



# The Computerworld Honors Program

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## Final Copy of Case Study

**Status:**

Laureate

**Year:**

2013

**Organization Name:**

Big Brothers Big Sisters Canada

**Organization URL:**

<http://www.bigbrothersbigsisters.ca/en/home/default.aspx>

**Project Name:**

Project Phoenix

**Please select the category in which you are submitting your entry:**

Human Services

**Please provide an overview of the nominated project. Describe the problem it was intended to solve, the technology or approach used, how it was innovative and any technical or other challenges that had to be overcome for successful implementation and adoption. (In 300 words or less.)**

Big Brothers Big Sisters Canada motto is "Every child deserves a mentor has a mentor." Therefore, every child that needs a mentor will have a mentor. In an effort to match the best mentor with a child in their program, Big Brothers Big Sisters used a hosted case management system called HOMES from a nonprofit organization called CORI. The system did not support the exact workflow processes that formed the core of Big Brothers Big Sisters program management. The HOMES system met their initial needs, but wasn't built in a manner that could be easily customized for future needs. Because the CORI system was generic, staff members spent extra time scrolling through extraneous questions and forms to select the fields that they needed. They wanted a system

tailored to their workflows, instead of one that required staff to interpret which pieces of functionality were applicable. A customized solution built to support Big Brothers Big Sisters' best practices would take interpretation out of using the software, and standardize and streamline how staff worked. It would also build better connections among their agencies. Additionally, BBBS in London, Ontario was looking at different ways to cut down on paper usage and be more aware of their environmental impact. Previously, they completed forms manually and printed a number of copies off, storing them in hard files. Having to continually check the status of cases in individual files made the enrollment of volunteers and children in the program a two-month process. They named their CRM implementation Project Phoenix. As they were starting from scratch they felt the name was symbolic because from the ashes would rise something far superior.

**When was this project implemented or last updated? (Please specify month and year.) Has it incorporated new technologies and/or other innovations since its initial deployment? (In 300 words or less.)**

The decision to implement CRM at Big Brothers Big Sisters Canada was made in May 2010. They moved to a test environment in October, piloted in November and December, and their deployment went live on December 16, 2010. BBBS London has also recently completed a new initiative in the fall of 2012 to provide on-going support for their mentors. They have worked with the National Training Committee and the Director of Training to create volunteer training modules the mentors can do online. For example, if a young person is faced with societal issues such as bullying or addiction, this program will give the mentors added support to help the young people develop resiliency behaviors. From a National perspective, team members collaborate with other member agencies across Canada on an on-going basis to see how they are able to achieve the best outcomes. Challenges are going to come up in everyone's life; however, how those challenges impact our life is very dependent on the individual. These new programs explore how mentors can ensure that the young people grow through those challenges in a very healthy way.

**Is implementation of the project complete? If no, please describe the project's phases and which phase the project is now in. (In 300 words or less.)**


The CRM project has been completed; however, BBBSC is continually seeing additional value that the software can provide to the program. They look forward to using their CRM solution for future projects including mobility, integrating with social media, donor tracking and tracking children who return to the program to mentor other children.

**Please provide at least one example of how the technology project has benefited a specific individual or organization. Feel free to include personal quotes from individuals who have directly benefited from the work. (In 300 words or less.)**

Currently BBBS of London & Area has over 300 active matches in their program. It costs approximately \$1,200 a year to recruit and screen mentors, and monitor, support, and supervise the matches to ensure their safe and healthy development. When looking at the long-term fiscal sustainability of the program, this puts a great deal of stress on the resources that are available. When BBBS of London & Area coordinates mentor recruitment campaigns, BBBS team members speak to the media, visit universities and colleges and companies to reach potential mentors. They also participate in the Kid Strong Summit to speak about the impact of mentoring and how young people can develop their own capacity to mentor and give back. By participating in these activities, they not only inspire young people within the BBBS organization, but also inspire the broader community in London to make a difference. An example of this inspiration is a young boy from the London community who had participated in BBBS' Bowl For Kids Sake fundraiser. The young boy didn't know much about BBBS at the time, so questioned his mother about it. He was moved to hear that there are young people who don't have friends or a home support system. With his 7th birthday coming up, he asked his friends to bring a donation in lieu of gifts. He raised \$400 and presented this donation to BBBS to help role models become good mentors. Also, BBBS is seeing the difference a flexible, user-friendly business solution can make to its operations. Their system has freed up time for staff to focus on what is most important: finding the right match for the thousands of youth across Canada waiting for mentors. They are also helping their counterpart in Australia to bring seven agencies onto CRM.

**Would this project be considered an innovation, a best practice or other notable advancement that could be adopted by or tailored for other organizations and uses? If yes, please describe that here. (In 300 words or less.)**

The organization is also using CRM to build interagency connections, share best practices, and improve program delivery. "I have created a Microsoft Dynamics CRM Online forum that is a monthly meeting for agencies to share experiences about how they are using the solution and how to improve it," says Malcolm McAuley, Dynamics System Manager. Using the new solution frees up time for Big Brothers Big Sisters employees at the agency level, allowing staff to spend time evaluating the needs of children and youth more thoroughly. "We are in a thousand different communities, representing a thousand different voices with something to contribute to making Big Brothers Big Sisters a better organization," concludes McAuley. "Microsoft Dynamics CRM Online is helping bring us all



together; that is its lasting value." To generate additional funding, BBBSC uses the information from CRM to support grant applications. This gives potential funders proof in hard numbers all the clients they've served, what they are doing to serve the children in the program and how they are working within the communities. This gives them a clear picture of how the grant funding will be spent and how it will help BBBSC achieve their goals to serve more children. They also look forward to using CRM to track the outcome of the program by seeing how many of their graduates return as volunteers and/or donors. This will allow them to be more informed on the success of their program and how it has impacted their communities. They will have the ability to stay in touch with children who have graduated from the program through Big Brothers Big Sisters Alumni program. By registering in the program, BBBSC will work to reunite mentors and mentees who have lost track of each other.

**If there are any other details that the judges should know about this project, please note them here. (In 300 words or less.)**

In 2012, Microsoft created a video with Big Brothers Big Sisters of Canada that was shown during opening ceremonies of Microsoft's Convergence. The video can be seen from this link: <http://www.microsoft.com/casestudies/Microsoft-Dynamics-CRM-2011/Big-Brothers-Big-Sisters-of-Canada/Online-Business-Solution-Helps-Service-Organization-Change-the-Lives-of-Youth/4000010880>