Three Big Questions to Ask Your Data

- How effectively is my team managing casework and other types of requests?
- How effectively am I managing my portfolio?
- How can we visualize our success and share it with our constituents?

What You'll Need to Get Started

- **Quality data.** Reporting is only as good as the underlying data. If constituent records casework files are missing key information, these will produce gaps in reporting. To address this, create guardrails at "the point of entry" to encourage constituents and caseworkers to provide complete and accurate information (e.g. required fields, drop-down menus/checkboxes instead of text fields, etc)
- **A few good questions.** Your casework data can answer many questions and it can be easy to spend hours and hours generating new reports without knowing what matters and what doesn't. At Indigov, we emphasize reporting and analytics that *help you make decisions*. We recommend starting with a small list of plain language questions *and then* applying those questions to your dataset (see a few examples below!).
- **Regular review and updates.** Current events often lead to new kinds of casework and reporting requirements. These changes might bring changes to information you collect in each casework file (e.g. new agencies, types of requests, or required information) and new report types. Your reports should work *for you*, so changes are encouraged, but developing a process to review and approve changes will help reconcile the old with the new.

Common Reports and Metrics

Money Returned to Constituents

This is often the most impressive stat to share with your constituency and highlights the great work your constituent services team is doing on behalf of the district.

Example: "In 2022, our district staff returned $2.7mil to constituents of our district"

Required data: Indicating on each case the amount of money involved (e.g. VA benefits secured, SBA loans, IRS tax refund, etc).

"Win" Rate

In addition to "Money Returned to Constituents", you can publish the *outcomes* of your case requests.

Example: "In 2022, our district received 2,500 case requests and returned a favorable outcome for 75% of them"

Required data: Marking each case request according to outcome when work is completed (e.g. favorable, unfavorable, undetermined).

Casework by Geographic Area

Are you handling a disproportionate amount of casework from a given county or town? Is your team staffed/organized to support that? Are there regions where you need to provide more coverage (e.g. mobile office hours). Looking at casework by geographic area can help you answer these questions!

Example: "In the last quarter, 75% of our case requests have come from Mullin County, but we don't have dedicated district staff there" *or* "We aren't getting any requests from Anderson County, but we also don't do a lot of community outreach there"

Required Data: Constituent records with complete County or Town fields. (These are often provided by constitutents through the privacy release form and can also be found in L2)

Casework by Agency or Issue Type

Which agencies or issues do you handle most frequently? Do you have strong connections with that agency and/or would your staff benefit from a deep dive into those types of requests?

Example: "Our office is seeing an uptick in immigration cases but our most tenured caseworker just departed and we don't have regular contacts with USCIS in our region"

Required Data: Labelling casework according to agency and/or subagency.

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