FOSTERING A CULTURE OF DATA: USING IMPLEMENTATION SCIENCE TO SUPPORT ORGANIZATION-WIDE EFFORTS IN THE UTILIZATION AND UNDERSTANDING OF REPORT DATA

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Agenda

• Introduction & Background
  • Learning Objectives
  • Agency Background
  • Who we are & Who’s in the room?

• Fostering a Data of Culture
  • Explore: Framework and Resources
  • Engage: Vignettes 1 and 2

• Small Group Work

• Questions
Learning Objectives

As a result of attending this session, participants will be able to:

1. **Identify** and describe three foundational processes in data culture implementation.
2. **Evaluate** organization’s current culture of data for strengths, weaknesses, opportunities, and threats.
3. **Assess** a current report or data workflow for an area to incorporate at least one foundational process.
Hathaway-Sycamores
Community-based mental health & child welfare organization serving roughly 6,858 youth & families/year in Los Angeles County, CA,

Wide Array of Mental Health Services:
- Outpatient
- Community-Based
- School-Based
- Residential (STRTP)
- Wraparound
- Prevention and Early Intervention (PEI)
- Full Service Partnership (FSP)
- Therapeutic Behavioral Services (TBS)
Hathaway-Sycamores

2017-18 OUTCOME MEASURE REPORT: HIGHLAND PARK

Where We Serve

Who We Impact

Ethnicity

Gender

Clinical Areas Treated

Who We Are

680 Dedicated staff
399 Helpful volunteers

Community members involved in mental health and substance use treatment

908 Professionals trained in Clinical and Evidence-Based Practices Training

100% 87% 83% 78% 74% 70% 66% 62% 58% 54% 50% 46% 42% 38% 34% 30% 26% 22% 18% 14% 10% 6% 2% 0%

Hopefulness

92% 88% 86% 84% 82% 80% 78% 76% 74% 72% 70% 68% 66% 64% 62% 60% 58% 56% 54% 52% 50% 48% 46% 44% 42% 40% 38% 36% 34% 32% 30% 28% 26% 24% 22% 20% 18% 16% 14% 12% 10% 8% 6% 4% 2% 0%

100% 90% 80% 70% 60% 50% 40% 30% 20% 10% 0%

Hathaway-Sycamores Offices

Hathaway-Sycamores Headquarters

5
Introductions
• Phases aligned with Implementation Process
• Considers internal and external contexts
We asked:
What barriers to utilizing data do you experience?
The Collaboration, Monitoring, and Internal Compliance Report Cycle

References for each step in the cycle can be found on slide 38.
The Cycle: Repeat, Reuse, Recycle!

**Recursive**
Any stage of the process can be revisited at any time for changes and improvement

**Dynamic**
Each stage of the process is interactive and subject to change over time

**Responsive**
Each stage of the process helps us prepare for future changes

**Inclusive**
The process looks for the input of different perspectives in the organizational structure
Accompanying Checklist

• Collaboration
  • Meet with and gather information from as many individuals as practical

• Monitoring
  • Assess logistics of distribution
  • Continue open feedback cycle

• Internal Compliance
  • Identify items for follow-up
  • Initiate process improvement plans
  • Reevaluate report’s ability to meet current needs
Example 1

PEI Practice Council Reports
PEI Reports: **Consult Data Experts**

- Met with Finance and Quality Management
- Determined what was already incorporated what new data was needed

**Successes:**
- Able to ensure consistency in how finance metrics were reported across departments
- Review what was already being done

**Room for Improvements:**
- Gather stakeholders and data experts at the same time
- Be more specific when sharing data
- Ensure understanding of data from other parties including how metrics are defined and calculated
PEI Reports: Meet with Stakeholders

- Met with each practice council lead
  - As collective group
  - Followed up as needed individually
- Used a worksheet to record metric possibilities

Successes:
- Targeted and actionable ideas on specific metrics
- Deadlines allowed for progress to be made on report creation

Room for Improvements:
- Encourage even more conversation and collaboration
- Ensure understanding around the utilization of data
PEI Reports: **Create a Prototype**

- Piloted a universal template
- Individualized template for each practice council

**Successes:**
- Individual reports allowed for more targeted feedback
- Able to solve issues of joining multiple data sources before scaling

**Room for Improvements:**
- Reflect time and resource intensive prototype process for each practice council in timeline
- Involve data experts more
PEI Reports: **Pilot Prototype**

- Shared pilot with goal of receiving feedback
- Discuss completeness of pilot and needed enhancements

**Successes:**
- Revised vague metric titles and confusing graphics
- Solidified the report design
- Cleared up any discrepancies or confusion with the data

**Room for Improvements:**
- Include data experts more
PEI Reports: Monitor Distribution

- Solidify details around report distributed workflow
  - Frequency
  - Recipients
  - Method

Successes:
- Uniform distribution allows for more transparency and consistency in communication
  - Email distribution is timely and resource efficient

Room for Improvements:
- Consider balance between uniform distribution and timeliness as it applies to utilization of data earlier in cycle
- Increase opportunities and methods for communication and feedback
PEI Reports: **Follow up with Stakeholders**

- Leveraged an existing quarterly meeting time
- Create standing meeting items around feedback and needs/current priorities

**Successes:**

- Encouraging feedback helps to assure the report’s usefulness
- Following up on the data facilitates open discussion on key findings

**Room for Improvements:**

- Limit introducing/altering metrics if trend data is important
- Increase support around initial communications
PEI Reports: **Continually Monitor Data**

- Routine review of workflow and data points
- Early identification of potential threats to data integrity

**Successes:**
- Targets potential flaws in the data collection process
- Ensures completeness, accuracy, and consistency of data

**Room for Improvements:**
- Early identification of a data expert for “red flag” identification
- Training of report analysts on data trends
PEI Reports: **Implement Process Improvement**

- Guided discussion based on data points
- Work with stakeholders to identify areas to improve the programs/services

**Successes:**
- Increased credibility for suggestions on improving the impact of funding utilization
- Allowed for more targeted increase of PEI utilization

**Room for Improvements:**
- Increase follow-up connections between the various departments to close loop
PEI Reports: **Reevaluate Report**

- Reevaluated the data collection, analyzing, and reporting process
- Make continuous improvements in efficiency and accuracy of data

**Successes:**
- Discovered ways to make the data more approachable
- Joined different departments that work with same data but in different ways
- Solidified a common language around metrics and data to ensure data integrity

**Room for Improvements:**
- Increase opportunities for face-to-face communication to limit feedback and understanding delays in the processes
PEI Reports:
Repeat, Reuse, and Recycle
Example 2

Personal Rights Check-in Tool and Report
Personal Rights Check-in: Consult Data Experts

- Met with Residential Program leadership and staff
- Identified metrics, questions, and items of interest for the survey

Successes:
- Flexibility to create survey items and accessible for staff

Room for Improvements:
- Include more program staff voice in survey development and revisions
- Ensure that all program staff understand data utilization goal
Personal Rights Check-in: **Meet with Stakeholders**

- Met with program leadership and staff
- Discussed the survey data and value of the items
- Adjusted survey items based on feedback

**Successes:**
- Collaborated with all program voices
- Able to address any concerns regarding survey questions

**Room for Improvements:**
- Ensure that all program staff have appropriate training for survey administration
- Identify incentives for survey completion by youth
Personal Rights Check-in: **Create a Prototype**

- Collaboration with stakeholders
- Identified best way to visually present the data create a visual report.

**Successes:**

- Data easy to monitor and analyze on online platform
- Leveraged the resources and skills (i.e., data viz techniques) to develop visuals
- Multiple data experts were able to collaborate

**Room for Improvements:**

- Identify methods to best automate visual report with current workflow
- Create instructions on why and how to best analyze the data to ease transition
Personal Rights Check-in: **Pilot Prototype**

- Test accessibility of survey in residential setting
- Test format of report to relevant program stakeholders

**Successes:**
- Leverage existing technology resources
- Clear data metrics
  - Gained program leadership buy-in

**Room for Improvements:**
- Develop formal guidelines for reasoning behind items
- Identify alternatives to online survey format if needed
Personal Rights Check-in: Monitor Distribution

• Solidify details around report distributed workflow
  • Frequency
  • Recipients
  • Method

Successes:
• Able to disseminate report to relevant program stakeholders via email
• Determined frequency of reporting distribution as monthly and quarterly

Room for Improvements:
• Create checklist to ensure all relevant stakeholders are included in report distribution
• Create venue for research team and program staff to communicate about irregularities in the data in a timely manner
Personal Rights Check-in: **Follow up with Stakeholders**

- Established recurring “roundtable” meetings with program leadership and staff
- Dedicate time to review and revise report

**Successes:**
- Able to meet in person with all relevant program stakeholders
- Strong feedback created opportunities for meaningful revisions and future action steps

**Room for Improvements:**
- Identify essential stakeholders that must be present to account for scheduling difficulties
- Check for understanding among collaborators on how metrics are defined and calculated
Personal Rights Check-in: **Continually Monitor Data**

- Research team frequently monitors the data to ensure completion and identifies inconsistencies.

**Successes:**

- Able to track all data and related information
- House all data in one platform (i.e., Survey Monkey)

**Room for Improvements:**

- Automate data analysis and provide guidelines on how to best analyze data
- Improve timeliness of communication with program staff when irregularities arise
Personal Rights Check-in: **Implement**

**Process Improvement**

- Follow program leadership and staff suggestions for action items
- Track progress of change items

**Successes:**

- Able to identify baselines for specific items
- Able to track changes over time on the items

**Room for Improvements:**

- Create meetings with program leadership and staff to determine targets and goals
- Align with other departments to ensure reporting consistency and presentation
Personal Rights Check-in: **Revaluate** Report

- Schedule “roundtable” debriefs within the research team

**Successes:**
- Revisions made to items to minimize redundancy and maximize clarity
- Review items that were already implemented

**Room for Improvements:**
- Communicate reasons behind any survey change
- Train staff on workflow changes
Personal Rights Check-in: Repeat, Reuse, and Recycle
Small Group Discussion

What can you bring back to your organization?
Large Group Discussion
Take Home/Summary

• Foundational processes in data culture implementation
  • **Collaboration**
    • Consult Data Experts
    • Meet with Stakeholders
    • Create a Prototype
    • Pilot Prototype
  • **Monitoring**
    • Monitor Distribution
    • Follow Up with Stakeholders
  • **Internal Compliance**
    • Continually Monitor Data
    • Implement Process Development
    • Reevaluate Report
  • **Repeat, Reuse, Recycle!**
References


Thank you!

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