

A Streamlined Process for the Suncoast Workforce Development Board

“Gazelle saves us over 1,250 man hours per year that were formerly spent on data entry. I am a raving fan of Gazelle for Sage MIP.”

Stephany Andrews
WIA Program Manager & Case
Manager Supervisor

Running a Workforce Board, and all its different departments, is a team sport. You've got various roles on the team: case managers, case manager supervisors, program managers, fiscal managers, IT managers, executive managers, service providers, partners, and so on, all of whom have separate responsibilities, but all of whom are working on a common goal (i.e., helping to link job seekers with employers). Communication is a key factor, and with the right solution, you can enhance communication and efficiency in important ways.

The Suncoast Workforce Development Board (Suncoast WFDB) is no exception to these dynamics. As a federally-funded, nonprofit organization, its primary mission is to recruit, train, and retain talent for the Suncoast region of Florida. One of the aspects for doing this is connecting Employers and Job Seekers. A key part of this is to manage Training and Supportive Services that ensure Job Seekers have the necessary skills.

With its administrative office in Sarasota, FL and five satellite offices across Manatee and Sarasota Counties, tracking and matching job seekers and employers is of utmost importance to the organizations success. Suncoast WFDB was looking for a more efficient way of managing their Individual Training Accounts (ITA's) and Supportive Services. They were using a paper-based system to track participant activity and realized a system was needed that would automate procedures wherever possible. This system should also help to enforce a common, consistent process for managing the lifecycle of participant accounts. By using an integrated *Tracking + Reporting + Accounting* solution, they would

be able to streamline communications across these different roles, reducing the seemingly endless string of emails, meetings, and conference calls.

The Answer: GAZELLE -- One tool, Many masters!

It's important to understand the concept that an ITA and Support Service *Tracking + Reporting + Accounting* system needs to be a single solution while being able to serve different departments (i.e., Case Management, Program Management and Fiscal Management).

Gazelle helps “integrate” the Back Office (Fiscal) and Front Line Staff (Program).

Participant accounts are dynamic and change over time. These changes, however, do not exist in isolation. Everyone involved in the process of managing participant accounts needs to understand not only the individual changes made by case managers but also how these changes fit within the overall lifecycle of managing the participant account. The integration of an ITA and Support Service *Tracking + Reporting + Accounting* tool with the Workforce Boards Financial Accounting system ensures that everyone involved understands the changes others have made, and enables all stakeholders to:

- Eliminate the guesswork of distributing and tracking available funds
- Automate the entire lifecycle of vouchers
- Eliminate any risk with spending over or under budget

Suncoast WFDB fiscal management was already working with NonProfit Technologies (NPT), for assistance their Sage MIP fund accounting system. As the



preferred Sage MIP business partner for Florida's Workforce Boards, looking to NPT's Gazelle system built specifically for workforce and fully integrated with Sage MIP was the logical choice.

After looking at various options, Suncoast WFDB ultimately decided to go with Gazelle which eliminated manual processes and resulted in less effort and increased accuracy for both the Program and Fiscal departments.

The implementation went very smoothly and Suncoast WFDB was pleased with the amount of support and guidance they received from NPT, both during the sales process and during/after the implementation. NPT came on site multiple times to train case managers, supervisors and administrative users of the system. NPT also offered best practices in various areas of managing Participant Accounts, such as multi-year programs, spending budget vs. enrollment limits, and much more.

Operations have been significantly streamlined with Gazelle. Suncoast WFDB can now keep track of every expense and every activity for each Participant ITA and Support Service Account. Transactions/activities are recorded in real time, without the Program-side having to do accounting and without Accounting having to do case management. Gazelle has allowed the organization to electronically monitor the ITA's and Support Account budget amounts and keep track of their obligations and expenditures. They are now able to keep a tally of how much they obligate and spend by Participant, by Program, by Provider, by Location and by Fund Source; which makes it easier when it comes to running reports.

They use Gazelle to give them the confidence they will be able to meet new and future requirements head on.

According to Stephany Andrews, WIA Program Manager & Case Manager Supervisor, "The Gazelle system has been helpful to our Case Managers in that it helps us to track participant ITA information. By having this streamlined approach we are able to become more efficient and produce better results using this system. When I first saw the system and its capabilities, my first thought was it was going to create additional work, but once I started using I saw how much more effective I was going to be in my role. I'm now a raving fan of Gazelle for Sage MIP."

Stephany continued, "Prior to using Gazelle, our systems were manual and we had to re-enter data over and over again, and that data was not available to us remotely. Now, we only enter data one time which saves a huge amount of time, and we have access to the information from any office. This has allowed our Case Managers to provide better service to our vendors and customers. We are better able to manage cases and the related financial planning and obligate that money to them. We now have better controls to track what obligations are owed to the customer, and that information is available when we need it. Gazelle has also made my job as a Supervisor easier. With all the available reports, I can see how many people are in training, what money is obligated to them, and so much more. The staff loves using Gazelle; they adapted easily and enjoy using it. It has definitely cut down our workload from a data entry standpoint, and now everything is consistent. We easily save a couple of hours per week per case manager, and probably 5 hours a week when we are issuing ITA's. With 12 case managers on my team alone, that is over 1250 valuable man hours per year that we aren't doing data entry, and are able to spend managing our cases better."

We Focus On Your Success.



Financial Accounting Systems
Installation & Integration
Custom Programming
Training & Support

NonProfit Technologies, Inc. (NPT)

NPT understands the unique needs of the public sector and has dedicated its entire business to addressing those needs since 1996. We are a business and technology solutions provider with over 40 locations and nearly 700 public sector clients nationwide. We help federal, state, and local government agencies and nonprofit organizations, including schools, human and social service agencies, religious organizations, museums, and libraries achieve their missions.

NPT provides expert, certified implementation, customization, and integration of industry leading nonprofit accounting software - Sage MIP Fund Accounting and Sage Fundraising 50. Our expertise has been acknowledged through our selection to the Sage Chairman's Club, President's Circle, Million Dollar Club, and as a Sage Select Authorized Partner. NPT is also a Microsoft Gold Certified Partner as well as being the publisher of Gazelle, a complimentary product to Sage MIP fund accounting software specifically designed for Workforce Development Boards and Economic Development organizations.

We also offer a number of training and support services designed to maximize your knowledge of your software and empower you throughout the implementation of our solutions. At NPT, we strive to provide business solutions that exceed your expectations on-time, on budget, and with the functionality we've promised. If you are interested in learning more about NPT's solutions please contact Tammy Massey at 800.404.9758 ext. 123, at tammy@cpaz.com, or visit us on the web at www.cpaz.com.



Authorized Partner