

# CiviCon London

## CiviCase – Case Studies

Peter Davis

Fuzion



# Clients use cases of CiviCase

- rape and sexual abuse counselling
- young people social support network
- 'warm and dry home' project
- alternative education providers
- outdoor activity safety auditing

# OutdoorsNZ: Outdoor activity safety auditing

## **Audits of organisations / businesses offering outdoor and wilderness experiences.**

Case is centred on the Organisation (which still needs some tuning)

Case commences after an initial self-audit.

The audit is an Activity - with over 150 fields - 50 issues each with 3 fields (yes we hit some database constraints!)

- one set of fields for the Auditees comments - added via webform

- one for the Auditor - to be added via the Activity - which is 'read only' at the webform

- one for Yes/No/NA which they both use.

Needed to add ability to 'File on Case' an email

30th January, 2012 8:39 AM	<a href="#">Letter and certificates</a>	Annual Review
10th February, 2011 8:35 AM	<a href="#">Client visit</a>	Audit Notes
5th February, 2011 8:34 AM	<a href="#">Report received</a>	Material
30th December, 2010 8:32 AM	<a href="#">Audit done</a>	Audit
3rd December, 2010 8:28 AM	<a href="#">Audit date scheduled</a>	Audit Notes
16th November, 2010 8:24 AM	<a href="#">New OM pdf</a>	Material
15th November, 2010 8:23 AM	<a href="#">Audit readiness</a>	Sitrep
11th October, 2010 6:21 PM	<a href="#">Annual fee payment</a>	Finance
11th October, 2010 3:27 PM	<a href="#">OM cycle 2</a>	Open Case

12th July, 2012 12:05 PM	<a href="#">AD 2</a>	Annual Review
19th March, 2012 12:00 AM	<a href="#">Application</a>	Audit Notes
5th August, 2011 6:02 PM	<a href="#">AD 1</a>	Audit Notes
23rd August, 2010 11:59 AM	<a href="#">Chat with Jon</a>	Sitrep
19th August, 2010 11:58 AM	<a href="#">Letter and certificates</a>	Certification
19th July, 2010 12:02 PM	<a href="#">Audit 1</a>	Audit
15th July, 2010 5:57 PM	<a href="#">Material</a>	Audit Notes
6th July, 2010 5:56 PM	<a href="#">Sitrep</a>	Audit Notes
22nd June, 2010 5:55 PM	<a href="#">Audit</a>	Audit Notes
21st June, 2010 12:00 AM	<a href="#">Sitrep</a>	Audit Notes
10th June, 2010 5:24 PM	<a href="#">Initial contact</a>	Audit Notes

## **Warm Fuzzies (The Sustainability Trust): 'warm and dry home' project**

Another project that has 'organisation' at the heart of the process. In this case the 'property' but the process is complex since it involves

- assessing the individuals needs
- assessing the property conditions
- dealing with Landlords, housing agencies, social workers and health organisations in terms of outcomes and funding
- tracking and following up with partners.

This case has a pre-built timeline that took several iterations to confirm

Step	Task	Initiation Activities	Role	follows	Days to complete	Offset from
1	Make appointment	Initiation	Admin Officer	Open Case	3	Step 0
2	Visit household	Assessment	Energy Advisor	Make appointment	10	Step 1
3	Send information	Assessment	Admin officer	Visit household	3	Step 2
4	Write up observations	Assessment	Energy Advisor	Send information	5	Step 3
5	Prepare action plan	Assessment	WFW coordinator	Write up observations	3	Step 4
6	Contact landlord	Assessment	WFW coordinator	Write up observations	4	Step 4
7	Send report and estimate to landlord	Assessment	WFW coordinator	Prepare action plan	2	Step 5
8	Assign household to case worker	Implementation	WFW coordinator	Prepare action plan	1	Step 5
9	Make appointment with client	Implementation	WFW Case worker	Assign household to case worker	3	Step 8
10	second Visit to client to discuss report	Implementation	WFW Case worker	Make appointment with client	10	Step 9
11	Contact landlord to follow-up	Implementation	WFW coordinator	Send report and estimate to landlord	7	Step 7
12	Evaluation	Evaluation	WFW coordinator	second Visit to client to discuss report	60	Step 10

6 February, 2012 1:47	(no subject)	Evaluation
14 May, 2012 4:41	Arrange follow-up w Angela - copy sent to Warm Fuzzies	Email
14 May, 2012 10:00	Arrange follow-up w Angela	Client follow-up visit
5 January, 2012 5:51	Arrange follow-up w Angela - copy sent to [REDACTED]	Email
21 December, 2011 11:37	Visit with Angela - copy sent to [REDACTED]	Email
8 December, 2011 1:47	(no subject)	Write report
2 December, 2011 1:47	(no subject)	Contact landlord
29 November, 2011 4:14	House assessment - copy sent to [REDACTED]	Email
28 November, 2011 11:30	House assessment	Home assessment
25 November, 2011 1:50	House assessment - copy sent to [REDACTED]	Email
7 November, 2011 1:47	Warm Fuzzies Alem	Open Case

## **Christchurch Alternative Education Trust: alternative education providers**

Currently only using the system in as much as filling in webform to create Activity and Case, and creating multiple Relationships for the 'client'.

Their clients are students who have been expelled from schools, and the organisations task is to find alternative education providers to take them on.

This involves interviews with kids, families, ex-school etc to assess the needs and then pass on to the providers to ensure placement at new provider.



# **Rape and sexual abuse counselling organisations**

Upward of 20 Activity Types such as

- Medical evaluation
- Mental health evaluation
- Forensic medical
- Police interviews
- Court case preparation and support
- Support programmes for individuals, families and groups
- Restorative justice meetings