Trendex in Sonoma County's Human Services Department: Implications for San Mateo County

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EXECUTIVE SUMMARY

A picture can be worth a thousand words as it intends to capture a point in time that can be significant and/or time-sensitive. A picture, or snapshot, as it can be called, can bring about praise or it can stir-up change. Sonoma County Human Services Department has put forward a snapshot of the agency's performance and outcomes. The snapshot sometimes elicits praise for its employees' outstanding performance, while other snapshots elicit conversations on what needs to change.

Sonoma County has dedicated endless hours to building a data report that speaks to not only about the amount of work the county was responsible for, but also how efficient it was in handling the work. It was important for Sonoma County to collect data that would support forward-thinking decisions. The data collected needed to be consistent and be presented in a single report rather than trying to make sense of various reports. In addition, the county strived to have the report accessible to the agency director and to management as a whole. This is how Trendex was born.

Trendex serves as a data hub for all departments in the Sonoma County Human Services Department. It provides information on application processing, performance evaluations, staffing resources, census data, and many more items. The data are presented in a consistent manner across all departments and carry a strong value amongst all employees. Trendex is a tool used to gain better understanding of what has worked well across the years and what needs to be modified. Also, Trendex is a great tool to make supported projections of needed resources.

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Introduction

Understanding where a county stands is important in order to make executive decisions that impact stakeholders. Day after day, counties across the state work towards making public assistance programs accessible to those in the community. Some counties place their focus on increasing outreach strategies while others focus on increasing staff in order to better manage the influx of client participation. Though both approaches are necessary to be successful, it is important to know where the county stands as a whole and whether or not it has the resources to assist clients. The following questions are imperative in order to begin understanding the flow of client participation and what is needed from the county to support its clients:

- What is the average number of incoming applications?
- Which public assistance programs have the highest demand for services?
- What languages are being accessed?
- Which entry points are being used to apply (in-person/on-line)?
- What is the amount of time needed to reach a case disposition?

In order to adequately answer the above questions, the gathering of data is crucial to obtain a clear picture of what approach is needed to operate. Tara Smith, Program Development Manager of Sonoma County Human Services Department, knows this first-hand as she serves as the Data Champion for the county. Mrs. Smith shares that the county's former agency director, Jo A. Webber, dealt with numerous data reports for all the various departments but desired a single report that would provide a snapshot of the agency's operation. For this reason, Trendex was created and has evolved throughout Sonoma County. Trendex was created with the intention of giving management a high-level overview of how day-to-day operations were being managed without necessarily focusing on a punitive intent.

For instance, the Economic Assistance Department's Trendex report gathers data on monthly incoming applications, programs requested, application timeliness, application dispositions, the amount of support services provided, and staff allocation numbers. Other departments, such as the Human Resources Department's Trendex report, gathers data on the number of new hires, promotions, performance evaluations, execution of program training, and client advocacy requests. With the above said, Trendex is a quantitative report that measures the number of occurrences of a specific function within the various departments. It assists management in gaining a snapshot of the department's operation and whether or not it is meeting the established benchmarks.

In addition, Trendex is a running data report that is able to provide historical operations data that documents the progression or regression of certain programs and projects. Trendex also allows management to start the conversation about forward-thinking decisions. For example, George

Malachowski, Program Planning Analyst, shared that Trendex Census Edition was used to start a conversation about the potential resources that would be needed during Affordable Care Act implementation based on the county's specific needs. Trendex Census Edition concentrates on specifics related to employment, education levels, housing, economic status, health insurance access, and household characteristics. These components allowed for supported projections on how to adequately staff for new program rollouts. It is important to understand that the data alone does not result in decisions but initiates the conversations amongst stakeholders on what is needed to move forward to provide the necessary services to the community.

Importance of Data Gathering

The majority of the Trendex report data is derived from already existing program reports that are submitted to the state. The state gathers data from all 58 counties in order to create a state data dashboard. This allows the state to look at which counties have a strong handle on program operations versus those that are struggling to keep up. The data dashboard also allows for data trends to be visible and bring about possible training or further policy clarification. This also holds true for the rationale behind Trendex.

Trendex serves as a depository of data from across all departments. Trendex Human Services Department Main serves as a department-wide report that provides a high-level overview of all departments under the agency director. Jerry Dunn, Director of Sonoma County Human Services Department, has shared how he carries Trendex data with him as he goes from meeting to meeting. He values the ability to have quick access to data especially when questions arise amongst colleagues and state meeting discussions.

Management and staff in general across Sonoma County departments have bought into Trendex. Tara Smith and her team have developed tailored Trendex reports for all departments. The individual

reports drill down to more specific and focused program development data that help management set expectations and enforce proper follow-through with data that reflect a downfall of production. It is vital for management to have a clear picture of potential production deficiencies even before they start. This allows for a potential request of additional resources to the developing issue. In addition, Trendex builds accountability across departments. Each management team is responsible for sharing its respective Trendex report with supervisors and line staff. It is expected that data reports are discussed and that strategies are developed to meet the established benchmarks.

Challenges

Trendex was created with the sole intention of having one data report that would provide a snapshot of Sonoma County's operations. The directive was given by the former agency director to find a way to collect raw data and turn it into a report that would allow management to view emerging trends and deficiencies. Tara Smith and her team were tasked with creating a comprehensive quantitative data report that would provide the agency not only with statistics, but also with data that created a meaningful linkage to outcome-based performance and strategic planning.

Ms. Smith has been responsible for creating and maintaining Trendex. She has had a full investment in Trendex and knows the complexities of the report. As Ms. Smith has now been promoted to a new department, the question now is who can possibly keep Trendex alive? Ms. Smith reports 25 hours/monthly are used to maintain the report, while Kristie Gutierrez, Administrative Aide, uses 40 hours/monthly to review and publish the Trendex reports. Sonoma County has looked into possibilities of Trendex automation but there is no definite timeframe of when and how it would occur. In addition to the need of automation, a Trendex Champion is needed to deal with the potential data discrepancies, report validation, and ad hoc requests.

It is understood that Trendex serves as a valuable resource to the county; but it is also important to allocate resources elsewhere in order to meet established benchmarks.

San Mateo County

San Mateo County is always looking at methods to improve the experience of its clients by adopting new ways to deliver services to internal and external clients. The county has modernized its lobbies and continuously works with outside agencies to gather feedback on how to improve service delivery. The county desires to reach out to every neighborhood within it to increase program participation in order to achieve self-sufficiency. Nonetheless, it is important for San Mateo County to have access to historical and current data trends that tell the story of its programs and the population it serves. It is important to know what are the specific needs and barriers that must be addressed in order to meet the goal of a self-sufficient county.

Trendex is a valuable and powerful tool that can be adopted in San Mateo County to start the conversation about strategies to better serve its population. Trendex can also address the need for accountability and consistency across all departments within the agency. The county needs to be able to acquire internal data that matches state and federal data reflective of the county's performance. In addition, consistent and reliable data needs to be available at all times in order to make forward-thinking decisions based on data trends. Data that can be found in one report is preferable to trying to gather information from various reports that do not always support each other.

In order for San Mateo County to adopt Trendex, the following items would need to be adopted:

- **Trendex Automation:** Pursue the possibility of automating the data report to reduce the hours dedicated to updating and maintaining the report. San Mateo County has limited staff that can be dedicated to manually gather and input data on a monthly basis.

- **Data Champion:** Assign a data expert that would be responsible of dealing with the report's data discrepancies, validations, and ad hoc requests. This person would provide approval of the data releases to the respective departments.

- **Management Buy-in:** Pursue piloting the Trendex report amongst selected departments to demonstrate comprehensive, consistent, and applicable data can be used to effectively monitor performance.

- **Department Liaisons:** Assign department contacts that would serve as the subject matter experts within their own departments. These contacts would work together with the Data Champion to resolve discrepancies and modify reports based on the departments' needs.

Acknowledgments