

## Casebook: A 21st Century Human Services Solution

Casebook® is an innovative, internet-based application that uses Web 2.0 technology to transform child welfare and human services case management. Casebook is the response to years of frustration among child welfare and human service professionals and leaders who have toiled with information management systems that are difficult to use and expensive to maintain—and that fail to deliver for vulnerable children and families.

Originally developed as an initiative of the Annie E. Casey Foundation, a national leader in child welfare policy and practice, Casebook is designed to revolutionize child welfare and human services, by providing states and localities with 21<sup>st</sup> century technology tools to help caseworkers do their jobs more effectively, enable administrators and supervisors to make smarter decisions, and ultimately better serve the children and families who need help most.

### Understanding the Opportunity

Data is at the heart of effective human services and case management, yet current information management systems make data about children and families difficult to track, analyze, and apply.

A significant part of the problem is that technology has struggled to keep pace with the demands of effective case management. Most states, in order to get federal financial incentives, are using outdated technology that requires hours of data entry and cleaning, and a linear data structure that doesn't allow caseworkers and supervisors to choose how they organize the data so it is most useful to them. Caseworkers and supervisors have to make critical, life-shaping decisions based on fragmented, inaccurate, and often out-of-date information. Agency managers lack the ability to spot trends quickly, deploy services efficiently, allocate funds effectively, and improve performance across jurisdictions.

The results are troubling. Experienced caseworkers burn out and quit, and younger workers are frustrated by the technology and quit. Too often, agencies have overwhelming caseloads, allocate resources inefficiently, and struggle to distinguish between what is working and what is not. Children and families suffer without the support they need.

## Pursuing a New Vision

Technology must support effective policy and practice, not hinder it. In nearly every other sector of commercial and social life, new web-based and information technologies have helped to achieve revolutionary gains in efficiency and effectiveness. Not surprisingly, private sector investment in these technologies has matched their game-changing potential; yet human services continue to fall further and further behind.

Case Commons, Inc. offers a new approach by harnessing the most advanced technologies to dramatically improve information technology in child welfare and human services. A 501(c)(3) nonprofit, Case Commons™ has three objectives:

- **Changing Lives:** above all, Case Commons seeks to improve outcomes and life opportunities for vulnerable children and their families
- **Helping the Helpers:** Case Commons believes new technology must support the frontline workers who serve our nation's most vulnerable children and families—not replace or constrain them
- **Measuring Results:** Case Commons uses the latest technology to improve the quality and timeliness of data and analytics tools, so that policymakers and caseworkers can understand what works, and what doesn't—and then use that knowledge to make smart choices

The vision is simple. Caseworkers will spend more time working with children and families and less time filling out data forms. Supervisors will be able to track family progress and won't have to worry whether caseworkers are losing track of cases. Technology will facilitate collaboration, support best practice and provide value during every interaction, rather than getting in the way. Administrators will have the information they need right at their fingertips, in real time.

Case Commons makes this vision a reality.

## Our Organization

Case Commons brings together the best thinking in child welfare and human services practice with cutting-edge expertise on software and data management. Our organization was initially funded by – and continues to be supported by – the Annie E. Casey Foundation, the leading philanthropy dedicated solely to disadvantaged children and families in America. As a 501(c)(3) nonprofit, Case Commons' mission is to draw on the decades of knowledge, experience, and expertise developed by the Casey Foundation in order to design information technology systems that meet the needs of frontline caseworkers, improve decision making and policy, and help children and families succeed.

To collaborate with states and localities to configure Casebook to meet their unique needs and improve outcomes for vulnerable children and families, we have assembled a team that unites practice and technology innovators. Our staff includes:

- **Nationally recognized experts and innovators in human services practice, policy, and management**

- **Among the very best product developers, technologists and software engineers, including one of the leading software development firms worldwide**
- **Top-flight innovators in analytics and system implementation**
- **Specialists in organizational change**
- **Top designers, including a team from one of the nation's leading design firms**

Our organization is structured with a Practice Team, a Product Team, a Training and User Support Team, an Engineering Team, and an Analytics Team. These teams work with each other and with you to ensure that each element in Casebook incorporates the best thinking from these fields.

Working from a common Casebook core, our team members will configure our technology tools to address your current needs and anticipate future ones; help you analyze performance; work with your case managers and administrators to ensure the information management system enhances their work rather than getting in the way; and help you continue to innovate and improve over time

## **What Makes Casebook Unique?**

Most case management systems fixate on compliance. Casebook focuses on results for families. Casebook's better data, better usability, and better tools all transform how caseworkers provide services to vulnerable children and families—and improve the quality of compliance reporting at the same time.

Casebook accomplishes this by fitting into and enhancing the day-to-day work of case managers, rather than adding to it. Casebook is organized and behaves intuitively. Through Casebook, caseworkers and supervisors alike enjoy vastly improved capacities to access and interact with the data they have entered.

A truly web-based, real-time family information management platform, Casebook makes extensive use of proven social web models and visual media to support family-centered practice while strengthening team-based collaboration.

Unlike other case management systems, Casebook provides a range of transformative tools.

### **BEST-PRACTICE TOOLS**

- **A rich visual history of families and cases that is built automatically**, helping new teams get up to speed immediately
- **Extensive graphic visualization** to help users quickly get up to speed and manage complex relationships
- **Matching engines**, that can, for example, rank families and services to help caseworkers identify placements that are more likely to succeed
- **Access to real-time data** to help caseworkers quickly gain a full understanding of a given family, and to allow supervisors to make decisions based on up-to-the-minute information

- **Service plans that reflect all of the people in a family network** and the individuals supporting them
- **Support for virtual case collaboration and multiple users with different roles**, which reduces time on the phone and travel time, while encouraging collective thinking and information sharing
- **Automatic alerts, reminders, checkpoints and prompts** that keep case management on track

## PROFESSIONAL DEVELOPMENT

- **Practice tips and positive feedback** to help reinforce good decisions
- **Ability to load podcasts from your training department** to address common casework problems or remind workers of “tools” they may have learned in practice (for example, “Developmental Signs of a Nine-Month-Old Infant”)

## DATA AGGREGATION AND SYSTEM MANAGEMENT

- **The ability to fulfill federal and state reporting requirements**, including automatic generation of case overview forms and exporting of federally required data elements for selected populations
- **An approach that transcends traditional case silos** to afford a view of people over time and beyond the scope of individual cases, helping caseworkers to always see families and people rather than case snapshots
- **A tool for capturing both narrative and structured data** that prompts the user to take action that will help the family

The next generation of child welfare information technology is not just a sleek, modern-looking interface layered over a linear, legacy tool. It’s Casebook—an application whose innovative tools are embedded within its revolutionary data entry and management systems.

## Casebook Analytics—A Game-Changing Feature

Casebook Analytics is the newest Casebook tool. It drives Casebook’s focus on results by helping human services teams explore their data and share insights with one another. Through attractive, cutting-edge, and interactive data visualization and feedback, Casebook Analytics can show caseworkers, supervisors and administrators how they are doing, both at the level of an individual case and across an entire human services system.

This means that Casebook Analytics, currently in its prototype phase, will enable users to make sense of overwhelming amounts of data by organizing it in useful and intuitive ways. It can show data trends over time, focus on different levels (from a single case to an entire department), and explain to users what different metrics show and why they are important. The analytics are designed to answer the “big” questions, helping users to understand not only what is happening but also allowing them to see and anticipate opportunities for improved practice.

When presented through Casebook Analytics, data tell a story—one that can encourage conversation about improving practice among all users, even among those who are new to working with data.

What sets Casebook Analytics apart?

- **Embedded Metrics:** Casebook Analytics presents data in compelling ways precisely in the context of the work that caseworkers do every day. Keeping “progress to grade” front and center, for example, can encourage a caseworker to pay closer attention to school enrollment and educational stability
- **Person- and Family-Centered:** Casebook Analytics is based on Casebook’s unique longitudinal data model. Casebook is not built around cases, but rather around individuals and relationships. This makes Casebook Analytics fundamentally different, and enables administrators to follow entire entry cohorts over time and across all services
- **Best Practice Context:** users can always see how metrics are calculated, including the quality of the underlying data. There are also built-in explanations that explain what different metrics mean and why they are important to practice
- **Predictive Analytics:** Casebook Analytics can run statistical models to deliver real-time guidance to help frontline teams make decisions

Developed from decades of best-practice and cutting-edge research, funded in part by the Annie E. Casey Foundation, Casebook Analytics integrates seamlessly into Casebook’s rich data and information management system.

## Making the Casebook Choice

Casebook will be flexibly integrated into your child welfare and human services environment. Agencies and providers don’t need to fundamentally reorganize to accommodate Casebook; it will be configured to meet state and local requirements.

For those agencies and departments that are ready to take a fresh look at how they do business, Casebook provides supervisors and administrators with the data necessary to successfully plan and undertake organizational change without having to request studies, query a database and wait for the response. Through Casebook, agencies will have the tools and information they need to think creatively about how they can be improving not only their own practice, but the overall effectiveness of their organization.

At a time when child welfare and human services providers are forced to make difficult programmatic decisions, Casebook can help agencies become more efficient and effective without compromising. Casebook puts the power of 21<sup>st</sup> century technology squarely into the hands of human services professionals and agencies, so that they can better serve children and families.