



The Case for Goal Setting: Los Alamos JJAB Increases Funding Leveraging Data Insights

The Case:

Los Alamos JJAB, located in Los Alamos, New Mexico, provides children and families with more than a dozen critical programs, services, and resources to create a strong, healthy community.

With three core programs, including case management for children, JJAB's team realized it needed to centralize and digitize its record-keeping, which was previously contained in paper files and Excel sheets, making it difficult to follow cases. They were not effectively capturing data and had the time-consuming task of manually aggregating monthly reports for their main funder. In addition, they needed strong supporting data for additional funding sources the team wanted to explore, but no way to accurately track and use it.

Finally, tracking client success was difficult, and the team knew they needed an easier way to keep case notes.

“Using Casebook’s system has allowed us to clean up our data and provide the impact insights funders need,”

said Rachel Mohr-Richards, Executive Director of Los Alamos JJAB.

The Solution:

In 2021, the JJAB team explored several options, and were very impressed with the flexible, intuitive, user-friendly interface Casebook offers. With data in a centralized system for the entire team, JJAB is able to easily track cases for individual client support as well as create necessary reports on their measurable outcomes.

On top of this, their team discovered an additional benefit to Casebook’s configurable solution – using the software’s customizable fields, JJAB created case goals, allowing them to individualize and track each client’s goals and progress. They can also aggregate this data to quickly and effectively illustrate the organization’s wider impact. This specific, strong data is now a critical component they provide to current funders and is incorporated into new grant applications.





“It has expanded our ability to secure more grants because we can track data trends within our programs, identify where we need more support, and connect with the right funding source for that particular need.”

The Result:

From FY 2021 to the upcoming FY 2025,

the organization increased its funding by 102%

thanks to the data-tracking and reporting capabilities of Casebook.



On top of this, the team identified a service gap and expanded to support children from ages 0-4 as well as their families, offering programs and connecting them with resources – anything from mental health services, after-school activities, school resources, parent education, and restorative justice.

The infusion of new funding has translated into increased programming, expanded services, hiring staff to manage it, and a greater impact on the community.

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The Takeaways:



Goal-Setting Drives Impact and Funding:

Using Casebook’s features to customize goals on each case allows the team to easily track progress, measure success, and understand missed goals. It further supports their funders’ needs for data.



Team Efficiency:

A shared database allows the team to access records instantly, providing better service to clients and creating institutional knowledge.



Increased Programs:

The stronger data has allowed them to measure program success and gaps, identifying and applying for matching grants to support these initiatives.