

# Case Study: Human Services Technology for Nonprofits

## For The Silent Embraces Casebook to Streamline Operations, Improve Collaboration and Grant Reporting

*For The Silent, a non-profit organization founded in Tyler, Texas by Kenny and Julie Rigsby, aims to be the voice for sexually-exploited girls in east Texas. According to estimates, 79,000 Texas youth have been the victims of domestic minor sex trafficking—a chilling statistic the organization works tirelessly to combat through advocacy, case management, mentorship, survivor care, and community transformation programs. For The Silent empowers a generation of youth with the knowledge, confidence, and support systems to identify potentially exploitative situations and to find their way out and into a place of safety and hope for a thriving life. In addition to survivor care, which is focused on helping impacted youth heal and regain trust, For The Silent offers a 10-week “I Have A Voice” prevention education program, along with professional training in commercial exploitation of youth for law enforcement, medical professionals, and social service providers.*

### Challenge

Texas is a hot spot for sex trafficking of minors, and non-profit For The Silent is dedicated to advocating for victims, whether it's guiding interactions with law enforcement, providing

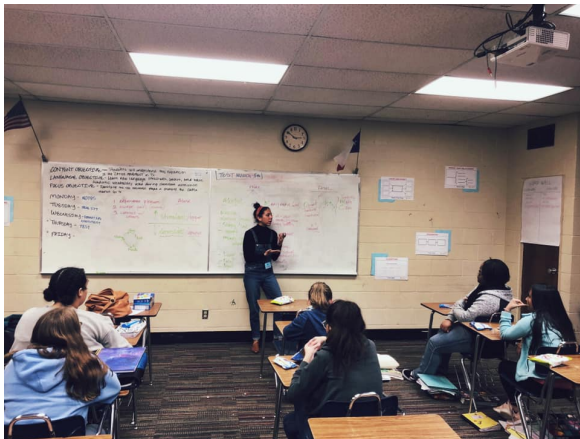
one-on-one counseling, or simply helping a minor secure safe housing and a hot meal.

Every interaction with a potential client is meticulously documented, and the complexity of managing paperwork and finding critical information was highly inefficient using traditional paper-based forms and processes such as scanning and manual data re-entry.

A typical client engagement requires advocates to fill out a variety of consent, disclosure, and medical permission authorizations; perform intake interviews to capture client history and pertinent information; and notate any and all subsequent interactions and service delivery. Prior to using Casebook, everything was filled out by hand, scanned and input into Word documents, with limited to no search capabilities due to the lack of a centralized electronic database of client information or forms and notes to leverage as a shared resource.

Adding to the organizational pain, reporting tasks to meet grant reporting requirements was a painstakingly difficult manual process. Funding requirements require For The Silent to create monthly and quarterly reports to track every service offered to clients, as well as the

number of active clients, the types of victimizations, and other special classifications in order to stay in compliance for funding. As part of more complex reporting requirements, For The Silent needed to track highly specific scenarios--for example, determining the number of female youth receiving awareness messaging in juvenile detention or the number of crisis recoveries of youth. With no clear visibility into the workload of advocates and the needs level of their current client load, both of which were requisites for workload balancing and grant reporting, legacy processes and barebones systems, For The Silent regularly struggled in meeting requirements.



*I Have a Voice (IHAV) is a 10-week prevention education program reaching teen girls most vulnerable to commercial sexual exploitation.*

“The conversion from notes to spreadsheets by hand was tedious and created possibilities for errors,” says Justin Reese, For The Silent’s internal volunteer technologist. “If we could enter data in an electronic way to be queried then we could save a human several weeks of very manual and error-prone work. We could

also be more confident in the accuracy of data to ensure compliance with grant reporting.”

To meet reporting requirements, a dedicated grant manager spent at least a quarter of their time perusing every case file in the system, manually hand-examining and tabulating the services data into a spreadsheet where it could be summarized into reports.

**Learn More and Donate**  
[www.forthesilent.org](http://www.forthesilent.org)

## Solution

For The Silent turned to Casebook, a Software-as-a-Service (SaaS) platform designed specifically for human & social services organizations. Because of an earlier failed attempt at modernization, For The Silent knew that the software needed to be intuitive and naturally integrated into the advocates’ daily workflow so they would be inclined to use it, not avoid it.

“The software needed to be super quick and user-friendly so that the advocates didn’t feel bogged down by the notes because this work is very, very fast paced,” explains Rebecca Renfrow, former executive director at For The Silent “We want them to feel less pressure about [notes] so they’re more likely to do them consistently which tells a better narrative with the client. It also makes for less burnout.”

The simplicity and modern style of the Casebook user interface was a significant advantage for getting advocates to embrace the system as the digital workflow mirrored advocates’ daily routines and didn’t require



*For The Silent provides training for law enforcement, medical professionals, and social service providers in order to equip and empower those on the front lines.*

*“Our advocates are at their best when they are able to spend their time and energy with clients rather than focusing on administrative tasks,” Angela Krüsi, Executive Director at For The Silent, said, “Using Casebook has created more space in their schedules and to-do lists.”*

complex navigation of myriad radio buttons and screens, Reese says. To begin the transition, Reese outlined the current workflow, spending time interviewing advocates to get a sense of the data captured as well as its flow throughout the organization. With that information in hand, Reese began mapping the existing For The Silent data fields and workflows to the Casebook system, making adjustments and leveraging Casebook’s customer success team to configure options when and where necessary.

By moving from manual data entry to Casebook digital workflows, Reese was able to optimize and create productivity shortcuts. Consider the case notes or service collection form--a document used multiple times daily by advocates to track all services provided, from

food to a phone call with a parent. Prior to Casebook, advocates manually documented the services provided, assigned a numerical score dictated by the state to summarize activity, then input the appropriate information into separate fields within a spreadsheet. With Casebook, Reese was able to create a menu of common events—an interaction class, a phone conversation, a lunch provided—and the system automatically translates the checked services into the appropriate government credits, which greatly streamlines reporting.

Understanding the benefits of using technology to streamline operation, For The Silent modified some of its processes to fit the

software, Reese saw the adjustments as a benefit, not a bug.

Casebook makes a distinction between a case and an individual—something the advocates did not do as part of their manual work patterns. Yet making that modification to their workflow to accommodate the software had an upside: Consider a scenario when a phone number is changed for a police officer affiliated with multiple cases. In the paper-based system, advocates would have to remember to manually update the number change in every related file whereas in Casebook, the change is made once and the updated information flows to all relevant cases.

“Software with a well-defined vision is better in the long run - otherwise the system can become an unruly junk drawer to fit all workflows,” Reese said. “The simplicity, directness, and clarity of [Casebook’s] UI was worth having advocates adapt workflows.”

## Results

For The Silent is seeing a marked difference in the amount of time advocates spend recording notes and reviewing documentation from previous interactions. Data tracking and notation is not only more accessible, it’s also more accurate because there is a clear workflow for every staff member to follow. In addition, digital management of clients in Casebook has been a significant time saver for the staff, which no longer has to chase down advocates to get a handle on key metrics like “active clients by advocate,” and instead, can do a simple system search.

Casebook’s most significant impact has been on the grant reporting process. Before

adopting the software, too much time was spent on tallying services, leaving room for human error. With Casebook, For The Silent reports its work with greater accuracy and transparency, transforming grant reporting season from days of gathering scattered information to a much more streamlined process of pulling reports from the system.

With advocates able to reap the benefits of shared documents and streamlined workflows, Casebook has freed the team from unproductive paperwork to focusing on its mission of helping distressed youth. “Our advocates are at their best when they are able to spend their time and energy with clients rather than focusing on administrative tasks,” Angela Krüsi, current Executive Director at For The Silent, said. “Using Casebook has created more space in their schedules and to-do lists.”

## About Casebook

Casebook is a configurable platform built to support growing nonprofits in their missions. Built to support multiple programs and multiple workers on a case, Casebook is configurable to meet the needs of nearly any human services organization.

Affordable pricing options are available on the Casebook website.

Learn more at [www.casebook.net](http://www.casebook.net) or by contacting our team at [info@casebook.net](mailto:info@casebook.net) or (212) 796-6108.