

NON-DENOMINATIONAL RELIGIOUS ORGANIZATION TAKES CONTROL OF THEIR TASKS WITH GLOBALSEARCH[®]

Case Study:

Child Evangelism Fellowship Ohio
With Kyle Latchaw, State Director of CEF Ohio

Industry:

Religious Organization

Departments Impacted:

Human Resources

Featured Products:

GlobalSearch[®]

Objectives:

Implement a secure solution that guarantees fast access to documents.



Since 1937

CEF

CHILD EVANGELISM
FELLOWSHIP[®]

Reaching children worldwide[™]

Meet *Child Evangelism Fellowship*[®] of Ohio

Child Evangelism Fellowship (CEF[®]) is an international para-church organization whose three-fold purpose is to evangelize children with the Gospel, disciple them in the word of God, and establish them in bible believing churches. This mission is carried out through two main ministries, the Good News Club[®], an international collection of more than 36,000 set locations, and the 5-Day Club[®], a traveling program that aims to reach children where they are. These programs occur in neighborhood settings such as homes, backyards, schools, and community centers and are designed to bring the Gospel to children on their level in their environment. Along with these clubs, CEF also has a variety of ministries for children, including fairs, camping, open air, and online. Last year, all of these ministries combined reached 16.4 million children worldwide. In conjunction with CEF's evangelization efforts, the organization trains other Christians to evangelize with the Gospel, produces and distributes Bible and missionary lessons and related materials through its own CEF Press[®].

The *Child Evangelism Fellowship* of Ohio includes 10 chapters, each assigned a certain number of counties. Combined, these chapters contain 185 *Good News Clubs*, reaching about 18,000 kids and operating with close to 700 volunteers.

Challenge

The Child Evangelism Fellowship of Ohio is responsible for retaining a significant number of documents, including board minutes, financial records, applications, and other human resources documents. *CEF* Ohio needed a solution to access and share these documents while maintaining compliance with their retention requirements and protecting all the personal information they collect on their documents and forms. They also needed to deploy the solution as quickly as possible to minimize the risk of not having a solution in place.

Quicker and better access to these documents is crucial for *CEF* Ohio, especially in the event of audits and legal issues.



"What if *CEF* Ohio needed to get this information that came from years in the past, the question is whether or not we would have those records,"

Kyle Latchaw, State Director

Retaining these documents in an accessible way is crucial to ensuring *CEF* Ohio has the information it needs; it's also part of the broader *Child Evangelism Fellowship's* organizational policy.

In addition to these challenges, *CEF* Ohio's documents, such as their background check authorization forms which contain protected personal information (PPI), limit how the organization can send them. "We can't scan and send those forms via email because it has too much PPI, such as where they live and their social security numbers. That information has to either go through fax or via snail mail," states Latchaw. These remaining options for sending private documents are less appealing to *CEF* Ohio, so the organization looked to fully embrace a digital transformation.



"CEF is going to get to the point where you have to be able to operate technology. It's not a question anymore,"

Kyle Latchaw, State Director

This desire for technological change, to eliminate the large amount of paperwork stored in boxes, the need to access and securely share records, and stay in compliance with their retention policies, led *CEF* Ohio to search for a digital solution.



Solution

Kyle Latchaw learned about Square 9 and GlobalSearch during his mentorship at *Child Evangelism Fellowship*, West Virginia. "I went down to *CEF* West Virginia for a couple of days and it was on my mind how to digitize our records, there I learned how *CEF* West Virginia digitized their records, and *CEF* Ohio built our solution based on that," said Latchaw. *CEF* West Virginia had been working with Office Information Solutions (OIS) since 2012 to implement their own solution and recommended OIS to partner with *CEF* Ohio. With more than 25 years of experience with businesses of all sizes and a proven track record of helping those organizations increase productivity and reduce costs, Office Information Solutions was able to help *CEF* West Virginia meet their needs, and now *CEF* Ohio as well.

OIS was able to leverage the work from the West Virginia location to quickly implement the solution due to their understanding of *CEF* requirements and familiarity with the Square 9 platform.

When asked if *CEF* Ohio had considered any other solutions, Latchaw mentioned that this is *CEF* Ohio's first attempt to digitize its records. He also noted that other *CEF* state offices use other solutions to manage their files but that he decided to go with an ECM system because of the control and oversight it provides.



“GlobalSearch allows users to index and place the document in the proper place,”

Kyle Latchaw, State Director

To add to this control and oversight, *CEF* Ohio's uses dropdown menus for fields wherever possible to limit scenarios where improper indexing can occur.

CEF Ohio decided to implement the GlobalSearch cloud version for two key reasons. Firstly, Latchaw mentioned that without a set office, *CEF* Ohio's server would change hands with each change in leadership. The second reason is server maintenance. “I don't know how to run a server. It's much easier to pay someone else to maintain that server outside the organization,” said Latchaw.

Now *CEF* Ohio is able to share sensitive documents securely while requiring credentials to access them. This makes the monthly reporting process more efficient and gives the state office immediate access to information rather than incurring the expense and/or delays associated with faxing, mailing, or emailing the document.

Benefit

The entire solution was implemented quickly, mitigating any risk of not having the solution in place. Once *CEF* Ohio started to use GlobalSearch, the setup went off without a hitch, however the number of records that need to be kept within the system is quite large. To solve this, *CEF* Ohio set a specific date after which all records needed to be kept in GlobalSearch. Staff is also expected to upload any records prior to that date into the solution over time. Additionally, the free education from Square 9 and a quick reference guide developed for *CEF* Ohio staff to tell users how exactly to upload, file, and share the documents in GlobalSearch, allowed users to learn how to use the new solution quickly.

For the staff of *Child Evangelism Fellowship*, one of the main draws of the solution is the quick access to information that otherwise would have been time consuming to gather. For example, *CEF*'s worker's compliance agreement verification forms and their child protection policy verification forms.



“Each of the 400 chapters' chairmen has to say 'yes, we are abiding by the child protection policy' and 'yes, we have an active worker's compliance agreement on all volunteers within the last 12 months. With GlobalSearch, a chairman can go into the record retention system, see who works at each Good News Club, type in their name, and see what documents are on file.”

Kyle Latchaw, State Director

CEF Ohio staff also feel better knowing that their documents will be completely safe in the event of a disaster. Pointing to a stack of unindexed documents, Latchaw notes, “If this office catches fire right now (lord willing, it won't), all those records are gone. With a cloud-based system, that's not the case.”

Results

Having stored 3,700 documents and continuing to add more, *Child Evangelism Fellowship* Ohio's GlobalSearch solution is already streamlining and simplifying a number of document-related tasks. For example, Latchaw recalls a time in which he was at one of the local chapters and they were asked about the status of some documents. Leaders from other chapters could not provide immediate answers, but getting that information was a simple feat for *CEF* Ohio. "All I had to do was go in there where those files were drawn, and I could see the last document inserted for that person. It told me the last time they had their background check reviewed and the status of the worker's compliance agreement forms of everyone there," states Latchaw.

Another drastic improvement is how *Child Evangelism Fellowship* Ohio keeps track of its meeting minutes for a yearly audit. *CEF* Ohio must maintain these minutes for independent audits to be eligible for grants.

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"It takes me less than 30 minutes to go across the state with 10 chapters to determine if all of their minutes are in. Before, it would require each individual secretary of each committee to turn in their minutes to the treasurer, who's turning in all those documents to the auditor,"



Kyle Latchaw, State Director

The efficiency with which *CEF* Ohio can locate documents for these audits also saves them money. "Time is money for a compensatory staff member, and the less time they have to spend on conducting or finding a report saves us on both," says Latchaw.

As a statewide organization, *Child Evangelism Fellowship* Ohio has also significantly benefited from the remote, shared access GlobalSearch Cloud provides. "It centralizes records retention," noted Latchaw. GlobalSearch has simplified document storage for everything from human resource documents, meeting minutes and financial documents. *CEF* Ohio's solution has even helped increase financial compliance. "We have set R forms due on specific days of the year. All I have to do is look into the system. I don't have to look through my emails; I don't have to download them," said Latchaw. GlobalSearch helps automatically compile information for the organization's 990 form as a state. "I can easily grab the information, and export it as a single file, and it goes to where it needs to, or my treasurer has access to these documents and can send them," Latchaw explains.

In short, *Child Evangelism Fellowship* Ohio is seeing tangible benefits from its Digital Transformation. When asked what he would miss if *CEF* could never work with Square 9 and OIS again, Latchaw said, "The ease of access to information."

And when asked what he would tell a friend looking to invest in Square 9 solutions, he stated, "The cost of putting together a procedure; the time, the effort, and the cost to have it in place is way lower than not having the documents available when you need them." This solution was based on *CEF* standard requirements, so it can be implemented very quickly for any other *CEF* location.

