Gateways: Access to Jewish Education operates multiple programs that originated in three different nonprofits, so keeping track of client and employee data across three separate manual systems posed a challenge. The organization, which delivers Jewish educational programs and consulting for children with special needs, was able to overcome this challenge by consolidating key data into one Intuit QuickBase application. The application manages everything from client records to employee time sheets, expenses, and mileage reimbursements. The efficiency gains have been tremendous, saving Gateways approximately 80 hours per year just in one reporting process alone.
About Gateways

Gateways: Access to Jewish Education is a Boston-area nonprofit whose mission is to provide special education services, expertise and support to students with diverse learning needs in Jewish educational settings. Gateways works with schools, synagogues, and after-school programs to support both students and families.

The Challenge

- Disparate data sources and processes from three original nonprofits
- Redundant data entry and tracking across multiple programs
- Off-the-shelf time sheet system not integrated with program management or client records
- Microsoft Access too cumbersome and difficult to deploy across all three programs
- Generating standard reports for client families manual and time-consuming

The Solution

- Intuit QuickBase database application to centralize all client and time sheet data
- Multiple roles created to protect sensitive data and ensure correct access
- Time sheets mapped to programs and clients for accurate reporting
- Standard reports generated from QuickBase to update clients and families

The Results

- Central source of truth for all client, time sheet, and program data
- Fast report generation saves 80 hours per year generating mid-year and end-of-year statements
- Reduced redundancy of data entry and tracking
- More efficient allocation of resources
Built on the merger of two separate nonprofits in 2006, plus the acquisition of a third business unit in 2009, Gateways: Access to Jewish Education struggled to manage key client and staff data. Each program kept its own records in independent administrative systems, mostly built on spreadsheets, so maintaining and tracking accurate data was inefficient and a burden on staff resources. And without dedicated IT resources, building a traditional solution was not feasible.

Gateways found the answer when it implemented a client database built on Intuit QuickBase. The database enables Gateways to maintain accurate client records, time sheets, and other key data, which in turn has streamlined its ability to deliver fast, timely services to clients.

“There are no off-the-shelf products that meet all of our needs for a client database nor for an employee timesheet system. QuickBase allowed us to build our own system that meets all our needs and seamlessly integrates all of our client and employee data,” says Sarah Clark, Director of Finance and Operations at Gateways.

Delivering Jewish education to all children

The mission of Gateways is to enable access to Jewish education to children with special needs. The organization delivers by running Sunday school and after school programs, providing services and consulting to Jewish day schools, and offering grants and consultation to synagogues and preschools in the Jewish community.

Each of those three programs originated in a separate organization. The three came together into Gateways between 2006 and 2009 to better meet the needs of their clients. While the organizations managed different programs, the clients they served were often the same.

Over time, it became clear that the lack of a central repository for client data was an issue that needed to be solved.

“It was becoming a problem to have each program operating with its own administrative systems. There was duplication of effort and things that were falling through the cracks,” says Clark.

For example, if a client that was served by all three programs moved to a different home, the address change would have to be replicated across multiple systems to maintain accurate data across the organization. And there was no formal process for notifying other administrators of the change — someone had to remember to call or email other staffers.

One of the programs had developed a Microsoft Access application to store data, but managing the application was too cumbersome for the small staff.

Gateways also struggled to map time sheet information to client information. For example, a therapist might log time spent in the organization’s off-the-shelf time sheet tracking system we have to remember to log into now.
system, but none of the client’s other data would appear in the same place. This meant mapping client visits to client needs for accurate information required logging into multiple systems.

**Centralized data improves efficiency across multiple areas**

In 2013, Gateways made the decision to centralize key data and streamline program efficiency with Intuit QuickBase. After a few months of configuration (with no coding required and no dedicated IT staff), the organization rolled out a master database application that serves a central repository for client records. Now program managers and other employees can access up-to-date client information quickly and easily, and redundant efforts to maintain data integrity are a thing of the past.

While evaluating QuickBase, Gateways studied Intuit’s security and privacy policies and procedures to ensure that private data would be protected. Using QuickBase’s role-based permissions, Gateways is able to manage access and deliver only the right data to the right employees.

Not only is all customer data now up to date and accessible securely via the web, but Gateways was able to log time sheet information in the same application, giving the organization greater visibility into program activities.

The new system has also had a measurable impact on employee productivity. Gateway has saved an estimated 80 hours per year by streamlining one key reporting process — generating mid-year and end-of-year statements to families with children receiving therapy services.

And Gateways isn’t stopping there. Recently the organization added functionality for managing expense and mileage reimbursements to the QuickBase application, and several other employees have begun to build their own, smaller applications in QuickBase to solve other problems.

“It’s the only system we have to remember to log into now,” says Clark.