

# Transforming Data into Action

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## EXECUTIVE SUMMARY

Data are often used to measure the effectiveness of government programs and to assist administrators in deciding how to spend limited resources. Data are also used to improve programs and services and to drive decision-making. The Sonoma County Human Services Department (HSD) utilizes data to assess workload, outcomes, staffing, and fiscal environments.

The evaluation of Trendex, the comprehensive data report of HSD, was driven by a desire to understand how data are collected and reports generated to provide a picture of HSD operations; identify the sources of data and how they are analyzed; and implement a standardized data collection system for Contra Costa County Employment and Human Services Department (EHSD).

The findings of this evaluation determined the importance of Trendex at HSD, which is articulated throughout the department and supported by

all levels of management. Managers utilize Trendex reports often, and the data is reviewed, monitored, and assessed monthly. Stakeholders regularly define objectives, identify new data elements, and track trends.

Contra Costa County Employment and Human Services Department (EHSD) has a goal of creating an organization that uses data to make informed decisions. One method for achieving this goal is to establish a data unit. Yet, implementing a data unit alone will not “build a data-informed agency that practices data-informed decision making” (EHSD Strategic Initiatives). The data collected must be consistent with the department’s strategic initiatives, goals, and desired outcomes. The data unit must be supported by all levels of the organization, and all EHSD employees must be trained about the importance of accurate data and how their daily activities contribute to this desired outcome.

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## Introduction

Author and former educator Dr. Mike Schmoker stated, “Things get done only if the data we gather can inform and inspire those in a position to make a difference.” This quote can be applied to Sonoma County Human Services Department (HSD) and its use of Trendex, a comprehensive data report that is produced monthly and features key data points related to department operations. The desire of HSD to enhance and improve agency operations is evident by its utilization and reliance on Trendex. These comprehensive reports are used by all levels of management, from the department director to program managers. As the decision-makers, HSD management uses Trendex to implement changes and improvements, and to increase operational efficiencies.

While visiting HSD, it was clear that Trendex was its own brand. It was also clear that managing department performance through data is a priority. Managers determine what they want to measure, how to obtain the information, and why it is important. They also work directly with the evaluation analyst to discuss data elements and how to present the information. Once the data are reported, they use it to make informed business decisions.

The primary goal for researching Trendex was driven by a desire to:

- Learn how data are collected and reports generated, and how that information provides a picture of HSD operations.
- Identify the sources of the data and how the information is analyzed.
- Learn how to implement a system in EHSD that will be responsible for collecting data and producing monthly reports regarding workload, outcomes, staffing, and fiscal operations.

## Background of Interest in the Program or Process

Many human services agencies have recognized the importance of collecting and analyzing data regarding their services. As budgets decrease and tax payer scrutiny increases, government agencies realize that managing operational performance and increasing efficiency is imperative. Many agencies have responded by implementing data solutions that allow them to assess, analyze, and evaluate information. The data are also used to improve the quality of services and identify trends in order to respond appropriately.

Contra Costa County Employment and Human Services Department (EHSD) operates in a data-rich environment with reports developed and distributed for various divisions, functions, and purposes. However, there is no department-wide compilation of the data, and key data points regarding operations and outcomes differ. As a result, EHSD established a goal of building “a data-informed agency that practices data-informed decision making” (EHSD Strategic Initiatives). One of the strategies to achieve this goal is to establish a data unit; the measure of success is “using data and technology to their best advantages to promote sound and ethical decisions, accountability, and informed decisions.”

The data unit will be responsible for gathering, analyzing, and producing reports related to department operations. The unit will also be responsible for identifying key data points related to workload, outcomes, staffing, and fiscal operations. The information provided will be used by EHSD executive and leadership teams to make decisions about programs, services, staffing, and budgeting, and to provide a comprehensive picture of the department’s operations. While it may take some time to fully

develop the data unit and identify the specific outputs needed for all levels of management, the department has begun taking steps to establish the unit and a workgroup is actively working to achieve this goal.

### **History of the Development of the Program or Process (Sonoma County)**

In 2008, Sonoma County HSD established a data division, and a division director position was created to direct the functions of the unit. One of the tools developed by this division was Trendex. The original intent of Trendex was to look at the services offered by HSD and to provide a global picture of how the divisions were performing. Today, each of the HSD division directors use Trendex to help them identify trends and inform operational decisions.

Prior to the development of Trendex, HSD managed by anecdote. There may have been assumptions about caseload growth or reductions, but no real way to support that assumption. With the implementation of Trendex, HSD is able to assess and analyze monthly data and trends regarding its programs and services. Managers use the reports to motivate staff, and for annual budget preparation. It is also used to tell the story about HSD operations, and how the services it provides impact Sonoma County.

While some divisions have their own reports that provide detailed information, an executive summary is produced monthly. The executive summary provides data for 13 months, as well as information regarding how operations have changed over time. The department director utilizes the data in the executive summary for various reasons including media inquiries, budget preparation, and to provide program information to the Sonoma County Board of Supervisors. For example, the department director was able to justify the need for a new General Assistance (GA) position in Supplemental Security Income (SSI) Advocacy by using Trendex. By using the trend data, the department director was able to show the Board of Supervisors why the position was necessary. Another example was an analysis of the number of In-Home Supportive Services (IHSS)

customers who are also receiving CalFresh. An analysis of the data determined that the number was very low, and it was decided that Sonoma County needed to increase participation. Once the baseline was established, Sonoma County made program changes to increase the number of IHSS customers receiving CalFresh.

### **Key Elements of the Program or Process**

There are several key elements of Trendex. These elements include having a champion for the data; accessibility of the reports; centralization and standardization of Trendex; utilization of the reports; a human resources (HR) report that provides information on the many areas of human resources management; and a supplemental report that is used to tell the story behind the numbers.

The HSD department director is a champion for Trendex; he utilizes the information in the executive summary, and encourages management and supervisors to use it as well. Additionally, the executive team discusses the report and periodically drills down on specific subjects.

Trendex is accessible to all HSD staff as it is posted on the Intranet each month. Staff at all levels of the organization can access the reports, which can also be accessed in iBooks. Supervisors also have access to workload reports for each of their employees, which they use during staff conferences.

The Trendex data is produced monthly by the HSD program planning evaluation analyst and an administrative aide. The analyst and aide compile the data, and review, format, and ensure the reports are standardized. Additionally, the analyst meets with managers as often as needed to discuss data elements. Changes are highlighted each month, making it easier for readers to identify.

The information in Trendex is used for many different purposes. Management has used it for media inquiries; employee productivity and motivation; decision-making about programs and services; budget preparation; and recognition of trends. It has also been used to justify staffing needs and for program audits.

The Trendex HR report helps operations determine staffing and recruitment needs. Data regarding turnover and attrition, recruitment, investigations, employee movement, leaves of absence, and workers compensation injuries are all reported and updated monthly.

Finally, the Trendex supplement tells the story behind the numbers. Produced quarterly and for a specific topic, data are gathered, information is analyzed, and the analysis is presented to the executive team. The supplement “is designed to increase knowledge and understanding of several HSD program areas through an in-depth drill down of information.”

### **Success of Trendex**

Trendex has become an integral part of HSD operations. The reports are utilized regularly to recognize trends and to assist in making operational decisions. Because accurate data are important throughout the department, managers often determine additional data elements that need tracking and monitoring. Trendex data are often referenced when discussing the need to implement new programs, modify existing programs, or budgeting for a new program or service. Data are also used to support or oppose the need for change, and to evaluate how programs and services are impacting the greater community.

### **Recommendations for Contra Costa County**

Trendex reports are a comprehensive tool that HSD utilizes and continues to modify to meet its business objectives. While the information in the report is important to track, the standardization and compilation of the data can be time consuming. However, the organizational structure and staffing of HSD allow for the centralization and standardization of these reports. Additionally, there is a person in the agency who stresses the importance of Trendex, and this priority is filtered down to all levels of the organization.

As EHSD works to establish a data unit, benchmarking against other agencies that have similar units, identifying best practices will be necessary.

Additionally, EHSD must consider how to staff the data unit, and the types of classifications needed. The creation of a data unit will increase department costs due to the increased staffing and equipment needs. However, the department may eventually realize a decrease in other departmental expenses due to increased efficiencies.

Additionally, EHSD can learn from HSD and the process it used to establish a data division. EHSD can review the Trendex reports to see what types of information HSD collects. However, it will be important for EHSD to determine what to capture and ensure that it is consistent with the department's strategic initiatives, goals, and desired outcomes. It will also be important for EHSD to determine how to tell the story behind the numbers.

Even with the implementation of a data unit, an essential element of delivering quality services and using data and technology to promote sound and ethical decisions is the involvement of all EHSD staff. Employees throughout the department must be trained to understand the importance of accurate data and how their daily activities contribute to desired outcomes. The department's strategic goals and initiatives should be articulated throughout the department to ensure that all employees recognize and understand the goals. Additionally, staff should be involved in selecting data elements, and be informed of how to use the data.

### **Conclusion**

The assessment of Trendex began with a goal of learning what to track and analyze, and how to collect data in order to provide a comprehensive picture of the department's operations. However, it was discovered that in order for an accurate and comprehensive picture to be formed using data, stakeholders at all of levels of the organization must be involved in the process.

By establishing a data unit that is tasked with producing reports about EHSD operations, the department will be closer to achieving one of its strategic initiatives. However, this unit must be supported by the programs, and the data must be

accurate and verified. Additionally, these data must be used to make decisions about programs and services, and help to increase operational efficiencies.

HSD implementation and utilization of Trendex provides a path that EHSD can follow as it establishes a data unit. Not only are key data elements identified, but the process used to obtain the data can also be utilized. Yet, EHSD must recognize that the success of Trendex is not in the numbers, but in the utilization and support for the data division and the reports that are produced on a monthly basis.

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