

Using Solano County's Public Assistance Daily Dashboard to Weather the COVID-19 Pandemic and Beyond

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EXECUTIVE SUMMARY

The Marin County Health and Human Services (HHS) Department's vision is simple but mighty: "All in Marin Flourish." HHS does this by nurturing a learning culture that strengthens its services through program evaluation and continuous quality improvement. The Solano County Health and Social Services Department Employment and Eligibility Division is a data-driven leader in the county after developing an internal-facing dashboard that tracks macro-level program and operational

metrics needed to evaluate the agency's performance and client outcomes.

Marin County HHS' ongoing continuous quality improvement initiatives and racial equity work would be boosted by adopting a dashboard similar to Solano County's Public Assistance Daily Dashboard, starting first with the Marin County HHS Public Assistance branch and later using the model to develop similar internal-facing dashboards throughout HHS.

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Introduction

The Marin County Health and Human Services (HHS) Department consists of five divisions: (1) Planning and Administration, (2) Behavioral Health and Recovery Services (BHRS), (3) Public Health, (4) Social Services, and (5) Whole Person Care. The Social Services division in particular is composed of multiple branches, including Public Assistance, Children and Family Services, Employment and Training, Adult and Aging Services, West Marin Multi-Services Center, Public Guardian, and Veterans Services. Building a learning culture through continuous quality improvement and program evaluation in a department as large as HHS has been an ongoing effort, sometimes challenged by successive natural disaster responses.

With the emergence of the COVID-19 public health emergency in March 2020, the need for transparency has grown. Data requests have become frequent, including from the Board of Supervisors and the general public, all wondering about our racial equity efforts and how HHS' services are impacting the Marin community. HHS' ability to offer transparency and evaluate our services for continuous improvement has been challenged with information dispersed throughout the agency. Developing a centralized internal-facing dashboard that documents important agency metrics would be a helpful tool for the department as it continues to navigate the public health emergency and beyond.

Background

The Solano County Health and Social Services (H&SS) department is composed of various divisions, including Employment and Eligibility Services (E&E), Behavioral

Health, Public Health and Health Services, Older and Disability Services, Child Welfare Services, and Administration. The E&E division employs 415 full-time employees and is responsible for administering Medi-Cal, County Medical Services Program (CMSP), CalFresh, CalWORKs, General Assistance, and Welfare to Work programs.

In October 2019, the E&E division hired their new Deputy Director, Marla Stuart, after a long recruitment process. Prior to this, Stuart had extensive experience in data science, including designing and developing Sonoma County Human Services Department's *Trendex*, a monthly infographic with hundreds of indicators from dozens of data sources. After assessing the needs of the E&E division, Stuart discovered that data sources were dispersed in multiple locations, making it challenging to evaluate the division's performance.

In March 2020, everything changed with the COVID-19 pandemic, and the need to quickly consolidate and centralize data sources to evaluate the agency's performance became crucial. Workloads increased dramatically. Staff and the community were getting sick. Managing public assistance programs in the face of a global pandemic required knowing what the workload was and what staff members were available to take applications. In response, Stuart appointed the division's strongest data-oriented employees to quickly develop their *COVID dashboard*. First beginning with tracking “attendance” as work shifted to a hybrid remote/in-office model, Solano then began tracking “applications received,” “applications determined,” and “pending applications.” In time, the COVID dashboard became the *Public Assistance Daily Dashboard*.

Public Assistance Daily Dashboard

The Public Assistance Daily Dashboard centralizes macro-level E&E data to track program metrics and trends and promote transparency among staff and the department. At the present time, the dashboard tracks the following datasets:

- Attendance
- Applications Received
- Applications Determined
- Applications Pending
- Active Programs
- Continuing SAR 7s (semi-annual reports)
- Continuing RRRs (recertifications and redeterminations)
- Triage Calls and Lobby Visits by Office
- Benefit Action Center Call Center Data
- Fiscal Issuances and EBT Cards Issued
- Clerical Data (including applications submitted, applications registered, and application backlogs)
- Heat Map of Solano County showing application volume by city

Developed using Microsoft Excel, the Public Assistance Daily Dashboard contains current and historical information for each dataset back to January 1, 2020. The dynamic dashboard includes graphs, pie charts, and pivot tables to display agency data and draws upon multiple data sources, including:

- Fifteen different daily Exemplar reports
- A daily CalWIN internal pending application report produced by Solano's Department of Information Technology (DoIT)
- Internal reports such as

the Master Attendance Report, Daily Data Summary Report from Clerical Bureau, and Daily Data Report Summary from the Benefit Action Center

- Fiscal reports including Food Stamp Benefit Issuance Report and Monthly Care Issuance Report

The dashboard is updated daily and shared on the department's internal SharePoint page for all E&E division employees to see and use.

Dashboard Maintenance and Financials

The Public Assistance Daily Dashboard is maintained by one full-time H&SS Planning Analyst. The H&SS Planning Analyst currently spends approximately one hour per day maintaining and updating the dashboard, including receiving data sources and cleaning, validating, and merging the data in Excel. The rest of their time is spent working on other data projects as well as automating the Public Assistance Daily Dashboard.

Due to the limitations in reporting functionality in CalWIN, Solano's current eligibility determination software, the county has procured a contract with Exemplar Human Services to perform ad hoc reporting. The Exemplar contract is funded through Medi-Cal and CalFresh allocations.

Using the Dashboard to Navigate through the COVID-19 Pandemic

The Public Assistance Daily Dashboard as a

tool proved to be highly effective at navigating the division through the COVID-19 public health emergency. For example, during the division's Live All-Staff meetings, the dashboard was prominently featured as a tool for transparency and healthy competition. Showing the increased workload visually on the dashboard validated staff's "COVID fatigue" and engendered a sense of unity and camaraderie across the division. It also provided an opportunity for staff to see their work and labor in the dashboard's data.

Featuring the dashboard during Live Staff Meetings also provided the opportunity to promote healthy competition amongst staff. For instance, when the total overdue pending applications were high, Stuart challenged staff to a bureau-off to see which unit could process the most overdue pending applications. After the challenge was issued, the dashboard started to show the overdue application data trending downward.

In addition to featuring the dashboard in Live All-Staff meetings and displaying it on the E&E division's SharePoint page, the dashboard is also used throughout the agency to evaluate general operations and service delivery models, including:

- Tracking timeliness of assigned areas and units
- Encouraging discussion about data validity and providing an opportunity to troubleshoot data discrepancies
- Determining the current workload, including how many people are applying online, by phone, in person, etc.
- Assessing what offices have the heaviest foot traffic and making appropriate staffing

adjustments as needed

- Evaluating what areas need improvement and reprioritizing efforts
- Organizing outreach efforts based on the dashboard's heat map
- Identifying and celebrating successes and encouraging staff to process work timely
- Creating goals and issuing "bureau-off" challenges
- Breaking down silos by promoting data transparency and increasing communication, collaboration, and teamwork to meet shared agency goals

Leading Up in a Rapidly Shifting Environment and Beyond

The E&E division's Public Assistance Daily Dashboard showcases how one division can lead in a large organization by centralizing and visualizing current and historical data and using the information to advocate for additional resources. For example, E&E acquired additional staffing positions by demonstrating a sharp increase in workload and demand on public assistance programs as a result of the COVID-19 pandemic. In addition, the E&E division used the dashboard's attendance tracking data to demonstrate that staffing levels and productivity were not affected by the switch to remote work and advocated to secure permanent hybrid work arrangements. The E&E division intends to continue expanding the Public Assistance Daily Dashboard to include datasets such as:

- Housing data
- Housing Support Program data
- Hiring data (e.g., vacancies, positions filled, etc.)

- Equity data (e.g., demographics, disparities in denials by demographics, etc.)
- Disability data
- Homelessness data
- Lists data (e.g., PVS, NHR, etc.) to highlight the additional responsibilities Public Assistance branches have for the programs they administer

While the expansion of the Public Assistance Daily Dashboard will bring further useful information, it is not without its challenges.

Challenges and Considerations

The Public Assistance Daily Dashboard is dynamic and informative; however, it also comes with some challenges. At present, the dashboard is maintained by one employee. The updating of the dashboard is partially automated and partially manual, which means it takes employee labor and time to maintain the dashboard. If the H&SS Planning Analyst is out of the office, the dashboard is not updated timely. The potential for human error can also occur as a result of the multiple sources that work together to make the dashboard. For example, the dashboard is a mixture of Exemplar and internal reports and is maintained by one employee. In addition, E&E works with the DoIT to generate a daily CalWIN report. While having a relationship between E&E and DoIT divisions is important, it can be challenging to communicate when both divisions speak different professional languages. At any level, a human error can occur, which is why data validation is so crucial to the dashboard's integrity.

With many different data sources already comprising the dashboard, the limits of Microsoft Excel are challenged and

stretched as other data elements and metrics are slated to be added. Although Solano County purposefully chose Microsoft Excel to build its dashboard because of its accessibility, cost, and dashboard capabilities, it remains to be seen how much further it can expand to accommodate the growing historical data and additional datasets.

Lastly, Solano's dashboard is based on data generated from CalWIN, Solano's eligibility determination software. In June 2023, Solano will migrate to CalSAWS, the eligibility determination software replacing CalWIN. There are many unknowns for the department as it nears CalSAWS migration in June 2023. Will CalSAWS have the information needed to maintain the dashboard? What additional ad hoc reporting functionality (if any) will be needed to capture historical data after CalSAWS migration? Does CalSAWS have built-in dashboards that may supplement or replace the Public Assistance Daily Dashboard? As CalSAWS builds new functionality, what the system will look like at Solano's CalSAWS migration leaves many unknowns for the future of the Public Assistance Daily Dashboard.

Recommendations for Marin - You Have to Start Somewhere

Marin HHS can benefit from adopting a model similar to Solano County's Public Assistance Daily Dashboard by starting with the HHS Public Assistance branch. Before Marin's own CalSAWS migration, data sources were scarce and unreliable, and ad-hoc reporting was limited. Since Marin's CalSAWS migration in 2021, a new set of data tools has been made accessible through CalSAWS Business Intelligence dashboards. The level and quality of data available at no

additional cost within the CalSAWS Business Intelligence dashboards mirrors the data collected by Solano County's Public Assistance Daily Dashboard. It is recommended that the Marin HHS Public Assistance branch start small, identifying one staff member with CalSAWS Business Intelligence access and coordinating with the Measurement, Learning, and Evaluation (MLE) team to develop infrastructure to display crucial Medi-Cal metrics such as applications received, applications determined, pending applications, overdue applications, Medi-Cal CalAIM pre-release data, and Medi-Cal enrollment to start. As the process is fine-tuned, additional staff can be recruited and trained to include data for CalFresh and CalWORKs programs, Call Center and lobby information, and racial equity data (specifically disparities in application outcomes by race and ethnicity).

Starting with Medi-Cal is a strategic choice at a time when Medi-Cal enrollment is challenged by the winddown of the COVID-19 public health emergency flexibilities and the possibility of many Medi-Cal beneficiaries losing coverage when said flexibilities are lifted. Transparency about Medi-Cal application and enrollment data across HHS is crucial, largely because multiple divisions within HHS serve Medi-Cal clients, including Whole Person Care, BHRS, Public Health, Adult and Aging, Children and Family Services, and many more. Transparency around Medi-Cal application and enrollment data provides a tool for each division to work together to break down silos as well as coordinate efforts to help Medi-Cal beneficiaries maintain coverage and continuity of care.

Once the Marin County Public Assistance Dashboard is developed, the department can use the framework to establish dashboards in

other branches, one branch at a time. Each branch can designate a point person who can work with the MLE team to identify relevant metrics and develop infrastructure to establish the branch's own internal dashboard. Once this process is fine-tuned and incorporated into the branches' workflow, the information can be added to the HHS Hub SharePoint page and repeated with another branch. As new dashboards are added, the information can be socialized at HHS All-Staff meetings and HHS Management Forum and can also be promoted in the HHS monthly newsletter.

Timeline for Recommendation

It is estimated that the development of the prototype Marin County Public Assistance Dashboard would take approximately one month. The initial lift will include collaboration between the MLE team and the Public Assistance point of contact to develop the data infrastructure, identify metrics, establish a historical data starting point (baseline), and create a workflow for updating the dashboard. To start, maintenance would occur weekly and would require approximately one to two hours per week to receive data sources, validate the information, and update the dashboard.

Staffing Needed

It is recommended that one person per branch be the point of contact for their branch's respective dashboard and be responsible for updating it on a pre-established timeframe. The point of contact would work closely with the MLE team to identify metrics, data sources, and construct the dashboard as well as create a dashboard job aid for successors and backups. In addition, the point of contact will work with the Information Services and Technology (IST) department to update the

dashboard on the HHS Hub SharePoint page based on a pre-set update frequency. The points of contact, MLE team, IST, branch heads, and Executive Teams can periodically meet to discuss the dashboards, including adding additional metrics that may be useful for the department.

journey. I am truly grateful for this experience.

Conclusion

Marin HHS has a unique opportunity to learn from Solano County E&E's division to promote transparency in our services. The public demands it. The Board of Supervisors demands it. HHS can easily offer transparency in our services by consolidating branch data into an internal-facing prototype dashboard and replicating the process throughout the agency, one branch at a time. In addition, HHS can begin collecting racial equity data by branch in support of the county's Race Equity Plan and use this information to refine our service delivery model more equitably.

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