

Case Study

**Lincoln Animal
Ambassadors
modernizes
information-
heavy processes
across the
nonprofit.**



INDUSTRY
Nonprofit

COMPANY
Lincoln Animal
Ambassadors
Lincoln, NE

lincolnanimalambassadors.org

Lincoln Animal Ambassadors was founded in 2008 with a mission to assist pets and their people by providing a voucher-based low-cost spay/neuter program, a temporary assistance pet food bank, a low-cost vaccination clinic, and by hosting events in the community to educate people on ways to be responsible pet guardians.



Lincoln Animal Ambassadors uses FileBound across many programs. Client assistance requests can be submitted, tracked, approved, and fulfilled online. Clients can easily attach supporting documents, such as income verification, in one step. Local vets can submit invoices and receive reimbursements quickly, and the nonprofit's content center case management is more easily managed. The list goes on.



How can a nonprofit increase efficiency and give clients a better experience?

Lots of programs, lots of paperwork.

Lincoln Animal Ambassadors had many processes, from accounts payable to assistance requests and volunteer management, that were driven by paper. Notably, their Pet Food Bank and Spay/Neuter Voucher Program issued physical payment vouchers for services, and placement in the programs depended on clients mailing in paper applications and income information. Staff had to manually approve and process paperwork, a cumbersome task that took as long as six weeks in some cases. This nonprofit needed a more efficient system.

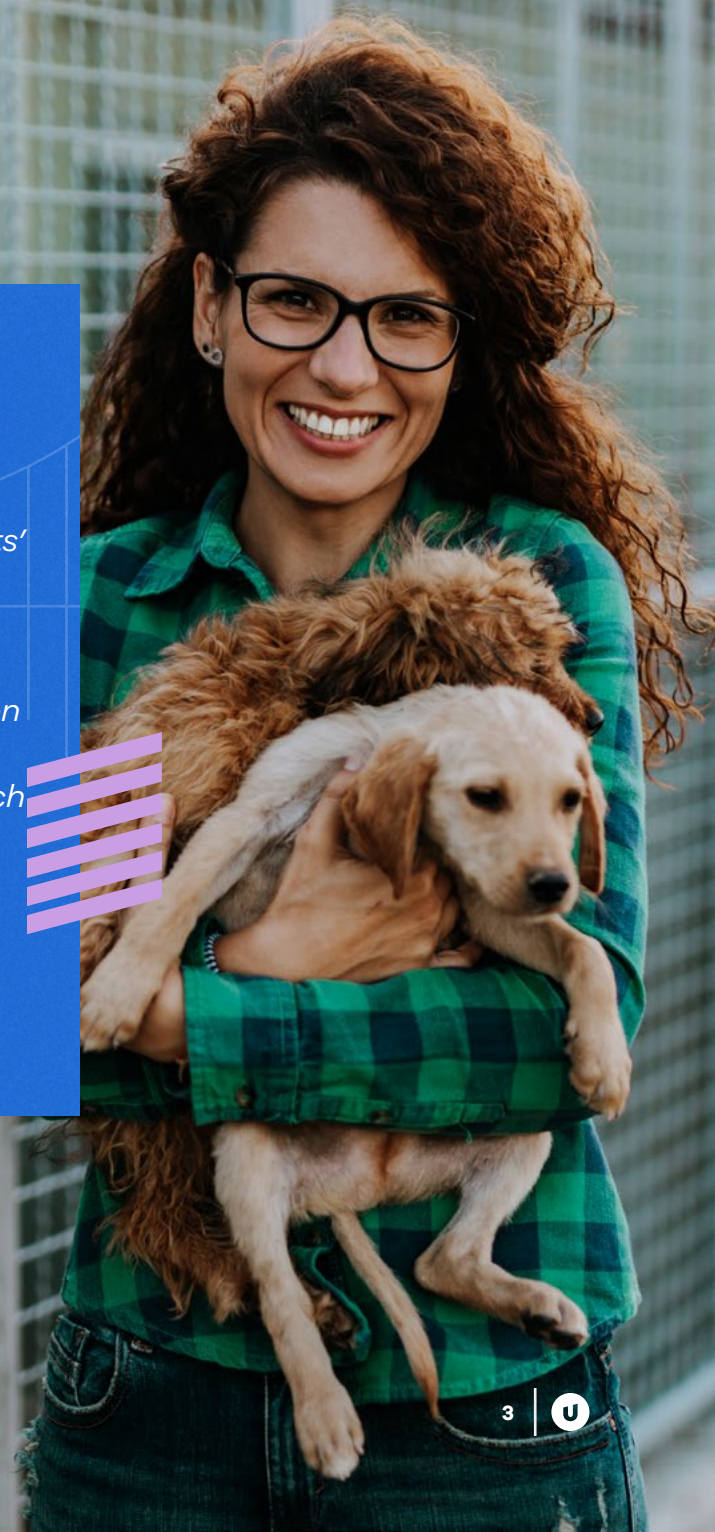
FileBound helped upgrade old manual processes.

FileBound replaced paper processes for the Pet Food Bank and Spay/Neuter Voucher Program with automated workflows that allow staff to review, track, and approve client requests online from one centralized dashboard.

Staff save time, clients receive needed services much more quickly, and documents and supporting information are securely stored in the FileBound cloud for fast, easy access by permissioned users.

"FileBound's automation has reduced time spent issuing spay/neuter vouchers by 75%. We can track Pet Food Bank clients' use of the Spay/Neuter Assistance Program more efficiently. The number of emails exchanged between volunteers has also been significantly reduced, which is a huge time saver. I am very pleased with the product."

– Pauline Balta
Lincoln Animal Ambassadors



This team improved processes for two key programs using FileBound.

Spay/Neuter Voucher Program

Historically, client records were stored in an access database and vouchers could only be issued via mail by a single individual. Pet Food Bank applicants were required to apply separately for the program, and records were difficult to coordinate between the two programs.

Using FileBound, applicants to the program can now apply and securely submit income validation documentation online. All applications are tracked and coordinated between the programs. A workflow process allows for reviews to confirm application information and instantly create and issue vouchers via email. There has been a dramatic reduction in waitlist times to receive a voucher—from three to six weeks to less than one day.

For veterinarian offices to receive reimbursement, the old process required them to mail paper invoices and a physical voucher, and the nonprofit staff would match everything with client invoices. Now veterinarians use FileBound to securely submit reimbursement requests via an online portal or a designated email address. They can also validate a voucher to ensure it will be honored before completing the surgery. Payments are then matched and automatically issued in less than one day, instead of two to three weeks.

Pet Food Bank Program

Changes to the Pet Food Bank Program required seamlessly coordinating approved clients, pending applications, and new applications from one centralized form. Applicants were required to apply using a paper form and submit income verification documents. Prior to combining the applications

to both programs in FileBound, this meant the applicant had to provide the same information twice. The online application now allows clients to apply for both primary assistance programs using a single application.

Clients can securely submit income verification documents using the online form or through a follow-up message, which is emailed to them as part of the application confirmation. FileBound automatically adds all responses to their application file.

The Pet Food Bank team can issue a digital identification card rather than mailing a paper card when the application is reviewed.

FileBound has significantly reduced the amount of paperwork mailed from the primary warehouse location to the application processor and has dramatically reduced wait times for services.

But wait, there are more areas that now have better processes in place!

Accounts Payable Processing

Lincoln Animal Ambassadors uses FileBound to streamline accounts payable processes, including tracking expense reports, reimbursement requests, and operational invoices. Invoices are imported from a designated email address or scanned using Upland Intelligent Capture. Invoices are routed via FileBound for GL coding and approvals. This use case is critical to the operational effectiveness of the organization.

Volunteer Management

This nonprofit also uses FileBound for volunteer applications and volunteer onboarding. New volunteers are required to submit an application via FileBound, which is reviewed by the volunteer coordinator and can be assigned for review of specific functional areas. Volunteers then

complete and sign onboarding documents in FileBound, such as privacy, harassment and liability release documents. Tracking to ensure volunteers have completed the necessary documents prior to volunteer activities is easy with FileBound.

Contact Center

FileBound helps to manage the nonprofit's contact center effectively. Once callers leave a voicemail, the message is transcribed via the phone service and emailed to a designated email account. The message is ingested into a FileBound Form, and a call ticket is created for staff to manage. This capability is mission-critical, as clients must schedule an appointment with the Pet Food Bank and include information about their pet's and dietary requirements. FileBound was implemented in this area during the pandemic to make it easier to facilitate no-contact food distributions.

Donor Management Program

FileBound provides a complete donation history for each donor, tracking totals and making it easy to export and create donor mailing labels for the quarterly published and mailed newsletter.

The accounting team is also able to track all donations using a donation form, which creates donation receipts which can then be emailed or printed and mailed to donors. All donation information is also scanned so that designation documentation is tracked. The donor system also allows the grant team to track grant's received – as well all reporting requirements are being met at designated times. Because the system also houses the accounts payable system – the grants team can easily pull all payment records tracked to individual grants that they need for reporting.

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FileBound

For more information visit: uplandsoftware.com/filebound

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.