



## CASE STUDY - Volunteers of America Chesapeake

Human Services Organization Volunteers of America Chesapeake Leverages KnowledgeTree SaaS Offering to Improve Processes within its Finance Department

### Background

For more than 110 years, Volunteers of America (VOA), one of the nation's largest human services organizations, has been serving nearly two million people annually. Founded in Baltimore, Maryland, in 1896, VOA Chesapeake is one of the first branches of the national organization. As a faith-based, non-profit corporation providing high quality human services that result in positive life changes for more than 8,000 people every year, VOA Chesapeake meets the needs of persons in Maryland, Virginia, and the District of Columbia.

Under the cost reimbursement method of funding for non-profit organizations, government grants play a key role in helping VOA Chesapeake meet the needs of its community. After grants are secured, funders require receipts for cost-reimbursement invoices. VOA Chesapeake's paper-intensive processes made the filing, archiving and retrieval of billing and accounts payable invoices difficult to manage and cost unnecessary time and dollars. In addition, audit reports pointed to its poor documentation and lack of archiving, making the need for an audit trail crucial to continue operations. Lost documents were leading to lost revenue and hindering the overall mission of the organization.

As a non-profit company, VOA Chesapeake needed to minimize operational costs to ensure the maximum available budget for its core human services. Since it did not have the time or resources to deploy and maintain a large IT infrastructure, it focused its search for a solution on those providers with hosted offerings that were easy to use and implement.

### Partnering with KnowledgeTree

VOA Chesapeake needed a scalable solution that would first roll out departmentally, and eventually be implemented across the entire organization. The solution needed to provide secure access to documents from anywhere, at anytime via a web browser and enable effortless collaboration among geographically dispersed employees. VOA Chesapeake evaluated several document management systems, including SpringCM, but ultimately selected KnowledgeTree's software as a service (SaaS) offering for its ease of use, rapid implementation and cloud-based hosting on Amazon Elastic Compute Cloud™ for security.

KnowledgeTree was easy to implement, and its intuitive interface ensured quick adoption by the entire finance department. VOA Chesapeake completed implementation in only 60 days with all accounts payable and accounts receivable documents, billing invoices, cash receipts and bank reconciliations seamlessly loaded into the system - making it easy for the billing department to pull the relevant invoices and speed up the annual audit process by enabling the retrieval of test invoices on the fly.

Specifically, KnowledgeTree provides Volunteers of America Chesapeake with:

- Enterprise-class document management functionality without the cost, maintenance, administration, and infrastructure requirements of traditional on-site solutions
- Secure access to documents from anywhere, at any time via a web browser
- Effortless collaboration among geographically dispersed employees
- Faster time-to-value with rapid deployment and minimal training requirements

- A familiar interface through close integration with Microsoft® Office suite that reduces users' learning curves and makes them productive more quickly
- Integration with the Zoho Office Suite that provides a complete online work environment for mobile and remote workers without the need for desktop applications
- Cloud-based hosting on Amazon Elastic Compute Cloud means the application instance and database are self-contained and secure
- Rich and open APIs that let users easily integrate KnowledgeTree with third-party applications

### Uncovering Additional Revenue Streams

With recent budget pressures, grant providers have stepped up the auditing process and do not pay for any invoices without back-up documentation. With KnowledgeTree, Volunteers of America Chesapeake can easily link receipts with cost reimbursement invoices. This has helped facilitate 100 percent cost reimbursement from county and city governments. Further, with documentation at their fingertips, the entire billing process only takes seven to ten days and digitizing the process had led to a more "green" environment, greatly reducing the amount of paper used. The organization anticipates additional revenue recovery of \$30,000-50,000 as a result of implementing KnowledgeTree.

While many non-profit organizations use cloud computing and SaaS solutions for fundraising, Volunteers of America Chesapeake is one of the few embracing it for back-office processes.



# KnowledgeTree™

Document Management Made Simple

The organization discovered that hosted, enterprise-class document management functionality without the cost, maintenance, administration, and infrastructure requirements of traditional on-site solutions saves time, resources and money that it requires to meet the human service needs of its community. Faster time-to-value with rapid deployment and minimal training requirements mirrors a non-profit's business model.

Looking to the future, Volunteers of America Chesapeake has integrated KnowledgeTree with existing accounting applications, including ACCPAC, and plans to integrate with its budgeting system this spring. The organization also intends to roll KnowledgeTree out to other departments, beginning with development and hopes to have it implemented organization-wide in the next few years.

For more information, visit [www.knowledgetree.com](http://www.knowledgetree.com).

## About KnowledgeTree

KnowledgeTree is an enterprise content management provider focusing on affordable document management software that is easily installed and used by business professionals. Offering commercial SaaS and on-site editions as well as a free, open source community edition, KnowledgeTree's features — including workflow, version control and audit trails — help organizations manage the document lifecycle, promote collaboration, reduce paper and ensure compliance.

As a commercial open source company, KnowledgeTree is committed to affordability, accessibility and integration across operating systems and applications. Customers include organizations of all sizes in many industries, including life sciences, legal, financial and government sectors. KnowledgeTree is headquartered in Raleigh, NC.