

California State University, Monterey Bay  
**Digital Commons @ CSUMB**

---

Capstone Projects and Master's Theses

Capstone Projects and Master's Theses

---

12-2017

## Eco-Friendly and Efficient: Redesign of Friends Outside's Intake System

Nolan Balaam  
*California State University, Monterey Bay*

Follow this and additional works at: [https://digitalcommons.csumb.edu/caps\\_thes\\_all](https://digitalcommons.csumb.edu/caps_thes_all)

---

### Recommended Citation

Balaam, Nolan, "Eco-Friendly and Efficient: Redesign of Friends Outside's Intake System" (2017). *Capstone Projects and Master's Theses*. 217.

[https://digitalcommons.csumb.edu/caps\\_thes\\_all/217](https://digitalcommons.csumb.edu/caps_thes_all/217)

This Capstone Project (Open Access) is brought to you for free and open access by the Capstone Projects and Master's Theses at Digital Commons @ CSUMB. It has been accepted for inclusion in Capstone Projects and Master's Theses by an authorized administrator of Digital Commons @ CSUMB. For more information, please contact [digitalcommons@csumb.edu](mailto:digitalcommons@csumb.edu).

Eco-Friendly and Efficient: Redesign of Friends Outside's Intake System

Nolan Balaam

Friends Outside: Danielle Cariglio & Janet Garcia

Collaborative Health & Human Services

Department of Health Human Services and Public Policy

California State University Monterey Bay

December 6th, 2017

Author Note

Nolan L. Balaam, Collaborative Health and Human Services, CSU Monterey Bay.

This research was supported in part by, Janet Garcia, Agency Co-Mentor, Danielle Cariglio,

Agency Mentor, Caitlin Stinneford, Capstone Professor.

**Abstract:** Friends Outside provides opportunities for their clients to reduce recidivism and not return to their bad habits. By using an electronic form to create an efficient intake system, the organization hopes that this will increase the number of new clients. This project is being implemented through an electronic form and “walk-in” hours in hopes to better serve potential Friends Outside clients. This project’s goal is to make a positive impact on the surrounding community. Recommendations for Friends Outside include: Training Manual and expansion of training for future interns, staff, and volunteers; fully-trained staff on all office duties, and accept “walk-in” intakes during all business hours.

**Keywords:** *Casework, Recidivism, Efficiency*

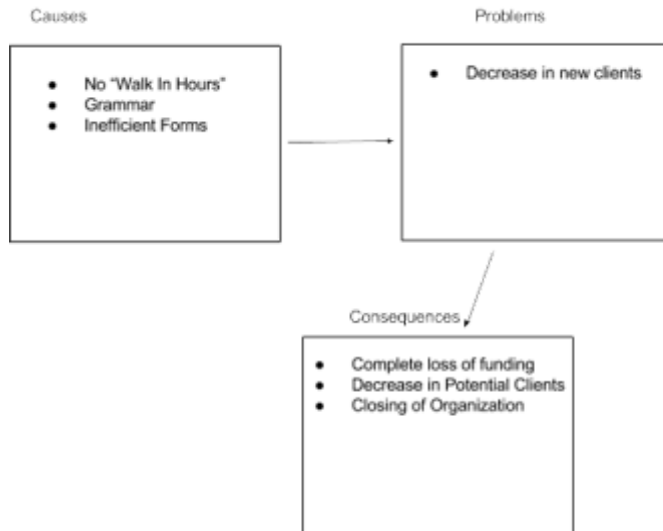
## **Introduction**

Friends Outside serves the current and post incarcerated individuals of Santa Cruz County and their goal is to help reduce the trauma of incarceration for inmates and their families, to provide information that can lead to positive change, and to assist post-release clients with their re-entry into the community (Friends Outside, 2016). Friends Outside provides services in hopes to reduce recidivism in Santa Cruz County.

California Department of Justice defines recidivism as “an arrest within three years of release from incarceration or supervision for a previous criminal conviction.” (OAG, 2017) Santa Cruz County Probation released information about a study on recidivism in Santa Cruz County in recent years. The California Sentencing Institute (2017) reported that in the year 2015, Santa Cruz County had a population of 199 per 100,000 people in County jail; California as a state is at 275 per 100,000 people. Chief Probation Officer, Fernando Giraldo, stated that 25% of the inmates in jail are repeat felony offenders and a majority have mental health and substance abuse issues. Santa Cruz County Probation is extending their services to inmates in order to connect them to appropriate resources because the first seven to nine months are crucial in the rehabilitative stage for inmates (Todd, 2017).

Friends Outside has seen a decline in the number of new clients. Friends Outside's potential clients whether they're currently incarcerated or post release, is the population that is affected most by this problem. The intake is the initial meeting between a Friends Outside case manager and a client. Friends Outside's current intake system is inefficient and not eco-friendly; from a non-profit organization and caseworker standpoint, that's a major issue. Currently, there are numerous intake forms that are supposed to serve the same purpose but they're unorganized. These forms have different formatting and poor grammar. Also, whenever caseworkers go to conduct an intake, there are an insufficient amount of forms which leads to excessive amount of copies of the wrong form or intakes are not filed properly. The electronic form is used as a replacement to the paper forms, Friends Outside could regain efficiency and organization.

According to the Environmental Paper Network, on average 45% of the paper printed in offices ends up in the trash at the end of the work day and in the U.S. the cost of paper adds up to approximately \$128 million. If the U.S. cut paper use by at least 10%, greenhouse gas emissions would decrease 1.45 million metric tons. With the collection of all of the forms, reviewing the errors, and examining the cost of paper, the development of an electronic form had begun. Within this electronic form, it automatically takes the information that is collected and inputs it into a spreadsheet and data charts which benefits Friends Outside.



### Capstone Project

The title of this project is *Eco-Friendly and Efficient: Redesign of Friends Outside's Intake System*. The purpose of this project is to make the initial intake easier for potential clients and staff, converting to paperless forms so Friends Outside can become eco-friendly, and save money on office supplies. Currently, Friends Outside is under contract with Santa Cruz County Probation and the Sheriff's Department and within that contract, there are certain requirements Friends Outside must obtain in order to be granted funds for programs. Friends Outside must meet a maximum quota of 156 new referrals per year, each needing to complete an intake with a Friends Outside Caseworker. If that quota is not met by the end of the year, Friends Outside loses funding for the next year which can negatively affect Friends Outside. Once intakes are completed, they are imputed into data spreadsheets (Excel, FileMaker Pro, Portal) so Friends Outside can stay organized and make sure Probation and Sheriff's Department is receiving data for the contract requirements. With the development of this electronic form, the implementation of Friends Outside "walk-in" hours for intakes was created. Usually intakes are by appointment only but since a majority of Friends Outside's clients are homeless and of low income

populations, client's were unable to schedule and maintain appointments. The "walk-in" hours started March 2017 and were originally on Wednesday (Watsonville) and Thursday (Santa Cruz) from 10:00am to 12:00pm but due to low attendance and staffing, the times were changed from 12:00pm to 3:00pm. This information was passed onto Santa Cruz County Probation so they could forward the information to their referrals in hopes that it will increase the amount of clients. The electronic form would be used by the caseworkers when conducting an intake.

The original scope of work goes as followed:

- |   |  |
|---|--|
| 1. Developed weekly schedule for "Walk-in" hours (March 2017) | 1. Find staff members that are available during those hours, draft of form.                          |
| 2. Probation and Sheriff Outreach (On-going)                  | 2. Advise Probation and Sheriff's Offices to pass on the information of the new hours, create flyer. |
| 3. Created electronic form (August 2017)                      | 3. Created Google Form   |
| 4. Obtain full approval of form (September 2017)              | 4. Approval from Mentor  |
| 5. Start implementing electronic form (Late September 2017)   | 5. Have staff use electronic forms with clients.   |
| 6. Collect data (October 2017)                                | 6. Examine excel data sheet from responses.  |

### **Results**

Expected outcomes for this project are number of clients increased, established a positive role in lowering recidivism rate in Santa Cruz County, reduced use of paper, and the new form is beneficial to clients and staff.

The intern expected for this project to take off within Friends Outside but with the end outcome it did not, but feels that it will just need time. Current anticipated outcomes for this project were, Friends Outside Staff will be able to efficiently *serve* their clients; with an organized intake system and “walk-in” hours, each client will be have the opportunity to receive equal treatment and be properly assisted by Friends Outside Staff, Potential Clients will be able to *prepare* for their re-entry back into everyday life; the intake is the first step potential clients are taking to better themselves for the future, through Friends Outside, they have many opportunities to reduce the recidivism rate in Santa Cruz County. The intern expected to complete all of the outcomes but throughout the process realized that there simply wasn’t enough time to truly fulfill everything set out to be accomplished. However, the intern assessed the present outcomes; with the implementation of “walk-in” hours, this did create a better opportunity for current and future clients to receive the resources given by Friends Outside staff to prepare for the re-entry of those clients. This is believed to be a strength of the project because as time goes on this project will definitely grow as Friends Outside has more clients.

The intern had many unexpected outcomes and challenges and those were inconvenient times for the “Walk-in Hours” during the week, the hours were changed during and that ended up working better for clients. Intern did not execute the advertising with Probation/Sheriff’s Department, this could possibly be a project for a future interns or volunteers. Staffing, Friends Outside has two offices within the county and it’s hard to have a set schedule of who’s at which office at a specific time and some staff members do not want to change the way things are ran in the office because it’s hard for them to make change, but Danielle, Program Manager, is currently trying to find a solution to that problem. The use of the electronic form from staff



members; due to the short amount of time given, staff members have had a difficult time adjusting to the electronic form and most prefer to use the paper form, but future interns/volunteers could possibly try and completely convert to the electronic form and get rid of the paper forms.

### **Conclusion**

This project is the first step into changing the dynamic on organization and efficiency within the office. With the improvement of the intake system, to better serve clients, is a major strength and creates an opportunity to really embrace and engage clients to getting them connected with the resources they need.

Based on results of this project and the process, the intern recommends that Friends Outside needs more outreach so they can promote their services in the community to gain more clients. They need more interns and volunteers to make up for the lack of staff within the office during work hours so there always a staff member of some sort there to assist clients with whatever they need. Expansion of trainings for interns, volunteers, and staff members so everyone is trained and fully capable of providing any Friends Outside service to clients when needing assistance so they don't have to keep coming back because a certain staff member was unable to assist them because they were out of the office at that time. Accept "Walk-in" clients during business hours and not just the "Walk-in" hours given two days of the week, so we can give clients more opportunities to receive Friends Outside services. Policy procedures in order to become more efficient while having measurable expectations of the staff, some staff members are unwilling to change to new procedures.

What the intern learned about this issue was that simply it wasn't Friends Outside's fault that there was a decrease in client numbers. There is really no one to blame, it's simply just how life works; though Probation and the Sheriff's Department refers clients to Friends Outside, they can't force them to show up and receive their services. Recidivism rates in California is extremely high and it's inevitable. Friends Outside, Probation, Sheriff's Department, and the Department of Corrections can only do so much within their power and resources to serve the current and post incarcerated population but ultimately up to the person themselves to make that change so they do not recidivate. There's numerous issues and problems within this population and what this population truly needs is to be given a chance to change their lives and change the way the world looks at them. There is a good amount of people who are in the incarcerated population whether they currently incarcerated or post, that truly do not belong there and all they need is guidance and resources so they can be given a second chance.

Professionally, the intern developed administrative skills: Working within an office setting and adapting to that environment, organization and analysis of data. Communication skills: Learning to speak and engage with diverse groups of people, adapting to professional language and inclusivity.

For future capstone students working at Friends Outside, with this specific population, or even with a non-profit organization; you must realize that you will not be able to "fix" everyone you come in contact with and you can't take things personal. In the nonprofit world, things like money from funders and other resources can change at any given moment and you need to be able to adapt to change quickly and stay positive. Future interns should find what they are passionate about within the population they're serving and really embrace it because if you don't

have a passion for what you're doing, it will make your capstone experience extremely difficult and unrewarding.

Though this project didn't feel like much and the intern was left feeling like they could have done more for their current clients and the population in which they were serving, the process throughout creating and implementing this project was unforgettable. There were so many highs and lows in the process of this capstone project, numerous moments of wanting to change the project or giving up, this was a very rewarding experience that will always be an unforgettable memory.

## References

California Sentencing Institute. *Santa Cruz County*. (2017).

<http://casi.cjcj.org/Adult/Santa-Cruz>

Increasing Paper Efficiency (2008).

<http://environmentalpaper.org/>

Recidivism in California. (2017, May 05).

<https://oag.ca.gov/dap/evaluation/recidivism>

Friends Outside. (2017).

<https://scvolunteercenter.org/programs/friends-outside/>

Todd, M. (2017, March 24). *Santa Cruz County Probation Department studies recidivism*.

<http://www.santacruzsentinel.com/article/NE/20170324/NEWS/170329804>