Setting the Stage for a Data-Centered Organization

February 14, 2018: 2 PM ET
The Promise of Community Action

Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community and we are dedicated to helping people help themselves and each other.
Agenda
February 14, 2018

• Learning Community Information
• Introductions
• Setting the Stage for a Data-Centered Organization
• Question & Answer Session
  – type your questions in the chat box at anytime throughout the webinar!
• Meeting Schedule & Wrap Up
Purpose: The purpose of the LCRC is to analyze Community Action outcomes and identify effective, promising, and innovative practice models that alleviate the causes and conditions of poverty.

BUILD CAA CAPACITY TO FIGHT POVERTY!
“Learning communities provide a space and a structure for people to align around a shared goal. Effective communities are both aspirational and practical. They connect people, organizations, and systems that are eager to learn and work across boundaries, all the while holding members accountable to a common agenda, metrics, and outcomes. These communities enable participants to share results and learn from each other, thereby improving their ability to achieve rapid yet significant progress.”

- Harvard Center on the Developing Child
The National Community Action Network Theory of Change

**Community Action Goals**

**Goal 1:** Individuals and families with low incomes are stable and achieve economic security.

**Goal 2:** Communities where people with low incomes live are healthy and offer economic opportunity.

**Goal 3:** People with low incomes are engaged and active in building opportunities in communities.

**Services and Strategies**

- Employment
- Education & Cognitive Development
- Income, Infrastructure & Asset Building
- Housing
- Health/Social Behavioral Development
- Civic Engagement & Community Involvement

**Core Principles**

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

**Performance Management**

How well does the network operate?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

What difference does the network make?

- Individual and Family National Performance Indicators
- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

This publication was created by NASCSP in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Grant Number 90ET0451.
Subject Matter Expert

Dr. Barbara Mooney
Setting the Stage for a Data-Centered Organization

Cultivating Data-Centered Organizations
Objectives

1. Explore three elements of a data-centered organization
   – Data Management Processes, Data-based Decision Making, Communications Related to Data
2. Recognize the role of organizational culture in a move to being more data-centric
   – Acknowledge the role of leadership in fostering this new culture.
3. Understand your own current data processes
   – Why is data collected in your agency? How? By whom?
   – Identify elements of data throughout the agency
What is data?

- Facts and statistics collected together for reference or analysis.
- Figures, details, particulars, characters, symbols
- Things known or assumed as facts, making the basis of reasoning or calculation.
- Set of values of qualitative or quantitative variables.
- Any sequence of one or more symbols given meaning by specific act of interpretation.
  - Data requires interpretation to become information. To translate data to information, there must be several known factors considered.
Data Quality Includes:

- Complete
- Accurate
- Timely
- Reliable
Elements of a Data-centered Organization

Definitions and Discussion
Core Values that Characterize the Data-centric Organization

• The data-centric approach values decisions that are supported by verifiable data.
• The success of this approach is based on data that is accurate, reliable, timely and complete.
• This requires a management system that monitors data entry and provides follow up.
• It is imperative that the agency also has a system (or process) to store, retrieve and aggregate the data so it can be analyzed.
Core Values that Characterize the Data-centric Organization - continued

• In addition to assuring the quality of data collection and storage, the data centric approach relies on effectiveness of analysis and interpretation of the data.

• None of the previous values will make a difference if the information gained from the analysis is not put to use to improve agency actions and produce results for families and communities.
There are many ways to look at the concept of “Data Centered” organizations.

We will focus on three core functions:

• Management of data collection, analysis and follow up:
  – Management based on data means not just making decisions but doing follow up and further analysis to create meaning
  – Having established policies and procedures related to data

• Decision Making based on data:
  – Can be called Data –Driven or Fact-Driven; Information-Based or Information-Informed; Evidence-Based or Evidence-Informed

• Data based Communications
• All of these are reflected in what is known as the “organizational culture”

• A key element of data-centric organizations is the fostering and maintaining of a culture that embraces data and the various functions we just identified.
Explicit procedures are the foundation of a data centric organization

DATA MANAGEMENT
“The sheer quantity of information that is descending upon our organizations means that we can't just 'wing it' when it comes to managing information. The strategic imperative to manage information effectively is now irreversible—with devastating consequences for those who assume it is otherwise.”

~ Robert Hillard
Data Isn’t Information

- Not all data at your disposal will lead you to improvements
- Too much data can hamper your understanding
- You have to be careful you don’t find yourself being led in a direction you don’t want to go by data you don’t need.
- Data is only as valuable as the insights you can draw from it
Creating a Way to Manage Data

• Data management It is based on written policies and procedures that include clearly defined actions for each staff position and the purpose for each

• Such a system requires a designated leader (manager, coordinator, etc.) who is responsible for maintaining the system and monitoring it
  – Assuring staff doing data entry is doing it correctly
  – Assuring data is being aggregated and shared to the appropriate staff at identified time frames (monthly? Quarterly?)
  – Participating in analysis of the data
  – Identifying missing data and suggesting ways to secure it
Data Systems

• Must be agency-wide (systemic).
• All stakeholders, including leadership, take a collective responsibility for implementing the system
• The system includes feedback to the people entering the data from the people who are monitoring the data
  – explicit, non-threatening and frequent
• The data entry staff knows what the data elements mean in relationship with the projected outcome
Do You Have A Strategy?

- Do you know what can data do for you?
- Look at your mission and your needs assessment. Do the data you collect provide information that matters to these two documents?
- Do you have questions you want your data to answer?
- Instead of starting with what data you could or should access, start by working out what you want to know.
The System is Based on the Right Questions

Determine

• What you want to know,
• What data will be needed in order to answer your questions.
• Why that information is important
  • AND
• What you will do once you find out what you wanted to know.
On what are your decisions based?

DATA BASED DECISION MAKING
The idea of using data to inform decision making, management and governance in an organization is not new.

Data-driven decision making led Ford Motor Company to perfect the vehicle assembly line in 1913.
How Is This Different?

• Terms “data,” “fact,” “information,” and “evidence” are all used to signal a specific focus – which may require a change in perspective.

• “Data-driven” means that the agency is compelled by data, rather than by intuition or by personal experience in the selection of outcomes to be achieved and services/strategies to achieve them.
“Without data, all anyone has are opinions. Data elevates the probability that you’ll make the right decision.”

-W. Edwards Deming
Improving Decision Making

From

Problem

To

Problem

Data Analysis

Solution
What is Data-Based Decision Making?

- The data centric agency will focus on the various aspects of data processes: Collecting, Storing, Retrieving and Aggregating, Analyzing, **Making Decisions**, Taking Action
- In the center of the data processes is decision making.
- Specifically, the data centric agency has a commitment to making decisions based on actual facts, not on gut reactions or personal experience.
- Without it all you are basing decisions on hunches, opinions and “what we have always done.”
Why is Data-Based Decision Making Important?

- It is not based on a single incident but rather on understanding of patterns, practices and relationships that can be maintained or improved.
- Helps us see our strengths and our challenges.
- Having the foundation of “facts” that are equally accessible to all staff, creates competence in staff so they will have the knowledge, skills and tools to enhance the performance of their job duties and the results for those they serve.
Getting Ready for Decision Making

- Make sure staff has access to the data
- Offer professional development on data analysis tools
- Build time for data-related tasks into everyone’s schedule
- Structure conversations about data -- develop guiding questions for data discussions to be used by teams
- Be aware of the different types of data available: Input (services and activities), Process, Outcome, Satisfaction (or perception), Performance, Demographic.
- Understand the priorities for decision making (what must be done first?)
Decisions Are Made After:

• The compilation of important and relevant data.
• Displaying data in user-friendly ways.
• Analyzing it from different perspectives and/or combining it with other data.
  – Asking the right questions.
• Discussing the data with others who may have insights.
Being Data Centric is On-going

Types of data
- Input
- Process
- Outcome
- Satisfaction

Information

Actionable knowledge

Types of decisions
- Set and assess progress toward goals
- Address individual or group needs
- Evaluate effectiveness of practices
- Assess whether client needs are being met
- Reallocate resources in reaction to outcomes
- Enhance processes to improve outcomes
How you communicate information and decisions says a lot about your agency

COMMUNICATING
Who Can Access The Data?

• Not so long ago it took someone a strong background in technology to mine data for information because it was necessary for that person to understand how databases and data warehouses worked.

• Today, with almost everyone having a data machine in their hand (a smart phone) and many software products that are easy to use, managers can create dashboards to display the data they want to see and run custom reports for their own use.
Who Gets the Information?

• Once the data is turned into information, who gets to see it?
  – What do program managers see?
  – What does front line staff see?
  – What does the board see?
  – What does the general public see?

• How is it communicated?
Assessing Your Reports

• One form of communication is the reports you generate
• These may be from raw data
  – Monthly reports of service utilization, list of customers served
  – Financial reports of tangible assistance payments
  – Logs of attendance at programs
• Or from data that has been aggregated and analyzed
  – Comparison of this month’s data with last month (year to date)
  – Services grouped by providers
Things to Consider

• **Quality** of the data -- Accuracy, completeness and timeliness of the data included in the report

• **Presentation** of the data in the report – it is easy for the reader to find data that is important to him/her?

• **Usefulness** of the data – is it relevant to the task of managing the program/service? Do I have access to the data when I want/need it?

• **Performance Focus** – includes data on outcomes and performance
Beyond Reports

• What data is included in agency newsletters or brochures?
• On the agency’s web site?

• Is discussion about data a part of staff meetings? Is there opportunity to discuss the meaning of what the data is demonstrating?

• Do staff include data in their informal conversations with each other?

• What is expected of the Board in terms of communications about the data?
The Data-centered Organization

OUTCOMES

- Communication about Data
- Data-based Decision Making
- Data Policies and Practices
Organizational Culture

Changing to become data-centric
Cultural Change Is Fostered Not Mandated

- Organizational culture is founded on its people’s deep-seated beliefs and emotions
- It cannot be changed by a directive to “change their culture.”
- Instead, the leadership of the organization must persuade them that cultural change is necessary, and help them construct and internalize an alternative belief system that produces a new set of behaviors.
“Trying to implement new behaviors and measurements without addressing the underlying culture is counterproductive — it results in even well-intentioned people slipping back into old, undesirable behaviors during times of pressure and uncertainty. As something members of the organization must do collectively, substantive business transformation begins with culture, and culture begins with a shared language for how information is managed and used.”

~ Alan D. Duncan
The Role of Leadership

• A good leader can create a climate that fosters excellence in providing service and producing results
• Insist on and model data use as part of the organizational culture.
• Acknowledge successes.
• Leaders must be, themselves, somewhat “data savvy” so they can appropriately guide discussions and actions.
• Be explicit about how data influences decision making.
• Be clear about who the stakeholders are and how each engages with data.
• Articulate the measurable outcomes that can be found in data and analytics initiatives.
• Communicate how data influences work.
Clear Messages to Staff

• Create a specific position for someone who will coordinate and manage the data policies
  – Assure quality data (accurate, reliable, timely, complete)
  – Assists in the flow of data to analysis points and then to decision makers
• Change all staff job descriptions to include their role in the collection, storage, retrieval, aggregation and analysis of data.
  – Identify specific elements of data for which they are responsible
• Provide recognition of work well done – this will require close supervision and follow up so staff is consistent in their actions.
Foster a Data-Centric Culture

- Leadership influence
  - Identifies and communicates the value of data driven decision making
  - Foster the Culture Change to Data Centric Organization by example
  - Job Duties and Job Descriptions include elements of data collection and analysis
  - Create a position for a data manager or data coordinator
  - Communicates the ethical considerations of data collection and analysis
What **expectations** does your Leadership Team have?

- It is important to establish clear exceptions about the entire data process.
- What **data sources** would you like your Leadership Team to utilize?
- What decisions must be made?
- How do you expect to take action about the decisions?
- How will the Team follow up (to see what happens once the action is taken)?
Challenges for Staff

• Finding time to review data and reflect on what it means
• Understanding the significance of data analysis as a diagnostic tool to make improvements rather than just a report of what was done
• Seeing the big picture rather than simply focus on “their” customers
• Knowing what to do after the analysis --determining what actions to take, how to make changes when needed improvement is identified
• Knowing what data elements to collect and analyze (or why specific elements are “required” to be collected)
• Understanding benchmarks and how they are applied
• Determining if they collected the right data (is it a reliable indicator of performance?)
• Feeling confident in data aggregation and analysis skills (am I asking the right questions?)
Thinking about your agency’s staff:

<table>
<thead>
<tr>
<th>1 – Strongly Agree</th>
<th>2 – Mostly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 – Mostly Disagree</td>
<td>4 – Strongly Disagree</td>
</tr>
</tbody>
</table>

• Staff at all levels of the agency are comfortable collecting data.
• Staff is comfortable talking about data.
• Staff members can manipulate the data about the customers they serve. (such as about others receiving the same service; about the customers receipt of other services, etc.)
• Staff can analyzing the data and compare with benchmarks.
• Staff can set goals/targets based on their data.
• Staff uses data to make decisions. (how often? Every day? At the end of each week?)
• I am satisfied with data-driven decision making at the agency.
What else?

• In addition to fostering a new Mind-set among staff, leadership must provide opportunities for the development of new Skill-sets to support the use of data in the decision-making process
Which area could use new skills?

- Collecting, storing, retrieving Data
- Analyzing Data
- Using Data for Decision Making
- Putting Decisions into Action
- Communicating Data
Your Current Data Processes

Where is the data?  Who collects it?
What happens to it?
Know What Is Happening Now

- What is the importance of data collection in your agency?
- Why is data collected?
- Who does the collection? How is it done?
- Where did the data come from, and is it truly representative?
Data Throughout the Agency

- Receptionist
- Case Manager

...
It is important to consider the difference between output data, process data and outcome data.

- **Output data** – tracks number of people served, number of units of service, attendance, demographics
- **Process data** – tracks who is providing the service, how the service is delivered (in a group, one-on-one, etc.), where the services is delivered (phone, in person in office, home visit, etc.)
- **Outcome data** – tracks progress toward a goal and the achievement of benchmarks
Sample Flow Chart
• Aggregating similar data elements can be a simple function of a report feature.
  – Such an aggregation could tell you how many people of a certain age were served by a specific program.

• Integrating data from different data systems is very rarely simple.
  – It may include different definitions of basic data elements (household or family? For instance) which can cause problems in bringing agency wide data together for analysis.

• Integrating different data elements can also be challenging.
  – How many people who received a certain service also achieved a certain outcome?
  – How many people received multiple services to enable them to achieve a certain outcome?
An Example of a Data Centric Agency

Bayaud Enterprises
https://www.bayaudenterprises.org
What Was the Need?

• Two years ago, Bayaud had about 30 independent data systems in place, either Excel or Access.
• Most staff maintained their own program data. There was no way to run an agency wide report.
• The agency made a commitment to secure an agency-wide data base and software system (eLogic), but this was met with considerable resistance from staff.
• The agency persisted.
• They identified a Data Manager who worked with the software company to develop a series of diagnostic reports that gave agency management some data to consider in trying to understand “what works.”
• At this early stage, the reports showed what data was missing and what was incomplete.
• Some reports showed the relationship between customers who had positive outcomes with the staff who served them, and those staff whose customers had not made progress.
Taking Action

• Agency management began a formal in-house training program and evaluation for staff to make sure they understood and used the agency software system rather than the fragmented systems they had been using.
• The ED attended the training sessions (clearly sending a signal that they were important).
• The agency's job descriptions were changed to include data entry and responsible data management activities using specific tools.
• Training aides were developed to support staff and diagnostic outcome reports are now run on a routine basis.
Taking Action - continued

• New staff hired at this time was oriented as to the importance and value of data.
• While this was going, on Bayaud hired a Marketing and Planning director who supported this new awareness of data and created communication tools to share the agency focus on using data to operate their programs.
What Happened?

• The Data Manager and the Marketing and Planning director developed an agency Theory of Change which they have worked with the staff to adopt.

• Next they are developing a methodology for SROI-Social Return on Investment.

• During 2017, the Data Manager (who had been the focus of much of the other employees’ resistance to the changes) was promoted and was voted by her peers as Employee of the Year and honored at a formal dinner.

• One of the agency programs, the Denver Day Works program, was recently evaluated by University of Colorado. Based on the report, which was clearly data driven, transparent and fully accountable, the agency received two additional years of funding amounting to $800,000 as well as huge goodwill and positive publicity in the Denver metro area.
More examples from data centered organizations
  – Including examples from LC members

Continued exploration of your own agency processes
  – So you can compare your processes with those of agencies who have begun to establish a data-centered approach to their organization’s structure, activities and results.
For More Information

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Open Chat and Questions
Follow the Learning Community Blog
Visit:  www.lcrcweb.com
and Subscribe!
CSBG TTA Resource Center

T/TA Submission
Submit a request for training or technical assistance. We will confidentially help you identify issues or areas of improvement, point to resources, and connect you with those that can help.

Consultant Bank
Search through a screened list of consultants who offer T/TA in the CSBG Network.

Discussion Forum
Connect with your peers to ask questions, share experiences, and get announcements.

Resource Bank
Search for resources such as evidence based or informed programs and practices, toolkits and guidebooks, webinar recordings, and more.

Shared Calendar
View a calendar of events in the CSBG Network.

www.csbgtta.org
Webinar Wednesdays!


https://www.communityactionpartnership.com/menus/webinars.html
Stay Connected
Continue Learning

Join the online Community Action Academy!

Results at the Community Level
Free, online learning hub for the Community Action Network

2. Once the account confirmation is complete (via email), login.
3. In the Course Categories box to the right of the screen, click Learning Communities.
4. Choose Open Learning Community Groups, then Results at the Community Level.

Engage through online discussion, accessing resources, and agency resource sharing!
Meeting Schedule

- February 14, 2018 at 2 pm ET
- February 28, 2018 at 2 pm ET
- March 28, 2018 at 2pm ET
- May 2, 2018 at 2pm ET
- June 13, 2018 at 2pm ET
Baseline Survey

Please take the baseline survey so we can gauge learning and make improvements!

https://www.surveymonkey.com/r/OpenLCG2018

Only 6 short questions!
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This presentation was created by the National Association of Community Action Agencies – Community Action Partnership, in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services Grant Number, 90ET0452. Any opinion, findings, and conclusions, or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families.