

# The File Is Not the Person

Part One of a Six-Part Series Sharing What Every Nonprofit Leader Needs to Know to Win in a Data-Driven Funding World



**David R. Childers**  
Chief Operating Officer, iBridge LLC



No consultants were harmed in the making of these opinions

# The File Is Not the Person

Why the data model at the center of nonprofit case management has always been incomplete and what it costs the people it was built to serve.

**David R. Childers**

*Chief Operating Officer, iBridge LLC · Straight talk about hard problems*

**N**obody set out to build a bad system. That is the first thing worth saying, because what follows is going to sound like criticism of people who are, by any honest measure, doing hard work for not enough money in service of people the rest of the economy largely pretends do not exist. Let me be clear about that up front.

But good intentions and good data are not the same thing. In the business of human services, which is what it is or whatever else we call it, the distance between what you know and what you think you know can be the difference between a program that changes a life and one that processes it.

I have spent thirty years watching that gap. I built EthicsPoint now NAVEX GLOBAL on the premise that the distance between what people inside an institution know and what the institution is willing to hear is not a cultural problem. It is a structural one. Structural problems require structural solutions. That conviction has not changed. It has just moved from the compliance department to the case management office.

## The file is not the person

Every nonprofit organization delivering health and human services knows this in theory. Almost none of them have built their data systems to reflect it in practice. This paper is about what that requires.



# HOW REPORTING BECOMES REALITY

Here is what most nonprofit organizations actually have. A client comes in. A case manager opens a file. Something happens: a conversation, a referral, a moment of real connection, or a missed one and then the case manager writes down what they remember in the time they have left at the end of a day that probably had too many clients and not enough hours.

That note becomes the record. The record becomes the report. The report becomes the evidence that the program works.

Follow that chain back to its source, and you find a single tired professional with a keyboard and fifteen other files open on the desk. That is the data model. That is the foundation on which funding decisions, program evaluations, and organizational strategy are built. Not because anyone designed it with malicious intent. Because that is how it has always been done, and when something has always been done a certain way, it stops looking like a choice. It starts looking like the weather.

This is not a story about bad actors. It is a story about how time, repetition, and institutional memory loss convert decisions into conditions. Somebody designed the intake form. Somebody designed the case

note template. Somebody designed the quarterly report. Every one of those choices was made by a person in a room for a reason that may no longer apply and every one of them, left alone long enough, has hardened into weather. You cannot petition the weather. You plan around it. You put on a coat. You stop asking whether it should be raining at all. That is the posture most nonprofits now take toward their own operating model, and it is the posture this paper is written to break.

By the time the end-of-day note becomes the quarterly dashboard, seven layers of translation have passed between the human being who came through the door and the executive who reports the outcome. Each layer summarizes. Each layer loses something. And at the top of the stack sits a clean number on a slide that can easily be mistaken for the truth.

I have a rule I have lived by for thirty years.

**“The most dangerous person in any room is the one who has confused their reporting with their reality.”**

That rule applies to the executive director reading the quarterly dashboard. When the dashboard becomes the truth rather than a representation of the truth, the organization is flying blind and does not know it.

**The file is a record of what the organization decided to capture. The person is everything else.**

In most nonprofit case management systems, everything else disappears the moment the client walks out the door.



## THE DOOR THAT ONLY OPENS ONE WAY

There is a structural condition at the heart of staff-directed case management that rarely gets named directly. So I will name it. The door to the client's experience only opens from the inside.

A client shares what they are experiencing when a case manager asks at a scheduled meeting, during a structured intake, or in a formal review. Whatever a client is feeling at nine o'clock on a Wednesday night, whatever small victory they achieved that morning, whatever quiet anxiety has been building since their last appointment, none of it enters the record unless it survives until the next time someone opens that door from the professional side.

The clinical language for this is information loss. The plain language for it is that most of what a client actually experiences in a program is never captured by the program.

I built a company around the idea that people inside institutions need a safe, structured way to tell the truth when the institution is not asking. The same principle applies here. Clients being served by nonprofit health and human services organizations have things to say that their case managers need to hear. They have progress to report. Setbacks to flag. Feedback to give. This vital information, which needs to be expressed, does not conveniently fit around a monthly appointment schedule.

This is not a scheduling problem. It is a power problem.

The data model is a power structure. When one party controls the record, decides what and when it gets captured, in whose language, through whose lens the record reflects that party's reality more faithfully than it reflects any others. In traditional case management, that party is the organization. The client's story exists in the system because a professional put it there. The client has no standing to correct it, add to it, or tell the parts of it the professional did not know to ask about.



**“Data is not neutral. It is a representation of whose voice shaped the record and whose interpretation decided what mattered.”**

Expanding the user model to include clients, their guardians and supporters, their external providers, and the full spectrum of organizational staff does not simply add users to a platform. It redistributes the power to define what is known. That is not a small thing.

**A client who just got a job offer does not have to wait to share that news until next Thursday's appointment.**

The client-facing expansion of Kairos IMS is built on a deceptively simple idea. Open the door in both directions. Not just better prompts at better times, though that matters too. The more fundamental shift is that the client no longer needs a prompt at all. They can initiate. They can reach out on their own schedule, driven by their own sense of urgency or readiness. A client who is struggling at midnight does not have to wait for someone to create a space for them to say so.

The platform gives them a standing invitation that never expires. What they do with it is up to them. But the door is open. And it opens from both sides.

Organizations that build on that foundation make better decisions, advocate with stronger evidence, and identify clients falling through the cracks before those cracks become crises. That is not just good data architecture. It is a more honest model of how human service actually works.

## WHY THIS MATTERS RIGHT NOW

I am going to be direct about the environment we are operating in, because the people reading this paper are already living in it and do not need it softened.

Government-dependent nonprofits are among the most structurally vulnerable organizations in the current funding landscape. Federal budget pressures, grant reductions, and the contraction of public funding streams are not future risks to be monitored. They are present conditions to be managed. The voices making this observation are not confined to policy journals. They include prominent figures in the business community who have named government-funded nonprofits specifically as organizations at existential risk if they cannot demonstrate measurable outcomes.

The nonprofits that will navigate this environment are not necessarily the largest or the best-connected. They are the ones who can demonstrate with evidence that their programs work. That the dollars invested in their services produce documented, measurable change in the lives of the people they serve.

**“You cannot demonstrate outcomes you did not measure. The file is not the evidence. It is just the file.”**

Case notes, headcount, and institutional memory are not a reporting infrastructure. They are what organizations use when one is not available. Performance-based contracts and outcome-linked grants require something else entirely, and the gap between what most nonprofits have and what those funders expect is widening every quarter.

**The organizations building data infrastructure today are the ones that will be able to answer the questions funders are already asking.**

The ones that are not will spend the next funding cycle explaining why they cannot.

# About the Author

*David Childers has spent his career building systems that give people a voice inside institutions that weren't designed to hear them. As President of Oregon Scientific, he led the company's research partnership with the MIT Media Lab, his first sustained look at the distance between what institutions are told and what they could actually know. He spent the next two decades in compliance technology, founding EthicsPoint now Navex Global, which has become the backbone of workplace ethics and reporting infrastructure for thousands of organizations worldwide. He built that company on a single premise: that the gap between what people inside an institution know and what the institution is willing to hear is not a cultural problem. It is a structural one. Structural problems require structural solutions.*

*The last fifteen years have been a different application of the same conviction, this time for the organizations delivering health and human services, and more importantly, for the people receiving them. He is COO of iBridge LLC and the driving force behind Kairos IMS. He grew up in Oklahoma. He learned in a pool hall and a boardroom. He has spent hours in both and values what he has learned. He writes from experience. Not from a whiteboard.*



[david.childers@ibridgellc.com](mailto:david.childers@ibridgellc.com)

## About Kairos IMS

Kairos is an innovative Impact Management System designed to revolutionize the way human-serving nonprofits and social impact organizations operate. By reducing administrative burdens and enhancing interactive care, Kairos IMS enables organizations to leverage technology to increase agility and deliver seamless service.

Kairos IMS was created through a powerful collaboration between [Impactful](http://www.impactful.com) LLC and Microsoft, two teams deeply invested in helping nonprofits do more good. [www.impactful.com](http://www.impactful.com)