Dear Stakeholders,

I am delighted to present the Social Solutions 2020 Impact Report. Although this is our first such report, our company’s commitment to empowering the social good community with data and technology goes back more than two decades. Our 330 employees take great pride in the fact that our clients—nonprofit and government human services agencies as well as the case and social workers on the front line—have touched 27 million lives to date.

Our purpose as a company is “to empower communities to accelerate lasting social change.” To do this, we are focused on providing the industry’s best technology and data solutions to measure and impact social change, enabling communities to drive greater impact together and leading and advancing the ability to measure and optimize outcomes.

Everything we do at Social Solutions is driven by our conviction that data and technology are enablers of social change. To accelerate the pace of that change, we must provide our clients with the tools they need to make data-driven decisions, allocate resources effectively and enhance their results.

Beyond that, solving critical community challenges requires collective action. Our platform not only enables individual agencies to optimize their efforts; it also enables communities to come together to drive collective impact. When agencies can refer participants to one another, collaborate on collective care strategies and, most importantly, analyze the results together, transformative change happens.

Of course, the COVID-19 pandemic made 2020 a difficult year, especially for those already struggling. Our clients relied on Social Solutions more than ever to keep up with demand and fill gaps in the social safety net. Our technology also allowed them to quickly adapt to a highly virtual environment—in some cases, overnight. Through our crisis resilience offer, with funding uncertainty so prevalent, we offered our case management and outcomes measurement technology to qualified customers at no cost through the end of 2020. That gave them the opportunity to amplify their impact immediately without waiting for funding.

This report features data from our impact in 2020. It also highlights some of the ways in which the work we do benefits the thousands of social good organizations we work with and, most importantly, the people, families and communities they reach. We understand the value and importance of data-driven impact reporting, which is why we are also working to develop new ways to measure and assess the impact of our solutions and the progress against our purpose. There is much more to come.

My very best,

Erin Mulligan Nelson
Chief Executive Officer
June 2021

Our Mission

Provide the industry’s best technology and data solutions to accelerate social change.

Enable communities to drive greater impact together.

Lead and advance the ability to measure and optimize outcomes.

The Future of Social Good

The organizations we serve play a vital role in our communities. They are the frontline changemakers helping the most vulnerable people and working to solve the most intractable problems.

Demand has continued to grow—as it did even before the COVID-19 pandemic put unprecedented strain on individuals, families and communities—exceeding the capacity of these organizations to provide services to all those in need. This capacity gap cannot be sustained. Innovation is required. We believe that data and technology are the keys to unlocking scale and truly transformative social change.

When organizations have the right kind of case management technology, it reduces their administrative burden, allows them to track progress against key outcomes and informs the kind of data-driven stories that result in additional funding.

Organizations can then move out of their individual silos and work together to create a network of care that meets the needs of the whole person in a way that leads to lasting change.

Good data drives better decisions—and data’s potential to contribute to the economic and social development of local communities is clear. However, not all community-based organizations are equally able to harness the power of data to amplify the impact of their work. Barriers such as limited access, infrastructure and resources disproportionately affect smaller organizations.

That’s why we are creating a system that not only empowers individual organizations of all sizes to track, analyze and extract meaning from data, but also facilitates more coordinated, connected and data-driven social services to better meet communities’ needs. The future of social good is now.

34M
Americans—or 11% of the population—
live in poverty

1 in 4
families experienced
food insecurity in 2020

86%
of nonprofits say demand for their services
continues to rise

57%
of nonprofits say they
can’t meet the rising
demand for services
**Our Ecosystem**

- **Who We Serve**
  - Mission-driven, community-based organizations
  - 28% public sector organizations
  - 72% nonprofits

- **What Our Clients Do**
  - Meet critical community needs in the human services sectors
  - Adult Education
  - Child Services
  - Foundations
  - Health
  - Homelessness
  - Reentry Programs
  - Violence Survivors
  - Workforce

- **Where Our Clients Work**
  - 2.5K+ clients in all 50 U.S. states and five additional countries
  - Australia
  - Canada
  - Mexico
  - New Zealand
  - United Kingdom
  - United States

**Our Approach**

- **Increasing Efficiency**
  - **Administration vs. Mission Focus**
    - Managing service delivery and compliance requirements while using older systems and manual processes is inefficient. Spending more time on administrative tasks translates into less capacity for serving others.

- **Improving Interventions**
  - **Intuition vs. Data-Driven Decisions**
    - Data is a valuable tool to illuminate need, inform interventions and evaluate effectiveness, but many organizations rely on suboptimal data capture or have difficulty extracting data for insights. The result: Too often, they have to use imperfect or insufficient data to determine how to allocate their scarce resources.

- **Expanding Funding**
  - **Demonstrating vs. Delivering Outcomes**
    - Organizations are increasingly being asked to report on outcomes, and their ability to raise money is dependent on that data. Responding to funder requirements is time-consuming and diverts attention from delivering those outcomes.

**Our Impact**

- **We deliver technology solutions to our nonprofit and public sector clients...**
  - 90K+ active users
  - 10K+ new participants added daily
  - 11K+ client programs
  - 220K+ daily customer touch points

- **That enables them to do their work efficiently and effectively...**
  - 40%–75% reduction in time spent on reporting and analysis
  - 1%–3% increase or protection of funding due to improved reporting and outcomes
  - 35% reduction in time spent on data capture—and 25% less time checking data integrity
  - 40% reduction in time spent managing service delivery

- **Which empowers them to reach more people and improve outcomes for the communities they serve.**
  - 3.7M+ participants added by our clients in 2020
  - 3.5X more services can be delivered by our clients as a result of efficiencies gained by using Social Solutions software

*Data as of Dec. 31, 2020*
Increasing Efficiency

The Issue
Case workers still spend too much time manually managing data and dealing with communications, compliance and reporting challenges—at the expense of spending time directly serving people, families and communities in need.

How We’re Making an Impact
Social Solutions is helping social good organizations allocate their scarce resources more efficiently.

Our technology solutions help organizations drive substantial productivity gains by reducing the time spent on administrative tasks. For example, we enable staff to input relevant data in just one place and often give program participants the ability to enter their own information remotely. We provide tools that reduce the time spent managing service delivery and reporting as well. Beyond the numbers, more time freed up to serve their communities allows staffers to help drive better outcomes for the people they serve.

CASE STUDY:
FIRST 5 RIVERSIDE COUNTY

Increasing Efficiency to Better Serve Children and Families
First 5 Riverside County Children & Families Commission is a multi-service child advocacy organization that invests in programs and partnerships that promote, support and enhance the safety, health and early development of young children, families and communities in Riverside County, California.

The organization had recently taken on new family resource programming from the Department of Social Services and needed a new way to effectively navigate case management and referral workloads. This led to the exploration of a new database system, which included taking an intentional approach to coordinate services around prevention, crisis intervention and supporting families.

The agency’s data management system required considerable manual intervention, which led to data entry errors that made accurate reporting challenging. It would take multiple business days to review data and reports, slowing productivity. Additionally, their previous data system could not produce integrated views of a family across multiple services, limiting staff’s ability to optimally assess client information.

Streamlining Processes to Benefit Participants
Apricot 360 from Social Solutions provides the technological platform for First 5 Riverside County to dramatically increase efficiency and effectiveness around data, analytics and reporting. As a result, First 5 Riverside County has been able to increase collaboration across service providers for the benefit of children and families.

“The transition has been great,” notes Jennifer Gomez, Program Coordinator. Apricot 360 has simplified and streamlined the ability to refer families and see who is using which services. This is giving us a cleaner platform with greater ability to see any false positives or errors, and we are seeing higher quality in our reporting.”

“In the past, there was a sense that true prevention wasn’t possible and that crisis intervention was what the agency could realistically provide with the bandwidth we have. We’re in the midst of changing this mindset and redefining the work we do as intentional, bi-directional, cross-system and coordinated for prevention,” explains Piera Causley, Regional Manager of Family Resource Centers & Resilient Families.

The work is moving so quickly in human services, so for us, it’s about building an amazing framework with ideas and vision, and we see Social Solutions as playing a key role in bringing our vision to reality.”

— Piera Causley
Regional Manager, Family Resource Centers & Resilient Families
Riverside County Children & Families Commission

300
Average case load for a social worker

38 of 50
U.S. states don’t have enough social workers

Improving Interventions

The Issue

Even before the COVID-19 pandemic and the associated economic fallout, social service demands—from food security and housing to health care and education—were acute and unsustainable. Social good organizations have to know how to apply their limited resources to make the biggest impact for the people they serve.

How We’re Making an Impact

Social Solutions is providing actionable insights that empower social good organizations to focus on the interventions that work best.

Our technology solutions supply case managers with data analytics and tools that help them measure progress, identify potential gaps and take corrective actions where needed. When organizations use data to adapt and learn, they can optimize ongoing programs and create new programs that better respond to the needs of their communities.

CASE STUDY: LINC

Improving Outcomes for Kansas City Children and Families

When it comes to thinking about data in innovative ways, the Local Investment Commission—or LINC—in Kansas City, Missouri, has long been a nonprofit trailblazer. Since 1992, LINC has been raising the bar for public-private collaboration to support families across the Kansas City community. By leveraging data and technology, LINC continues to increase its impact and improve the lives of area families.

Perhaps nothing exemplifies LINC’s success like the Caring Communities before- and after-school initiative it runs in partnership with several local school districts. This program is helping to lift children out of poverty and into brighter, more equitable futures.

At its outset, though, Caring Communities faced enormous organizational challenges. That began changing in 2015 when LINC started using Social Solutions case management software to gain a better understanding of the program’s effectiveness in boosting academic performance.

Boosting Program Enrollment With a Web-Based Form

The 2019 introduction of the software’s web-based pre-enrollment form provided significant efficiencies. This electronic form—available in English and Spanish—has made it easier for time-strapped parents and caregivers to enroll children by entering information directly into LINC’s system through their computer or mobile device. The response was overwhelming.

In addition to enabling LINC to reach more kids, Social Solutions software helped the organization save the equivalent of 17 weeks of time—and 18,000 pieces of paper—because families and staff no longer had to manually fill out and enter enrollment forms.

Researchers have long studied the relationship between educational achievement and socioeconomic background. Social Solutions technology is helping LINC perform its own analysis, in part by combining the student residence ZIP codes our software already captures with Census data. Among other things, that has led to a better understanding of the elements that contribute to student success at each after-school site and has enabled LINC to make program adjustments where needed.

Says LINC’s Brent Schondelmeyer: “We are able to do this analysis in real time, and kids are really benefiting.”

Using Social Solutions software, we can gain a deeper understanding of the students in the after-school program, prove that these kids earn higher grades than nonparticipants and demonstrate that after-school programs help improve school attendance.”

— Brent Schondelmeyer
Deputy Director of Community Engagement, LINC
Expanding Funding

The Issue
Funders want to see clear proof of an organization's impact and effectiveness—with comprehensive data to back up any claims. And that's why robust reporting capabilities have never been more important.

How We’re Making an Impact
Social Solutions makes it simpler for nonprofits and public sector organizations to report what matters to funders.

We start by providing a secure, manageable way to collect and assess data. Our tools then make it easy to translate that information into compelling reports that meet critical funding requirements. Given the individual and ever-changing reporting requests of each funder, our platform also provides the flexibility to scale and customize reporting. As a result, our clients are successfully securing and maintaining support to help those who need it most.

CASE STUDY: ALZHEIMER SOCIETY OF DURHAM REGION

Increasing and Protecting Funding Through Better Reporting
More than 500,000 Canadians live with Alzheimer’s disease today, and another 25,000 are diagnosed every year, according to the Alzheimer Society of Durham Region (ASDR). Based in Whitby, Ontario, the nonprofit provides support programs, educational resources and referral services to improve the quality of life for patients and ease the burden of care for their families.

With an annual budget of approximately $3 million, ASDR relies on government health programs, support from the public and other grants to serve its community. And, like nearly all nonprofits today, it is increasingly expected to demonstrate to current and potential funders how those resources are being used—and what impact they are creating.

“We have an obligation to report back on how we deploy that money because funders want to see a return on investment,” notes Director of Clinical Services Gillian Barrie. “To make that happen, we have to start with a system that allows us to input really accurate data.”

Helping Meet Funder Requirements
Since 2017, ASDR has relied on Social Solutions case management software to help manage client information, track client progress and outcomes, document notes and clinical information, and manage appointment scheduling and attendance.

Just as important, our software allows ASDR to create a wide range of prebuilt and custom reports to meet the varying requirements of different funding entities. That ability is critical because accurate and complete reports provide the best way for funders to assess whether an organization is effective and creating an impact. And that ultimately impacts how grants and other resources are allocated.

Barrie also acknowledges that funders often move the goalposts in terms of the information they require and that her organization has to adjust accordingly. In fact, according to Social Solutions’ most recent Funder Research Survey, more than half of funders noted that reporting requirements have increased in the past five years and are projected to increase further over the next five. The software ensures that ASDR can provide what is needed.

For Alzheimer’s patients, caregivers and families, those resources can make a world of difference.

“The software gives us confidence that we can provide what existing funders need. And we’re also able to attract potentially new funders or new grants because we know we will be able to report on what’s required.”

— Gillian Barrie
Director of Clinical Services, Alzheimer Society of Durham Region
About Social Solutions

Founded in 2000, Social Solutions has grown to be the leading provider of cloud software for nonprofit and public sector social service organizations. We offer clients the most comprehensive and secure social good platform available, including case management, participant connection, data insights, outcome analytics and funder enablement solutions. More than 90,000 active users have adopted the Social Solutions platform to improve their data by measuring and optimizing outcomes.

Our January 2021 acquisition of Canada’s Athena Software expanded both our product offerings and geographic reach. Athena’s global customer base has broadened our footprint in North America and Europe, as well as the United Kingdom, Australia and New Zealand. Further international expansion is planned.

Social Solutions became a Delaware public benefit corporation in March 2021. This certification underscores our commitment to drive social change together with frontline organizations, community leaders and funders. We have a number of environmental, social and governance (ESG) and diversity, equity and inclusion (DEI) initiatives underway within our company as well. Backed by Vista Equity Partners, we are also a member of its Sustainability Leadership Council.

Social Solutions is based in Austin, Texas.

References