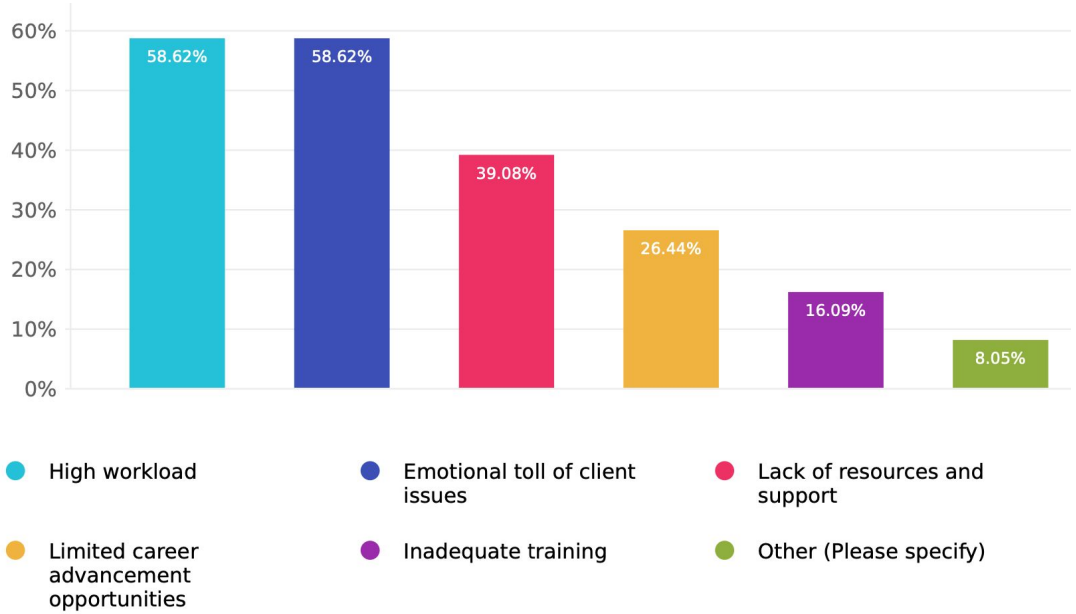
- Client data entry and management
- Reporting and documentation
- Communication with clients
- Managing staff and volunteers
- Scheduling and appointment management
- Coordination with other organizations
- Other (Please specify)

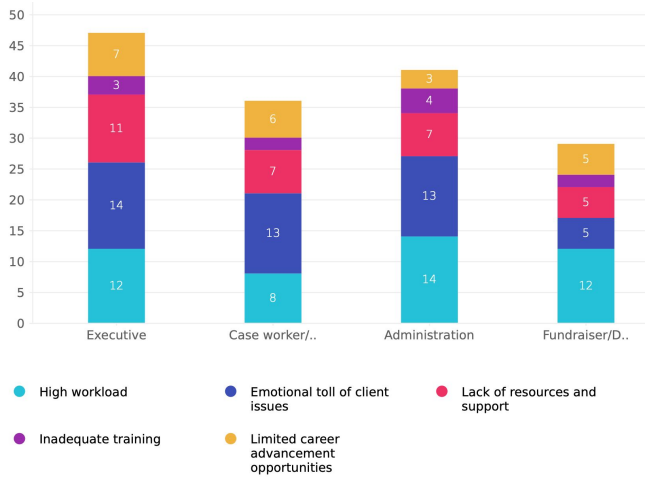


Key Insights

- Data entry and reporting are major timesinks

Q12 What are the primary stressors or challenges that impact the wellbeing and performance of your organization's staff?

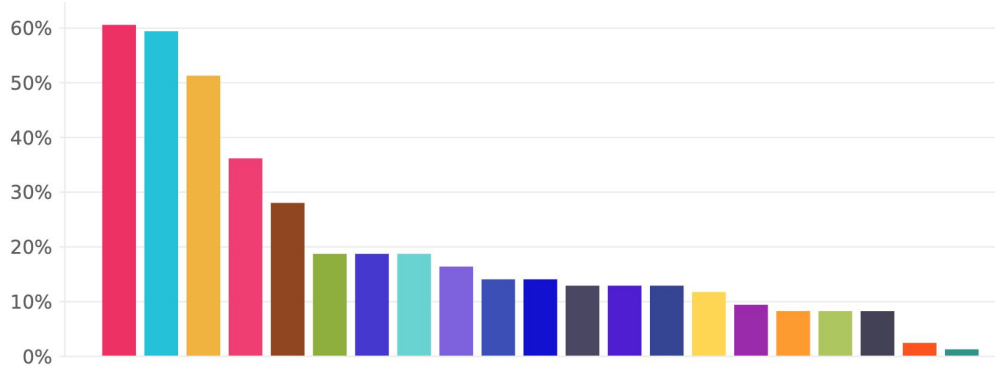




Key Insights

- A good reminder that our clients' work takes a huge emotional toll on them; we should be sensitive to that in all our interactions

Q13 What features/functionality does your organization use in Sumac?



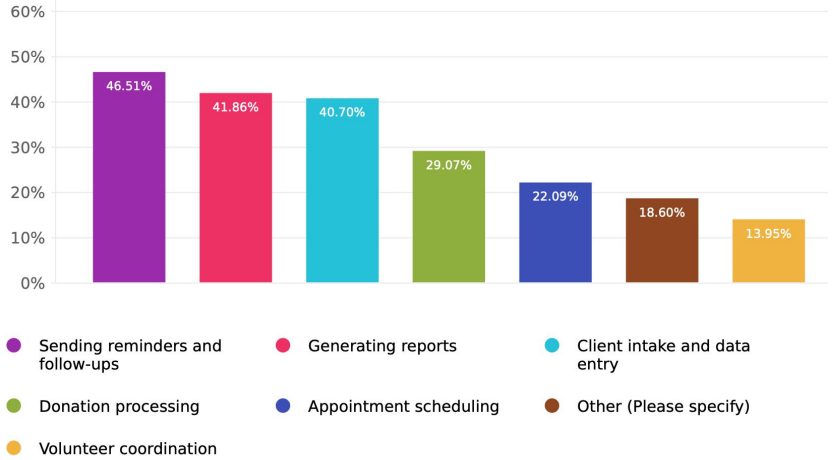
- Case notes
- Client intake
- Reporting
- Donation processing
- Case plans
- Workflows/reminders
- Online donations
- Membership management
- Online case portal
- Client intake using webforms
- Volunteer management
- Referrals
- Event management
- Other (Please specify)
- Email marketing
- Meeting scheduling
- Waitlist management
- Grant management
- Service and program delivery
- Helpline management
- PPS scoring

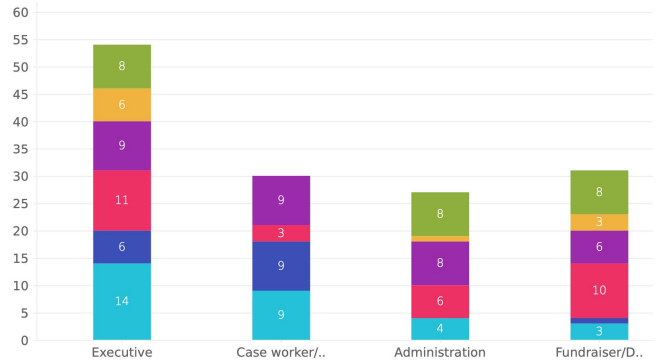


Key Insights

- The top 5 features were selected more times than the remaining 16 combined.
- While more than 80% of our clients collect donations, only 35% use Sumac to process donations, and only 18% use donation webforms
- 59% of clients use Sumac for client intake, but only 14% use our client intake webforms

Q16 Are there repetitive tasks or processes that you believe could be automated or simplified in Sumac to make your job easier?

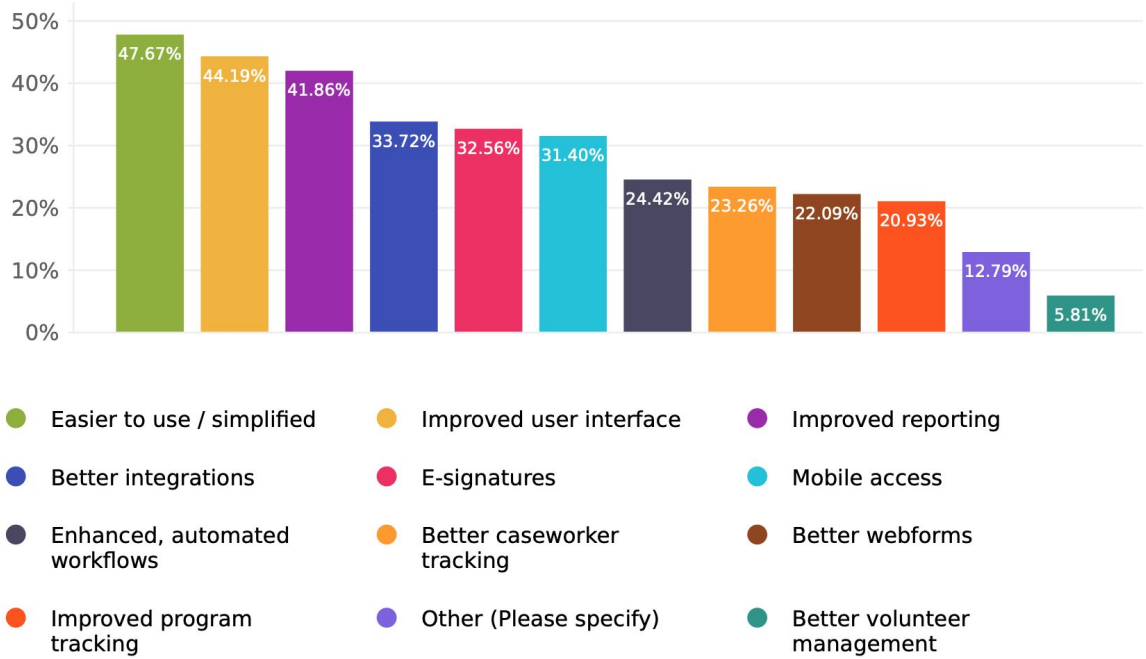


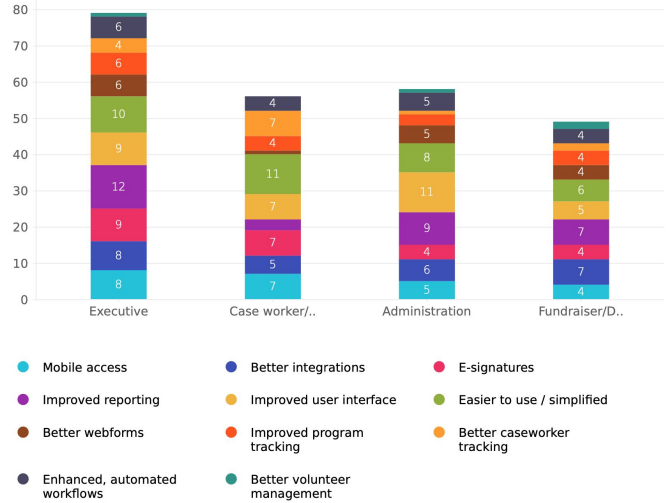


Key Insights

- **Automation and Importing**: Users wish for more automation in Sumac and find the importing process limited by only allowing txt or csv files
- **Campaign-specific Data Extraction**: Difficulty in pulling donation information specific to a campaign without needing to create and match multiple lists
- **Report and List Building**: Need for more detailed reports and list-building tools to avoid pulling multiple reports and condensing data manually
- **Customizable Intake Forms**: Users want more customizable fields in the intake form
- **Duplicate Donors**: Issues with duplicate donor entries when moving online, particularly due to formatting differences (e.g., dashes)
- **Fee Recording**: Difficulty in recording donation fees in Sumac, requiring users to refer back to multiple sources for accurate accounting
- **Case Note Flexibility**: Desire for the ability to select multiple service types under a single case note
- **Client Number Search**: Need for the ability to search using client numbers
- **Printing Process**: The printing process is seen as complex and time-consuming

Q18 What types of improvements would you like to see in Sumac?





Key Insights

- Better UI & UX are at the top of our users' wish list: Our users want Sumac to be easier to use and to have an improved user interface
- Executives and fundraisers are looking for more integrations
- Executives have the longest request list
- Low interest in volunteer improvements/changes

Q14 What other software does your organization use in addition to Sumac? For example: software for donations, email marketing, volunteer management, etc.

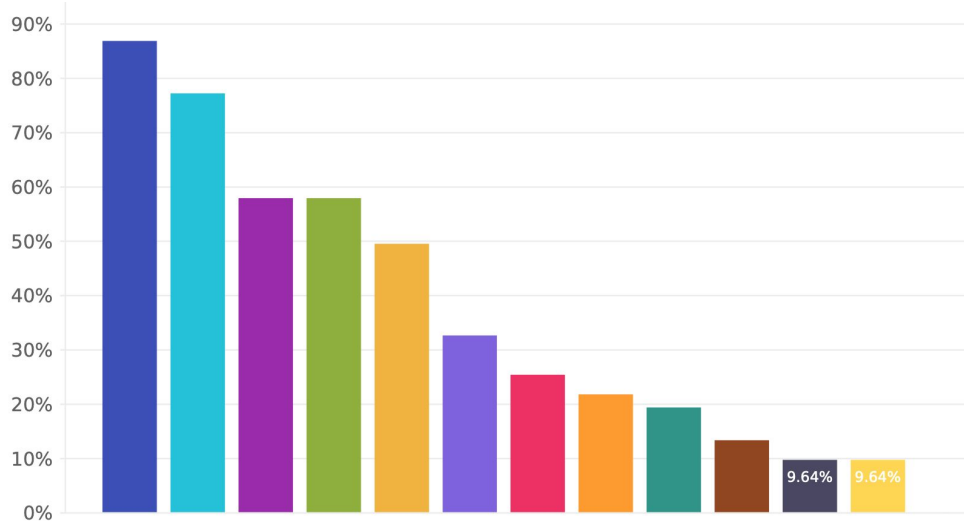
The most commonly listed software platforms based on the responses provided are:

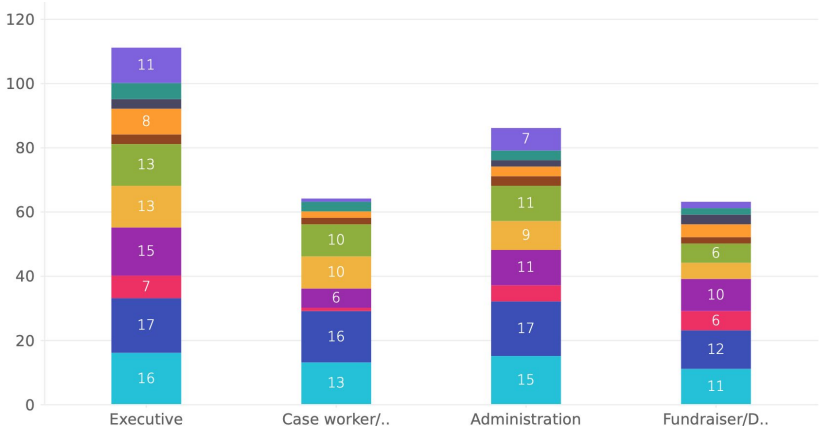
1. **Mailchimp** - Mentioned by multiple respondents as their email marketing platform
2. **Constant Contact** - Also frequently cited for email marketing
3. **QuickBooks** - Commonly used for financial management
4. **Asana** - Used for managing Case workflows
5. **Microsoft 365** - Often listed for various organizational tasks
6. **Google Suite** (Google Docs, Google Sheets, Gmail, Google Drive) - Frequently used for document management, communication, and collaboration
7. **CanadaHelps** - Noted several times as a platform for donation management
8. **Zeffy** - Mentioned as a donation platform by a few respondents

Q19 How would you describe the *perfect* case management solution? What would it look like? What would it do really well?

- **Ease of Use and User Interface:** Many respondents emphasize the importance of a system that is simple, intuitive, and easy to navigate, even for those with varying levels of tech proficiency. This includes user-friendly interfaces and seamless workflows
- **Integration and Automation:** Several respondents highlight the need for better integration with other tools (e.g., email, calendar, voice recording software) and automation features. Desired functionalities include automated reminders, automatic data entry from client forms, and workflow automation
- **Customization:** There is a strong demand for customizable features that allow organizations to tailor the system to their specific needs, including customizable reports, data fields, and workflows
- **Reporting and Data Management:** Respondents want robust reporting capabilities that are easy to use and generate accurate, customizable reports. Some mention the need for real-time data entry and analysis tools
- **Additional Features:** Some respondents suggest additional functionalities such as billing processes, HIPAA compliance, mobile accessibility, and the ability to track client progress visually

Q22 Where do you look for information to help your organization?





Key Insights

- Our marketing efforts in SEO are well-placed
- We need to utilize the following more:
  - Nonprofit publications
  - Consultants
  - Conferences
  - Newsletters

Q20 What is the biggest source of stress for you in your job right now?

In order of most mentioned:

1. **Lack of Time:** Many respondents struggle with insufficient time to complete tasks and manage workloads effectively
2. **Funding:** Securing adequate funding and managing fundraising efforts are significant stressors for many respondents
3. **Emotional/Mental Toll from Clients:** The emotional impact of working with clients, including vicarious trauma, is a major source of stress
4. **Issues with Sumac Software:** Difficulties with learning, using, and waiting on the Sumac software contribute to stress
5. **Manual Data Entry and Data Management:** Manually entering data and ensuring its accuracy while trying to reduce redundancies is a common stressor
6. **Workload/Uneven Workload:** Respondents often feel overwhelmed by a high or uneven workload
7. **Staffing Issues:** Staffing challenges, including turnover, training, and resource shortages, create significant stress
8. **Reporting and Analysis:** Running reports and ensuring accurate analysis for grants and other needs is stressful for many respondents
9. **Organizational/Administrative Issues:** Organizational challenges, including unclear procedures and administrative burdens, add to the stress

Q21 What's the most important goal you want to achieve in your job this year?

In order of most mentioned:

1. **Funding and Financial Stability:** Many respondents are focused on securing more recurrent funding, increasing financial stability, and developing fundraising strategies. This reflects a strong emphasis on ensuring the organization's financial health
2. **Client and Community Services:** A significant number of respondents prioritize improving the quality of client services, increasing the number of clients served, and better meeting the needs of the community. This highlights the importance placed on direct service provision
3. **Efficiency and Process Improvement:** There is a clear desire to streamline processes, reduce manual data entry, and create better systems for data collection, reporting, and overall workflow. This includes goals like simplifying receipting processes and digitizing client management
4. **Team and Volunteer Management:** Some respondents aim to hire more staff, improve team morale, and enhance volunteer processes, indicating a focus on internal organizational development
5. **Personal and Professional Growth:** A few respondents mentioned goals related to their personal development, such as continuing education, achieving work-life balance, and advancing to supervisory roles

Takeaways

- **Generally positive, but with room for improvement:** All user groups, including executives, case workers, administrators, and fundraisers, generally agree that Sumac is a valuable tool for their organization (Q15, overall 3.51/5). However, there's a strong desire for specific enhancements to improve efficiency and usability
- **Universal need for increased automation and streamlined workflows:** This sentiment resonates across all groups. Users desire automated features for reminders (Q16), reporting (Q16), donation processing (Q16), and client intake (Q16). These requests point to a need for reducing manual data entry and repetitive tasks
- **Widespread frustration with reporting capabilities:** Although Sumac provides good reporting functionality, users across all groups expressed a need for more customization, clearer reports, and an easier to use interface (Q17, Q18, Q19). This suggests a desire for greater flexibility in extracting and analyzing data to meet diverse reporting needs
- **Consistent challenges in coordinating with external organizations:** All groups highlight the difficulties stemming from different systems, inconsistent follow-ups, and limitations in sharing client information securely (Q8). This underscores the need for improved interoperability and standardized communication protocols
- **Funding and staffing limitations create significant stress:** Across all groups, securing funding (Q6) and managing staff workload are identified as primary sources of stress (Q12). This points to a common challenge in resource allocation and capacity building across nonprofit organizations
- **The majority of clients only use a fraction of what we offer:** Case notes, client intake, reporting, donations, case plans (Q. 13); and there are some clear frustrations with some of those features.
- **The #1 ask of our clients is for better UI/UX:** User interface and user experience (ease of use) improvements were the top two requests for improvements to Sumac (Q.18) and mentioned repeatedly in responses to “describe the perfect Case Management solution” (Q.19)