

Putting Your Data to Work

An Open Forum Discussion on The
Trips and Traps of Data Mining

Family Services of Greater Houston

Keith Rea

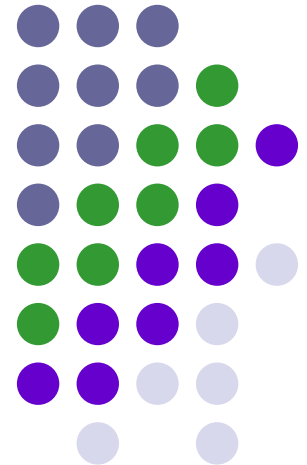
Vice President of Operations

Josh Reynolds

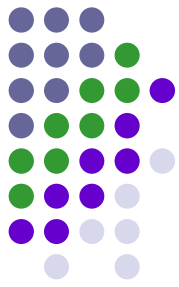
Manager of Program Development

Liz Shaver

Coordinator of Grants Development

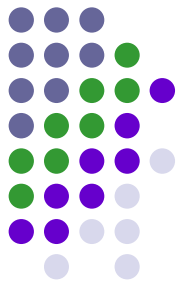


History - 1989



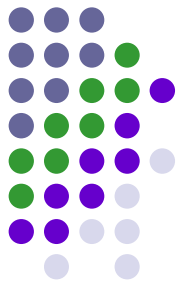
- First technology manager hired
- Three employees counting clients/services manually
- Service delivery reports introduced

History - 1991



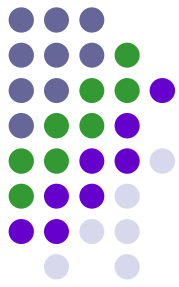
- Introduced first PC-based data collection tool
- Modified inventory control system
- Daily entry of faxed, handwritten “Daily Activity Report”
- Direct service staff only

History - 1999



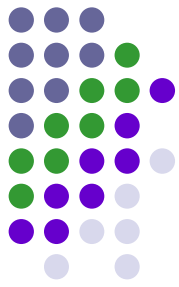
- Began process of developing a web-based data collection tool
- 300 page RFP
- Contract programmer hired

History - 2001



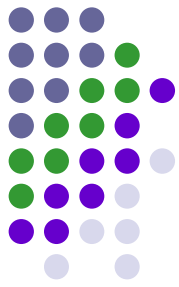
- dataTRAQ is born
- Anywhere in the world
- Service providers entering their own data – no data entry clerks
- Outcomes measurement finally possible

History - 2004



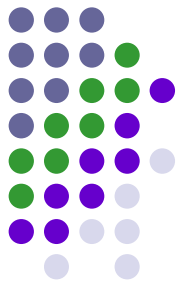
- Crystal Reports introduced into agency culture
- Rolled out to supervisory and management staff
- Bridge between service delivery and accounting system

Where We Are Now: Scope of Agency



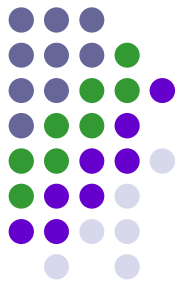
- 85-90 staff
- Provide services in 6 counties
- More than 70 service locations
- More than 50 funding streams
- In FY 07 (July 2006 – June 2007):
 - Served nearly 60,000 clients
 - Conducted nearly 13,000 client surveys
 - Ran reports on more than 300 queries
 - Managed 3 subcontractors
 - Served as fiscal agent for 3 agencies

Where We Are Now: Scope of Services



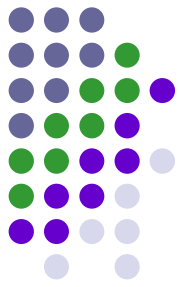
- 9 programs:
 - School-Based Counseling
 - Marriage Education
 - Individual and Family Counseling
 - Parent Resources and Education
 - Family Reintegration
 - Substance Abuse Education and Prevention
 - Case Management for:
 - Families
 - Seniors
 - Persons Living with HIV/AIDS

Where We Are Now: Functional Departments



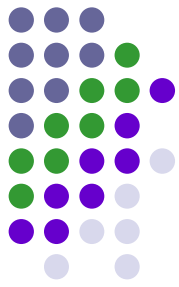
- Fiscal
- Management
- Quality Assurance
- Development / Fundraising
- IT / Operations
- Communications
- Intake

Why Have a Data System?

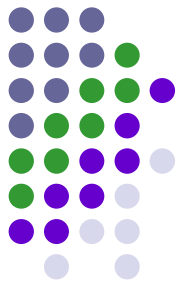


- ***More*** and ***better*** services for individuals, children and families.
 - Better service provision
 - Better management
 - Better supports

How Does Data Collection Empower Better Service Provision?



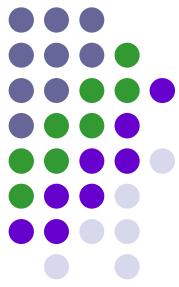
- Contracts require data entry into other systems
- Management needs for information
- More data entry = less time for direct service
- Automated processes free up staff



How Does Data Collection Empower Better Service Provision?

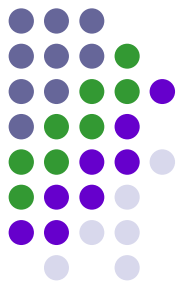
- More direct service
- Real-time information access
- Cross-functional applications
- Compliance with HIPAA and other standards

How Does Data Collection Empower Better Management?



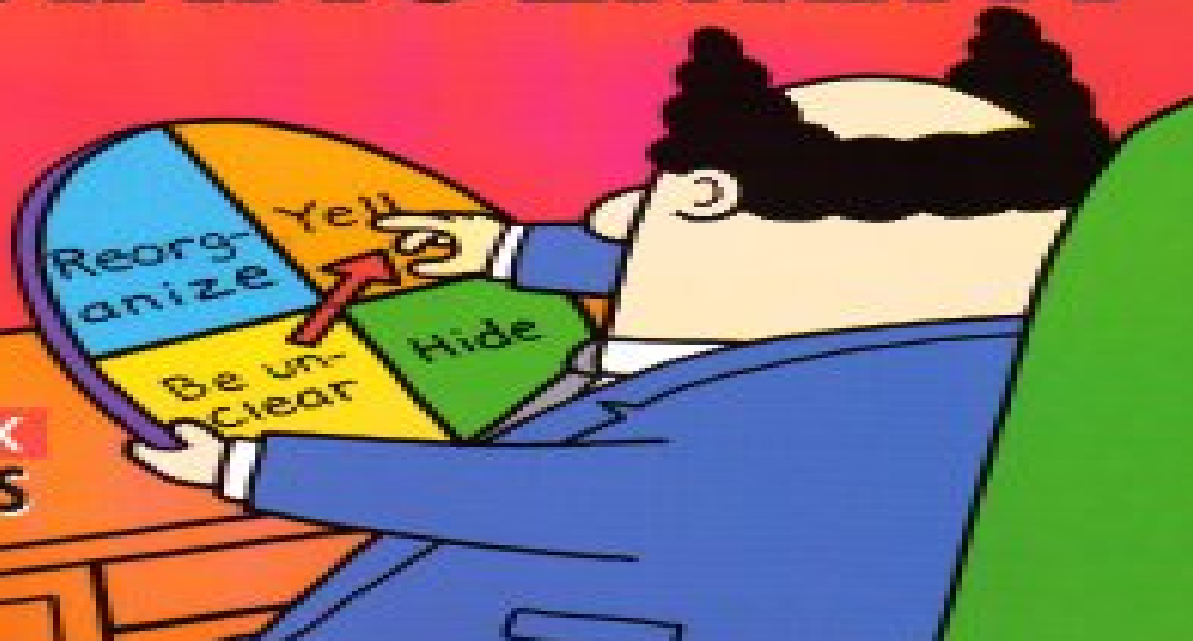
- Staffing patterns
- Productivity standards
- Budgeting
- Trend forecasting
- Real-time adjustments
- Data-driven decisions

Management



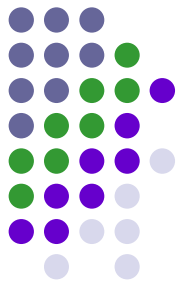
DILBERT

RANDOM ACTS OF MANAGEMENT



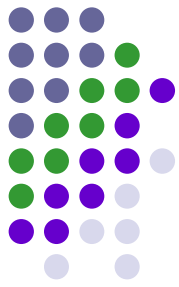
A DILBERT BOOK
BY SCOTT ADAMS

How Does Data Collection Empower Better Quality Assurance?



- Continual feedback and quality assurance
- Reports run on as-needed basis
- Data is examined from a number of perspectives

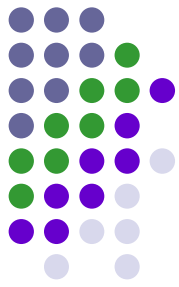
How Has Data Allowed for Agency Growth?



Since 2000:

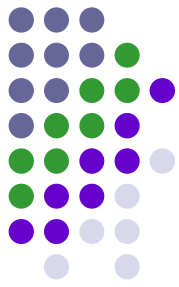
- 34% revenue growth
- Number of agency funders up 48%
- Now manage more than 50 funding streams

The Benefits of Easy Data Access



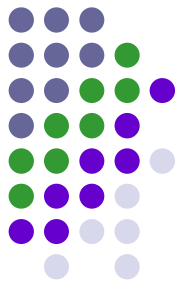
- No data “gatekeeper”
 - Easy access
- Grants
 - Needs
 - Demographics
- Contracts
 - Billing
 - Compliance
- Programs
 - Staff time and productivity
 - Outputs and outcomes

How Has Data Enhanced Grant Development?



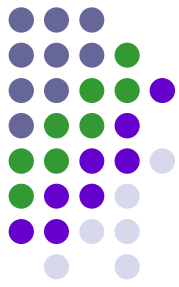
- Focused funding
 - Develop program funding opportunities
 - Express client needs
- Customized proposals
 - Highlight demographics, etc.
 - Target funders' interests

How Has Data Enhanced Grant Development?



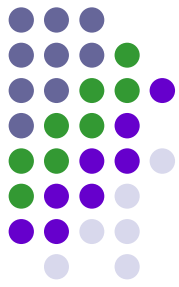
- Determine grant feasibility
- 75% grant writing success rate in 2006
- Identify changing client needs

How Has Data Enhanced Contract Management?



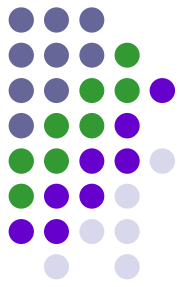
- Data up-to-date
- Reports run at any time
 - Evaluate progress
 - Guarantee contract terms being fulfilled
 - Ensure gathering necessary data
 - Track time spent
- Audit time significantly lower

How Has Data Enhanced Report Development?

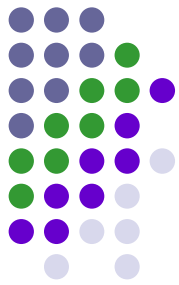


- Old Method
 - Pull each client file
 - Dedicated data entry staff
- New Method
 - Staff input own client data
 - Real-time data always available

How Has Data Enhanced Report Development?



- Easy report generation
 - Reports in 1-3 minutes
 - More time for analysis
- Mid-term reports
 - Keep in touch with funders
- Self-administered surveys



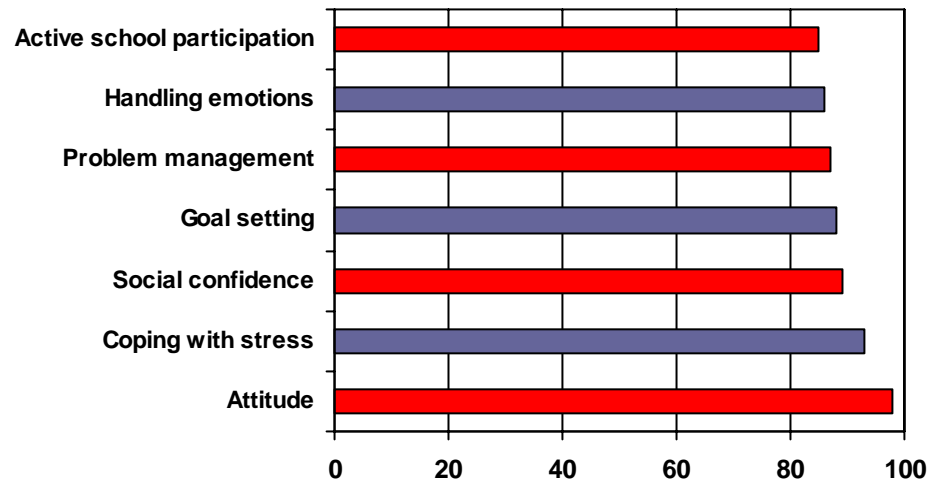
School-Based Counseling Services Performance Report and Evaluation 9/1/2006 – 6/30/2007

Outputs

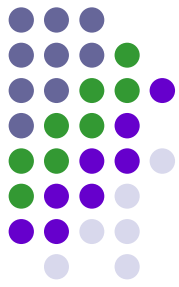
- **3,496** individuals received services
- **3,213** individual, family and group counseling sessions conducted
- **473** students participated in **1,073** group sessions
- **644** consultations on behalf of students and families
- **267** crisis interventions conducted
- **58** Katrina survivor students counseled

Outcomes

Students reported improvement in the following areas:

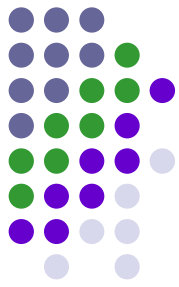


How Has Data Enhanced Communications?



- Communicate agency's value
 - Public relations
 - Newsletters
 - Annual reports
 - Collaborative meetings
 - Emergency funding requests

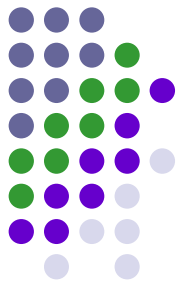
Creating a Data System and Culture: Standard Process



5 Steps:

- Initial Assessment
- Decision Process
- Plan
- Execution
- Evaluation

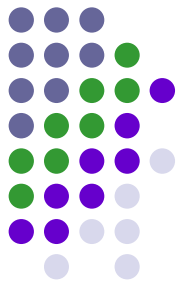
Creating a Data System and Culture



Initial assessment

- How do staff currently input and use data?
- What are reporting needs for funders?
- Will services stay the same or evolve?
- Incremental approach or all-at-once?
- Everyone uses vs. selected staff
- How much time/money are you willing to invest? (double it)
- Off-the-shelf vs. homegrown products
- Top-level (CEO) buy-in

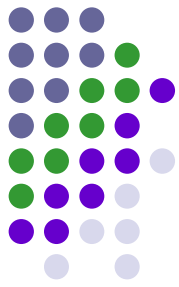
Creating a Data System and Culture



Decision Process

- Input from key staff at all levels
- Is the decision executive or legislative?
- Is the decision time-sensitive?
- Make the decision
- Share the decision clearly

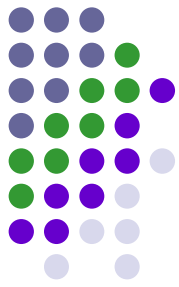
Creating a Data System and Culture



Plan

- Identify an expert
- Create timeline
- Select / create product
- Ramp up IT infrastructure
- Get stakeholder input
- Cultivate / revise plan

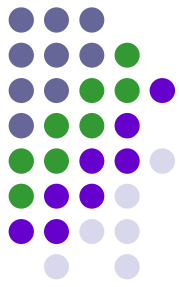
Creating a Data System and Culture



Execution

- Training
- Staff buy-in
- Re-education
- Management

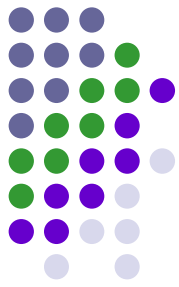
Creating a Data System and Culture



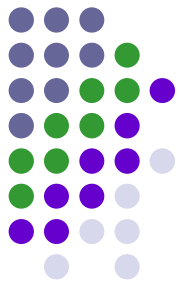
Evaluation

- Utilize sound methodology
- Continually evaluate
- Constant revision
- An ever-evolving product

Design Considerations

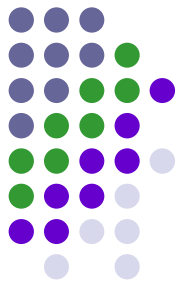


- What does a data system need to be?
 - Flexible and dynamic
 - User-friendly
 - Robust in terms of reporting
 - Cost-effective and time-effective
 - Integrated with daily staff activities
 - Web-based / internet-accessible
 - Multi-functional



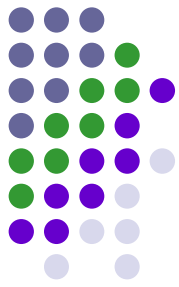
What Does the Future Hold?

- Wi-Fi
- Mobile devices: Tablet PCs, PDAs, etc.
- Real-time data entry and client assistance
- Seamless integration with other systems
- More self-monitoring by direct service staff



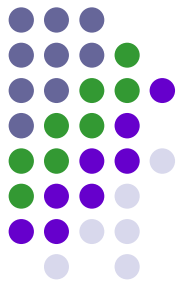
Open Forum

How much difficulty does your agency have moving data from one system to another?



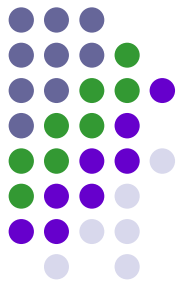
- Our experience:
 - Moving information between systems is as much about relationships and communication as it is about compatible data structures
- Ex: HIV System
 - County system for collecting data for clients infected or affected by HIV/AIDS
 - Keith sat on steering committee
 - We served as the Alpha and Beta test site
 - Still register clients through their interface
 - Batch all service delivery and outcomes measures

Does your agency struggle with outputs and outcomes reporting?



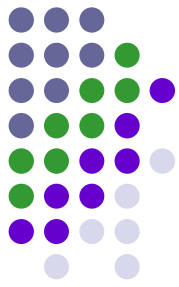
- Outputs:
 - Number of clients served
 - Type of service
 - Brief
 - Intensive
 - Trained vs. Professional / Licensed
 - Key features / demographics of clients
 - General: gender, ethnicity, income
 - Program-specific:
 - Is client a single mother?
 - Is client in a transitional living environment?
 - Is client hearing / vision impaired?

Does your agency struggle with outputs and outcomes reporting?



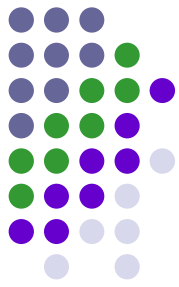
- Outcomes:
 - Result of services
 - The “why” of services
 - Examples
 - Were clients’ needs met?
 - Did clients improve during provision of service?
 - How much improvement is attributable to service?
 - Were results temporary or sustained?
 - Who else was impacted (family, environment, etc.)?
 - Measured in a number of different ways
 - Pre-Post Instruments
 - Satisfaction Surveys: client, family system, environment
 - Staff- vs. self-administered
 - Short- vs. long-term impact

Does your agency struggle with outputs and outcomes reporting?



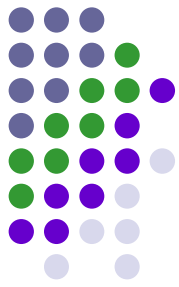
- Outcomes should be used for more than just reporting
 - Management tool to increase efficiency and productivity
 - Continually improvement
- Quality Control
 - Collaborative monthly meetings: supervisors and other key staff
 - Data derived by automated QI reports
 - Review outputs, outcomes, revenues, etc.
 - Is each program on track? If not, why? How to get the program back on track?
 - QIP workgroups
 - Different levels of intervention: staff education vs. new business rules
 - Program / staff development

How well can your agency account for how your staff's time is being spent?

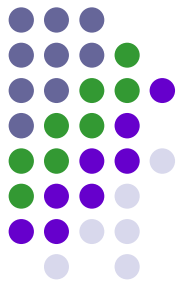


- Generate contract billing reports
 - Hours spent, not hours projected
 - Allocate costs
 - Staff time allocations by program and funding stream

How disruptive is an audit to your agency's everyday workflow?



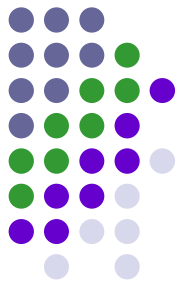
- Less preparation time
- Limited involvement by service staff
- Faster access to records
- All auditing is done through dataTRAQ
- Joint Commission survey completed using only online system
- Audit tracing done within the system



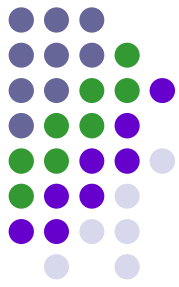
What portion of your agency's clinical documentation is managed electronically?

- Online clinical documentation
- Contract assessment and review dates tracked internally by the system
- 15% reduction in staff time purging medical records

How open would your agency's staff be to using a new system?



- Agency culture prior to implementation
- Paradigm shift
- Gradual approach
- Ingrained in new employees
- Continual evolution



Questions and Discussion