Child Welfare IT Managers' Webinar Series: Child Welfare Information Technology Systems Managers and Staff

Creating Business Intelligence for West Virginia's Bureau for Children and Families

June 30, 2015

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Coordinator: Welcome and thank you for standing by. At this time, all participants are in a listen-only mode. During the Q&A session, if you would like to ask a question, you may press Star 1 on your phone. Today's conference is being recorded. If you have any objections, please disconnect at this time.

Now, I would like to turn the meeting over to Ms. Joyce Rose. Ma'am, you may begin.

Joyce Rose: Thank you. Welcome to the Child Welfare Information Technology Systems Managers and Staff Webinar series brought to you on behalf of the Health and Human Services Administration of Children and Families Children's Bureau and presented by ICF International. Today's webinar is entitled "FACTS-RAILS: Creating Business Intelligence for West Virginia's Bureau for Children and Family." I am Joyce Rose, your host and moderator for today's webinar.

For new attendees and for those who may have missed previous webinars, here is the list of the previously recorded webinars, which are posted to the link identified on the slide.

Please note that in June we are pleased to present – oops! that's not correct -- in July, we are pleased to present the New Jersey Managed-by-Data program focusing upon changing culture and enhancing the capacity to improve outcomes. And we are currently working on identifying future webinar topics.

Attendees are encouraged to participate in our webinar with questions and comments. All of the participant lines are muted now, but we will open them for the Q&A session at the end of the presentation. However, please be aware that you can submit questions at anytime using the Go-to-Webinar chat feature and those will also be addressed during the Q&A session.

Now, should we run out of time, we will respond to your questions via email and/or, should you have any additional questions, you may submit those to me at the email listed on the slide -- Joyce@kassets.com. Also, if you have any topics that you would like to recommend as potential webinars, please do not hesitate to contact me.

The Division of State Systems within the Children's Bureau continues to provide a series of monthly webinars supporting information sharing and discussion. Actually understanding who is attending the webinars really helps to identify concepts that would be applicable for everyone participating in an agency's child welfare information system effort. Please self-select one of the five categories listed. My colleague, Elizabeth Mertinko, will conduct the poll. Elizabeth?

Elizabeth Mertinko: Yes, Joyce, I don't know if you remember, but from your last webinar -- let's see if we can the software -- I was about to say the software had clunked on me again but it looks like it is going to work for us today. Hurray!

If you can go ahead and click on the correct category and let us know who is there and participating. If you are participating in a room with a group of people, just choose the category that best represents most of the people in the room. We'll just give you another couple seconds to do that. We've got about half of you.

If we can just ask that last couple of you who haven't yet self-identified to please go ahead and do so. Okay. We will go ahead and close it up.

Today, it looks like we have 20% state child welfare information system project managers, 45% -- the single largest group -- is state child welfare information system program, policy or technical staff, 5% of our audience today is tribal child welfare information system program, policy or technical staff, and 30% is ACF Children's Bureau or ACF contractors.

Joyce Rose: I am really pleased to see the large percent of program, policy and technical staff including our tribal partners as I really do believe that this topic focuses squarely on your activities. I want to really thank the West Virginia team for being very diligent and pulling this webinar together (Dog Barking) and you will have to excuse -- that is my dog barking.

Elizabeth Mertinko: Is that your co-presenter, Joyce?

Joyce Rose: Umm – ok – so – umm – Let's go ahead and meet today presenter. Traci Dean is the FACTS IT Program Manager and Administers... Elizabeth?

Elizabeth Mertinko: I'd be happy to take over.

Joyce Rose: Thank you.

Elizabeth Mertinko: Sure. It sounds like Joyce's co-presenter has quite a lot to say about West Virginia’s Team. He is very excited for today's webinar.

Traci Dean is the FACTS IT Program Manager and, as such, she administers a portfolio of operations in IT development projects supporting caseload automation and daily needs of the social service programs run by the Bureau for Children and Families. Traci holds a Master's of Social Work along with a BA in Criminal Justice and has presented at several APHSA ISM conferences.

Shannon Richards is the Functional Manager for the Childcare Development Program and was the functional manager for the National Youth and Transition Database Project. She, too, has a degree in criminal justice.

Stephanie Lindsay – Lindley, excuse me – is responsible for administering the federal reporting for the Bureau of Children and Families including AFCARS

IV-E Quality – Quarterly Claiming – and NCANDS. Her qualifications include a BA in accounting and a minor in economics.

Patty Vincent is responsible for oversight of compliance and mandated Federal and state requirements, implementation and monitoring of statewide social service programs, initiatives, service delivery, offices, policies, and system procedures.

So, with that, I would like to go ahead and turn it over to is it Traci that is going to start us off?

Traci Dean: Yes, I'll be starting us off.

Elizabeth Mertinko: Okay. Thanks.

Traci Dean: Thank you, Elizabeth. We want to express our appreciation for the opportunity to showcase one of our important initiatives that we've been working on here in West Virginia; one that we believe to have a tremendous impact on policy and practice. Today, our webinar objective, we're going to share our evolution in using data in terms of when it comes to Children and Families. We're going to share with you our FACTS/RAILS reporting system, our utilization of successes and challenges, and lessons learned.

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As for the agenda for today, I am going to be talking about the case for creating business intelligence. I will talk about the creation of FACTS/ RAILS. Shannon and Stephanie are going to give you some reporting examples from FACTS/RAILS and Patty is going to be talking with you about how the field utilizes the reports in their day-to-day management of their programs. We'll talk about lessons learned and our next steps with FACTS/RAILS.

Next Slide.

FACTS/RAILS stands for Reporting Analysis Integrated Lookup System -- that's the acronym – and it's our journey through mountains of data. A little bit about ourselves. FACTS –

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FACTS is the West Virginia Statewide Automated Child Welfare Information System. It is the case management system of record for most social service programs administered by the West Virginia Department of Health and Human Resources Bureau for Children and Families. And, we have implemented operational since October 1997.

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So, what is Business Intelligence? Before we get started and going down that track, Business Intelligence refers to applications and technologies used to gather, report, present, and analyze data and information about an organization's operations. BI applications typically read data, store it in a data mart or data warehouse that is a repository gathered from an operational data system such as FACTS; however, the BI applications also can read data on your transactional database depending on the needs of your reporting.

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So, why the need for BI, for Business Intelligence? If you think about it, FACTS holds mountains of child welfare, adult service, and childcare data, base development 18 years' worth of data. We have 2.3 million clients, so it's probably small according to some big states, but big for us – a lot of data tables through that.

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BCF needed a methodology for transforming all of that data into useful information that could be leveraged and to shift focus from compliance management to outcome management and it's really difficult.

If you think about all those spreadsheets with all those datas and being able to try to view that information with that limited reporting. They wanted a methodology that would be able to give them the capability of being able to analyze where they've been and understand what their present performance is right now and to be able to project future trends and order to maximize resource allocation and meet outcomes to better serve the children and families of West Virginia. That’s especially important in these economic times we are in where we're trying to do more with less.

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So, what is FACTS/RAILS? FACTS/RAILS is the BI reporting system for West Virginia. It was created to assist BCF and strategically using performance data to improve outcomes, improve service quality, and practice.

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The BI tool selected for West Virginia is Cognos. Cognos is recognized for its long-term stability and it satisfied all of the BI key performance indicators that we had established. And, for those, that’s, basically, it needed to have analytical capability that provided user interactive data and office capabilities meaning they could be able to take the data, drill through it, drill-down, compare it. We wanted to have a tool that was able to take all of this data that we have in the system and aggregate it into views that would, at a glance, help management know the state of their organization.

In addition, we needed a tool that would create intelligence dashboards at an enterprise level, at an executive dashboard level, at a supervisor and worker level to reduce some of the paper that we were generating, like, the paper reports. The other thing that's pretty critical is we wanted to be able to have visually based summaries of organization -- a picture is worth a thousand words. We needed to have that data visualization capability.

In addition, we wanted a tool that offered quick, simple ad hoc clearing capability. And then, also, to be able to be customized so that the end user could filter it down to my region, my county, my unit level. And then, basically, in order to empower the leadership team and the management to be able to have the right information to run their programs at the right time so there wasn't a delay in getting that information to them.

The other factor in the selection of Cognos -- probably one of the biggest -- is Cognos was already being used by West Virginia's IV-A system. So it had been already established as the department standard. And, to make it more cost efficient, a combined license was purchased to expand the product to IV-E FACTS system and our IV-D childcare system.

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So, what were some of the implementation challenges that we faced? Executive business sponsorships. Anytime you're trying to do an endeavor on this scale, you need executive sponsorship. And, we were fortunate at the time that our former Commissioner, Jason Najmulski, was very interested in using data to improve outcomes. He wanted to move from a compliance management to performance management and he actually went to a couple of states to see what they had been doing, getting some ideas, and was key in getting BI set up for BCF social service programs.

He, basically, laid the groundwork and built the capacity within his leadership team of understanding how to use this data in a different way. Not just counting the number of referrals that came in or the number of contacts that were made but really looking at the data and seeing what they could hypothesize from it. How – you know –why is this county performing better than this county? What can we do to leverage what they're doing here in other counties? And, they really looked at how to do that. He had to build that capacity within his team.

It also requires a commitment to adjust the business process. So, once you have that data, once you're reporting on that data, you need to commit to make the changes you need to see an improvement in your outcomes. He was very committed to that and his leadership team was really committed to that.

The other important thing is commitment to data validation; making sure that there was accurate and up-to-date information in the system; that there really wasn't a lag in-between the times that contact occurred and the time that it was entered in the system. And, importantly, it requires the organization to speak one truth.

There were pockets of folks who still really held onto their hand-counted reports even though what was reported to the Feds was the information in the system, they really still held onto that. It was comforting to hold onto their hand-counted reports. They'd put them in their pocket and carry them around. Jason really worked with them to help them understand about – you know – we need, as an organization, to see what the data is and to work with the data as we're seeing it. That was a pretty big step.

And, of course, he worked with his team to establish the performance goals and measures that we'd be reporting on. And, importantly, it requires commitment to provide necessary resources and that's not just the resources to purchase the product and the analysts to build it; it's actually the resource commitments on the state side of looking at the reports, analyzing the reports, and then making those changes.

And, of course, the big part of that is recognizing and prioritizing the importance of creating staff buy-in. That was one of the things that he did with his team that he did really well. He went out and talked to folks. They did regional meetings – you know – incorporated it into his management calls, and did very good with getting buy-in from the leadership.

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The implementation strategy that we used to implement? We employed a top-down approach for measuring outcomes and monitoring performances. It was targeted mainly towards the BCF leadership team down through the regional director, the regional program managers, and county CSMs. Those were the targets of the reports.

And, what we did initially was build executive dashboards to those – for those – defined managers, which were accessed through the Cognos portal. And, we chose to a delivered and an incremental approached deployment as opposed to the all-at-once approach because, remember, we were bringing folks from looking at compliance management to performance management.

And so, instead of inundating everybody with all these reports, we would start with one report, work with that, have folks get a really good understanding about how to use the tools. There was training on the tool itself and then how to use the information that they were being presented to affect practice.

The first priority for development was the Federal CFSR outcomes. So, how it works – basically, there's a – they identify – oh I was supposed to say next slide, I'm sorry – how it works is identify specific data elements required to support a predefined business need.

You don't fit everything from your transactional database over to your warehouse. That would be very intensive. So, really, you're just looking at pieces of information that you're going to be reporting on later.

Umm, so once you take the live data required – what is required for the reporting – it goes into a date mart, or it could be in the transactional database depending on your reporting needs and there are several methods. One, there's the snapshot method such as your AFCARS information, it's static data. You don't want to be changing the data that you have stored for your AFCARS submission. It's not going to be useful if you do that. So, the AFCARS data that comes over is a snapshot, it doesn't change. But there is some data that you want to update as a point-in-time data. It could be your monthly caseworker visits. And, I think, if entered, you want to see next month, what changed.

Or, if you need something, like, immediate, you really need the live data, such as we have a critical incident report and, in addition, we have a current monthly worker visit report where we show all the kids that need a visit for the month and whether or not they've had a visit. So, that it's a proactive report for management so that they can tell – you know – what child needs to be seen and where they are with their visits and meeting that federal requirement.

And, to all of the above steps provide the basics needed for creating the management reports. Basically, once the data gets in to the data mart, then you can run your reports.

So, when we go– oh take a look at the time – I'll give you guys a couple of examples of some of our reports in RAILS, but at this point, I'd like to turn the slideshow over to my esteemed colleague, Stephanie Lindley, who is the FACTS IT Manager over Reporting.

Stephanie Lindley: Hi, everyone. As Traci said, my name is Stephanie Lindley and I'm a program manager for FACTS dealing primarily with the reporting. Umm, as Traci mentioned, we started off in Cognos with developing the CFSR reports. If you could advance the next slide, please. We used the data from our NCANDS reports, our AFCARS reports, and our state data profile to come up with our CFSR reports.

Next slide, please.

Umm, this is our CFSR report. As you can see, there are five tabs to the report each showing different measures or different views for the CFSR. The tab shown currently is the CFSR Safety Measures. If you mouse over the name of the measures you would see a description of what that shows next to the name of the measure. You see the trend link. If you click on that, it brings up the trends from 2006 forward of where that particular measure has been. The county link would bring up a map of the state with the county lines and it would show you where each county falls in that particular measure.

Then, next you see the green dots, those are our performance indicators. They give us a quick, at-a-glance look at how we're doing. Of course, you know, green is good, yellow means we’re – you know – we need to do some work, and of course, red, we're way below the national standard for where we should be.

And then the last few columns, of course, are the numbers that are used for the calculation to get at our percentage. And then the last one is the national standard for which we are comparing ourselves to. And then, also, at the top, you would see a drop down and that just allows you to toggle between the various years.

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The next report we wanted to show you is our C2.5 permanency measure report. It shows you the length of time between the termination of parental rights and permanency. If you could advance, please.

Here, you could see that we have the report broken out into separate widgets. Each widget is a different timeframe of lengths of time. You see the less than 12 months, 12-to-24 months, 24-to-26 and so on. Within each widget, the chart is then broken down into the age ranges of the client. This allows you to get a feel for how long it takes each age range to achieve permanency.

Also at the top, you'll see three drop downs. These allow you to drill-down to the various case plans such as adoption or legal guardianship or you can also drill-down between the various regions and counties.

Next, please.

This next report we want to show you, it's called "The Cadence Dashboard." The Cadence reports came about because our former Commissioner, Jason Najmulski, wanted a dashboard that he and his management team could look at during a conference call every Monday morning. He called them his "cadence calls." They wanted to highlight some trouble areas and brainstorm ways to fix them and then, later on, they would remove those that they felt were inline and add new areas that needed scrutiny.

He came up with his four highest concerns to start with and this became the Cadence Dashboard.

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The four reports originally chosen were NYTD report, caseworker visits, open referrals open over 30 days, and the open referrals with no contact.
My colleague, Shannon Richards, will be discussing the NYTD report in just a few minutes. I wanted to discuss with your our caseworker visits report.

This report came about as a way to show how we were on our every-child-every-month stats. When we first started the report, it showed that we were around 20% of our clients. That's not necessarily that our clients weren't being visited; maybe just the contacts weren't getting entered into FACTS. Since that time, we have worked with the field and we are now up to 97% which, I think, is amazing. It just shows how we have been able to use this Cognos tool as a success.

As Traci mentioned, another flavor of our caseworker visits reports is the current visit. This report shows that, for the current month, all of the clients that required a visit, those that have been visited during the current month, and those that still need to be visited. This data pulls directly from our SACWIS system so it gives the workers a live look at who all they need to see without waiting for the report to refresh tonight or next week, etcetera.

All of the reports that I've shown you have the drill-down or drill through capability. This capability gives the user the ability to see the detail of the data behind the graphs and the charts. These reports drill-down from the state level to the regional level, county level, supervisor level, worker level, and in some cases the client level. This ability shows – allows – a regional director to see which of his counties are outliers; a supervisor can see which of their workers might need some additional assistance or training. It just – there’s – they can do anything with it.

Now, I'll turn it over to Shannon Richards who will discuss her NYTD reports.

Shannon Richards: Hi, everyone. I just wanted to give a little bit of information as it pertains to our NYTD reports. This is an example of a report which is created via live data. This report was developed to assist management in tracking both the baseline and follow-up population. Upon opening the report, it defaults to the current reporting period.

The end user can toggle between reporting periods and population. This report allows the user to know at a glance the current outcome status. The graphs provide a drill-down of information by clicking on each section. This drill-down provides case and client specific information. In addition to the report, we offer a link to the report description and NYTD reporting schedule.

I'm now going to turn this over to Patty Vincent. Patty is going to provide some highlights from a manager's perspective on how the reports are utilized.

Patty Vincent: Thank you. As Shannon stated, my name is Patty Vincent and I am the Office Director of Social Service Programs for the Bureau. I have been employed with the Department for over 30-some years and, when I first became a manager, we recognized that we needed the need for data but we did not have Cognos at that time. What we had to rely on was tracking logs and hand counts and, of course, we know that they were not accurate, it was time consuming to gather all of that information and, not only that, but when we did gather the information, we weren't gathering the information that was useful. We were just gathering information to gather information.

I was really excited when we first started with Cognos. We first started with the dashboard and what that was we started with looking at face-to-face contact with child in placement every month. That was – I think that was the start of what we started with Cognos and, from that, it has really evolved over the years.

And, what we do now is that, within the Cognos, we have a lot of different reports. There are several reports that I use daily, some that I may just use weekly, and some that I may look at monthly. Some of the reports that I look at on a daily basis under the Cadence report is the "Open Referrals over 30 Days." What this is, this gives us an indication by county of the referrals that have not been cleared over the 30 days and this is an ongoing count.

What we could look at, we could look at the counties to see where there might be a specific problem and then it will drill down to the worker so we can identify the worker, we can identify the referrals that are over 30 days. We can use this to see if we need to send more resources into that county. What do we need to do to help that county?

Some of the other reports that we use, as Shannon already talked about, the NYTD reported, the caseworker reports; these are the visits by caseworkers for the children in care per month.

Another report is the workload detail report and, again, this is a report that indicates by county – it gives you the worker, it gives you what their caseload/workload is at the beginning of the month, it will tell you how many referrals they have been assigned, how many referrals they have been able to close, and at the end of the month, how many referrals that particular worker has pending.

Again, this will drill down to the worker and it gives you an indication that there is a worker that is struggling. If there – you know – it gives you the ability to ask a lot of questions on what is going on. What do we need to do to assist the worker, to assist the county, with getting this cleared?

One of the other reports that we look at is the referral report. And, what this is – this gives you per county, again – it tells you the number of referrals that were received and then the number of referrals that were accepted per month. And, this goes back to the year 2009 to the present. This is used – you know – a lot of times, we have requests come in; people want to know, the media, if you have information, the freedom act, of wanting to know how many referrals you receive per month per county. – that’s very useful for that.

Also, in the last couple years, we have implemented centralized intake, and we have been able through this report, to take a look at whether or not the rate of the acceptance of our referrals – since the implementation of centralized intake – whether that has increased, or stayed the same, or decreased. Again, we can look at it by county and determine if there are any specific ccccc within that.

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And, what we do, another thing we take a look at, some of the other reports, are the time to first contact report. And, that report gives us an indication of, again, through the dis—through the county, whether they're making the contact, the initial contact, within the 72 hours and, again, we can look per worker, we can look at the county to determine any trends or any issues that may have been determined.

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As Traci was stating, we have a critical incident report that we can use to – it lists our critical incidents. It gives us specific information and it goes back three years, so that we can take a look at what has occurred in the past.

Foster care placement trend reports. We have the foster care age and gender report. This is the report where we can take a look at our age grouping of children that are in foster care. What we have found out is, through this report, we take a look and we have found out that our highest population of children in foster care, their age range is from 13 to 17. Our next highest age group is from one to four years. From this, we can take a look to see do we need to recruit specific foster homes for these age groups? Do we have enough foster homes for these age groups? What are the trends? Do we have enough services, enough resources for these age groups?

We also can look at the caseworker visits for child protective services, and for youth services for the work, you make visits with children that are still in the home. We take a look at that for safety. We have reports for in-state and out-of-state placements. With the foster care, we take a look and see permanency. Are we giving our children permanency in a timely manner? Are they being transferred to an adoption specialist timely? Are we getting the adoption consummated in a timely manner? What do we need, again, specific recruitment, for the adoption?

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As I said, we use all of these reports and there are many, many more reports within the Cognos system that we use but those are kind of the highlights. But, we use all of those reports.

One of the things we do is we take a look at staff allocations. We take a look at that. Do we have our staff in the areas that we have the highest productivity, that we need the highest volume? Do we have our staff allocated correctly? Productivity. Are we having issues with productivity within the county? Are we having issues with productivity with workers? And, that leads to more questions of, you know, what is the reason for either the high productivity or the low productivity? We can take a look at that. We can identify trends. What's the reason we have so many removals? Take a look at all of that.

We can analyze strengths and identify any problems that we have that may be due to policy or practice issues. We can identify the need for specific services. Also, training needs. Do we have – we can identify specific training needs that we may have. And this can also help managers to prioritize and reallocate their resources.

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Along with this, we also use this data with our CQI. We prepare – you know – when we have our CQI council, we prepare a different data that we've loaded with our council members and go through all that. We reviewed data at our statewide management meetings, at our regional management meetings, unit meetings. It's also used at supervisor/worker conferences. We use data to help with recruitment. That could be recruitment with workers. That could be foster care recruitment. That could be resources, services. It also helps with training and workload management.

I'm going to turn this back over to Traci now.

Traci Dean: Thank you, Patty. As you can see, the state FACTS are really looking at the reports, utilizing the data in their day-to-day management – you can, umm, whatever next slide. We're going to talk a little bit about FACTS benefits. Patty has talked to you some but I'm going to kind of break it down into an executive leadership perspective, end user perspective, and our technical perspective.

For executive leadership, it provides a measurement of outcomes that leads to outcome-based solutions – how they're utilizing the data to influence policy programs, outcomes, to make management changes and, basically, to create a learning organization. Look at the data, learn from the data, make those changes that are going to positively impact children and families in West Virginia.

Another thing of the benefits that they like is they can be proactive in making those changes. Before, a lot of the reporting was after the fact and you can't change something that has already occurred, but the reporting that we're doing now is more proactive so that they can see at a glance more quickly the areas that they need to react to. They can manage compliance especially against the Federal standards to make sure that we're meeting those.

It also provides the ability to identify quickly and to correct those negative trends and the ability, as Patty said, to measure efficiencies or inefficiencies that may be going on. And to align the business strategies to the organizational and strategic goals. All important factors for leadership.

From an end user perspective – next slide – the tool pretty much is easy to use for them, we've feedback on that. They really, well they had some training, they were able to pick it up fairly quickly, and what they really liked was their ability to not just look at stale data, stagnant reports, they could take the data, it was interactive, and they could look at it sliced and diced in a different way down to that region, county, worker level to make it meaningful to those folks.

They liked the trends indicators so that they can see how their performance is being evaluated against the standards -- the national standard, statewide standard, the region standard, and even within a county standard. They liked that it's able to generate aggregate views, so that the management can, at a glance, kind of see the state of their business.

They love those dashboards. And again, the drill-down capability was also very, very well received because then they could say, okay, I have this negative or positive trend, let me see who's doing well, who's doing it right, how can I apply that to other places? And, of course, again, the easy-to-read dashboards, they liked that. A picture is worth a thousand words, as they say, so they can tell quickly, at a glance, if they're doing well, if they're in the green or if they're in the red, they know they need some improvement or some attention paid to that measure.

They like that they're able to customize and standardize some of their reporting to make it fit for them. For example, you know, even though a lot of it presented at a statewide view, they could pull it down to that county worker level and customize it for what they need to see.

The other thing is that it saves a lot of time reducing their creation of multiple reports. They don't have to do a lot of printing. It is there on the site. They can pull it down and it's the most up-to-date and current information that we have. And, of course, from that, they can disseminate, if they need to, detailed reporting.

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From a technical perspective, we like that it has that onboard analytical capability. I mean, before that, we were dealing with special programs and all that, looking at the mountains of data. We like that it has the data visualization capability. It's easy for us to generate the pictures of powerful dashboards and powerful pictures of performance. It is one product to maintain so that makes it very handy and straightforward development. You test the report, if it's good, it’s immediately out there in production available for those folks who are defined to be able to access the reports. It really has resulted in a lower amount of coding which lends itself, really, to more agile report development.

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So, lessons learned? One of the things that we've had issues with, difficulty in procuring and retaining programmers and DBAs with the skills sets needed to maintain a BI tool and report. Not unlike other states, purchasing and procurement is a struggle especially where funding is so tight. Initially, FACTS lacked technical analysts and DBA staff with the necessary experience and skills set for developing and implementing a Cognos BI solution. So, as a result, we had to solicit procurement for one contracted staff person to develop the dashboards and all the reporting contained within Cognos. This contractor was a shared resource with our child support, and so, was responsible for reporting for both of our systems.

The child support system has a state employee who is being trained to help take over the development for them; however, FACTS still uses contracted staff for new report development and maintenance. And, unfortunately, we have not been able to build the expertise within our state technical resources. There are a couple of reasons for that. High turnover, continued staff shortages and, honestly, limited funding for technical resources makes it difficult for us to compete with market ready because they can leave us and make a lot more money and it is very attractive.

You know, to combat that, though, we continue to post interview candidates and we've looked at non-traditional staff recruitment methods – jobs fairs, working with the colleges, internships – and we also have a new statewide contract being reviewed to help with procurement issues related for contact staff.

Next slide. Oh wait, no, sorry. Stay back one slide. I meant to…but go ahead.

Another lesson learned is making the data warehouse scalable. That is really important. You want to be able to have the flexibility to grow with your data as you need. Yes, as Patty said, we started small, but there are many reports in there now and the database needs to be able to scale to handle that and the warehouse needs to be able to scale to handle that capability.

The other thing that is important is to develop report maintenance plans where the reports are evaluated for usability, applicability, perspective, and need. We have a lot of reports in there that we're tracking initiatives that are now fully implemented and in practice. No longer really – those reports are no longer really needed in that flavor. They need more of a maintenance flavor. So, we really need to take a look at that and pare down the reports we don't need or the ones that might have been a really good idea when you first started but, in practice, maybe really wasn't as informative as you originally intended.

And it's extremely important that you have clear and comprehensive documentation on what data is being extracted, transformed and loaded -- the ETL -- and the schedule that it's happening and the intended measure.

Cognos for us was developed with the project management office, originally, and a lot of the folks that did the original development have retired or moved on, so a lot of that business knowledge that was there at the beginning isn't here now. We have some. And so, having that kind of documentation is just critical.

So, the next slide?

The next step for us in regards to Cognos? Short range, we are in meetings with BCF, we're evaluating the current reports, reorganizing the existing reports in a little bit more friendly manner, kind of how it makes sense to them. We're updating some of the reports to add additional features for them and we're also in the process of developing new reports especially along the lines of those initiatives that are not fully implemented.

Long range, we want to look at doing more scorecarding. We also want to be able to support the Bureau's initiative for results-based accountability and we'll be having some reports for that. Also, disaster recovery, being able to generate reports if there's a natural disaster or whatever here so that we can show where foster kids are at, what are the investigations that are currently underway so that we can pick back up and go business as usual. Paperless – or without paper.

The other thing that we are very interested in and have been from the beginning is the creation of those supervisor and worker dashboards. That is one of the things we'll be working with BCF to determine what's important for a supervisor and what are the measures that they need to see and what is important for a worker and being able to create those for folks.

So, overall, we're very pleased with the Cognos BI tool. End users have been user to quickly pick it up and to understand the reports and to be able to use those reports to analyze data. We've only just gone over a few of the reports that we have in Cognos and we'd be happy to talk to anybody in more detail if they have more information.

At this time, this concludes our presentation. I would like to hand it back over to Joyce.

Joyce Rose: Well, thank you, Traci and all of the West Virginia staff. And, while the introduction was disrupted, certainly, the content of your presentation was extremely interesting and it flowed quite well. Thank you to you all. May we please open the phone lines and the chat to our webinar attendees for the Question-and-Answer session with our presenters?

Coordinator: The phones lines are now open for questions. If you would like to ask a question, please press Star 1 and record your name. If you would like to withdraw your question, press Star 2. Thank you.

Elizabeth Mertinko: While we're waiting for people to line up on the phone, I do have some questions that came in online via our chat feature. The first one is, are BCF management reports visible by actual workers and, if so, -- a two-part question --what was their reaction to having this information so visible? Is it visible by all of their coworkers?

Patty Vincent: I'll respond to that. Yes, they are visible and, at this point, they do like it. It has been an adjustment over the years to see this but, yes, they have adjusted very well.

Elizabeth Mertinko: Next question. Did you survey or involve local managers in helping to design the suite of reports that you developed?

Patty Vincent: I think at the time it was such a new process that there was some involvement but not as much at that point. Now, we're in the process of going back through all of the reports and involving people, kind of, to taking a look to see, you know, as we have evolved, some reports may no longer be needed. We may have to change some. Our needs are different at this time. So we're in the process of taking a look at what reports that we do need now.

Elizabeth Mertinko: Do we have any questions on the phone?

Coordinator: I'm not showing any questions at this time.

Elizabeth Mertinko: Next, from our online chat, have you gotten feedback from the field that they're doing less of their own spreadsheet tracking or white board tracking now that they have more relevant and timely reports from Cognos?

Patty Vincent: That is correct. They are ecstatic that they no longer have to do all of the tracking forms and all of the hand counts that we've had to do in the past. So, yes, they are very excited about all that.

Elizabeth Mertinko: So, when you walk into people's office, you don't see tracking as much on the white boards anymore?

Patty Vincent: No.

Elizabeth Mertinko: I'm just going to own up right now that I don't entirely understand this question but I will do my best to convey it to you all accurately. How much of the calculation logic for aggregating metrics is run in an overnight ETL and cube building process?

Traci Dean: We have – I have our technical manager here Lesa Mercer, she'll respond to it.

Elizabeth Mertinko: Fantastic.

Lesa Mercer: I'm not that familiar with all this either but I think most of our stuff happens overnight. We do have a couple reports that are live as an application but I would say probably 90% of the stuff happens at night.

Elizabeth Mertinko: All right. Ted, do we have anyone on the phone with questions?

Coordinator: I'm not showing any questions at this time.

Elizabeth Mertinko: Okay. And, could you just remind everybody, again, how to queue up for questions on the phone?

Coordinator: Sure. If you'd like to ask a question over the phone, please press Star 1 and record your name.

Elizabeth Mertinko: Alright, wonderful. And you're also welcomed to submit a question via the chat feature which is in the window over on the right of your Go-to-Webinar screen. The next question. What kind of training did you provide to staff on how to use this?

Stephanie Lindley: We went around to different offices and provided hands-on training. I developed some how-to guides that we have links to within the Cognos system. And then, I know we brought in, like, our regional directors and just had them sit in the afternoon for an hour and let them play, do whatever they wanted, and if they had questions, we were there to answer.

But it – basically, it's just we let the field have it and, if they wanted additional training or they had questions, we provided it. We just, basically, left it up to them and whatever they needed; you know, we would go to the office if they felt they needed training.

Traci Dean: The other thing, too, is that Commissioner Najmulski, was – he incorporated this into his meeting structure so they would be looking as a group at the data and not just looking at the different measures but really asking questions about why is this measure this way, why is it different in this county, and really, thinking about the data in a different way.

So, by doing that, I think that he kind of led by example and, with his staff, helped them work through asking those questions and having his staff go down to their staff and incorporating that into how they were managing. It wasn't just the training, it was really incorporating this into the business process and how they actually work with staff.

Elizabeth Mertinko: Mhmm, okay, excellent. What kinds of data quality problems have you discovered in the course of building these reports? That's a fantastic question. [Laughter].

Traci Dean: That is a fantastic question. I don't know if I want to own up to it. [Laughter].

Elizabeth Mertinko: They're all good questions. It's such a good question we're just going to skip right by it.

Patty Vincent: I swear, I think coming from the field perspective of making sure that staff understand how to enter the correct data because I think we have a lot – we started out with a lot of – worker error when entering information. That is not as prevalent as it was. I mean we – every now and then, it hits again, but it's just going back and doing some refresher training on the specifics of entering the data.

Traci Dean: Right. I think, initially, like Jason, I mean, did have, there was some fear, you know, originally with workers saying, “oh, it's going to highlight everything that I did wrong,” but really, the approach was not like a punitive approach. They really wanted to see what was going on and to work with folks. And, that is how, as Patty said, they could identify training issues to help, you know, alleviate some of the data quality issues that were going on.

Elizabeth Mertinko: Excellent.

Traci Dean: So, they were proactively working with it and I think that's key. I mean, if it becomes a real negative, punitive approach when you're trying to do this, you're not going to get the buy-in and people will be fearful of it.

Stephanie Lindley: Right.

Elizabeth Mertinko: Mhmm, mhmm, okay. Ted, do we have any questions on the phone?

Coordinator: I'm not showing any questions in the queue at this time.

Elizabeth Mertinko: Okay. And, remind me, again, press Star 1 to line up on the phone for questions?

Coordinator: Yes. Press Star 1 if you'd like to ask a question and please record your name.

Elizabeth Mertinko: Okay. Or you're welcome to use the chat box in the Go-to-Webinar feature. The next question we have up: Do you see a difference in the use of reports across regions?

Stephanie Lindley: Ooo, across regions? That I'm not sure.

Elizabeth Mertinko: Or, I guess, any differences in how places use reports? Maybe it's not across regions. I don't know if there are certain populations that use them in different ways?

Patty Vincent: I think that might have something to do with a specific district or region might be interested in a specific measure or outcome, you know. They might be more interested – if an agency was wanting to apply for a specific grant then that district or region would be looking maybe for specifics to give them the data for a grant application.

Elizabeth Mertinko: And that actually transitions really well into the next question. You had said earlier less time encoding. So if one of your staff asks for a new report, is there some sort of average estimated time that you can say so you can have it in X days or X number or hours? What does that look like?

Traci Dean: That actually depends on the report and the information being requested and whether or not that data is already in the warehouse so or whether it needs to be pulled from the transactional database. That's just going to depend on the report request.

Elizabeth Mertinko: Our next question is how has data driven workforce development impacted worker morale?

Patty Vincent: As Traci said, we us that not as a criticism not to be punitive. What we do – we use it to identify where we can assist staff and I think that with – especially with like the referrals that have got to be within 30 days – we can go in and maybe give that district extra staff to assist them during that time or we can work with doing a plan with that district to get the referrals completed – the assessments completed.

So I think that in a sense yes, it has helped morale because we're better able to identify which districts need the help and to know how – and to identify the means to help them.

Traci Dean: The other way too is there's - it also shows positive trends so they're able to reinforce those workers that are doing really well and that's been very well received.

Patty Vincent: Yes.

Elizabeth Mertinko: That’s a really important point. I think our minds often jump to where the struggles and where the challenge is but, you know, the data – you can use them both ways. You can also, as you said, use them to identify the positive trends so I think that’s a really excellent point.

Going back to the question about building new reports. When you have multiple requests for reports to build, how do you prioritize which ones get built first, or get built at all?

Traci Dean: Again that depends on the report and who’s requesting it. So if it’s something the governor wants, of course that gets done. [Laughter]. I’ll be quite frankly that one gets done first, you know. And then we actually work with the BCF leadership team to help us prioritize what the reports are that we need to work on.

Elizabeth Mertinko: Okay. Ted do we have any other questions on the phone?

Coordinator: Yes, there is a question in the queue from Marquis. Your line is now open.

Marquis: Hey guys. This is awesome by the way. I just have a question. Are there any insights that you gather that you can act on so like really, really solid data points that you would love to act on but you can’t?

Stephanie Lindley: Ooo. That we’d love to act on but we can’t. [Laughter]. We’re thinking.

Traci Dean: Yes, yes.

Patty Vincent: We have that we'd like to act on. And I'm not sure that I'm understanding the question correctly. I think what I – first off I'm thinking about getting children to permanency in a more timely manner. We have that data, but we can't always, due to outside forces such as legal requirements, you know, resources. We may not be able to get that child permanency in a more timely manner. Does that answer?

Marquis: That was perfect as an example of like – because there's a lot of data elements that are positive that you would want to act on. So like I know a lot of times maybe due to resource constraints or specific laws, you may not be able to do it and I just wanted to know if there were specific ones that you couldn't act on in a way that you would like.

Patty Vincent: Yes, that would be one.

Marquis: Thank you.

Elizabeth Mertinko: Ted do we have any other questions on the line?

Coordinator: I'm showing no further questions at this time.

Elizabeth Mertinko: Okay, we have more that have come in via the chat feature. So are other state departments or divisions – HHS divisions – using the same tools or systems and if so, how do you deal with data sharing and governance?

Shannon Richards: We have three other applications that are also used in the Cognos tool but our databases – our data marts – are separate so we're not sharing that data.

Elizabeth Mertinko: Okay. I think that answers the question but to the person who asked, if you want to put a follow-up question in the chat box, you're welcome to do so. Next question: How do you pick which metrics to show together?

Traci Dean: Those were actually determined by BCF leadership. At the time that's one of the things that we're reevaluating as part of that and a lot of them were based on the federal reporting and the measures that they were interested in at the time and they basically selected the goals and the outcomes that they wanted to measure and then they put the goals and the data elements that would satisfy that. Those were determined when they originally brought up Cognos.

Elizabeth Mertinko: And in a related question – different person asking – have you started trying to build the new CFSR indicators and if so, have you run into any issues?

Stephanie Lindley: No, we have not. That is on our list to do. We just haven't been able to start working on that yet.

Elizabeth Mertinko: Okay. Again sort of a related question – can you talk about the level of effort for building, customizing and maintaining reports and dashboards? Do you use state stuff or do you use contractors to provide this service?

Traci Dean: We actually use contractors at this time. We don't have any state staff with the skills and the expertise. We actually were really down faced staff for a while, you know, due to, you know, folks leaving and just really not being able to hire. It's harder for us to compete with the market rate as I said earlier. We would love to be able to bring someone on board on the state side and be able to have them take that over but at this time we don't have a resource for that.

Elizabeth Mertinko: Okay. Ted do we have anyone on the phone?

Coordinator: I'm not showing any questions in the queue at this time.

Elizabeth Mertinko: Okay, next online question. How much time do users spend looking at the dashboards?

Stephanie Lindley: That's a good question.

Patty Vincent: That varies. There are – like myself – I'm on it quite frequently. Others, you know, it just depends upon management style on how often they get in there and use it. It's really – and it depends on what information that you need. So it varies from manager to manager.

Elizabeth Mertinko: And Ted I'll check with you one last time to see if we have any other questions on the phone.

Coordinator: I'm not showing any other questions at this time.

Elizabeth Mertinko: Okay and we've responded to everything that has come in. Oh actually just a few more popped in. Did you need to provide, or do you feel like you currently need to provide, training on how to use the data? So not just what reports are available, and how to get to them, but then how to interpret them and understand them?

Patty Vincent: Yes and I think we do that when we use them, like when we take the data to our CQI meetings, when we take the data to our different management meetings and go through the data and talk about it. So I think that's how we take a look at it and we analyze it and we learn about it.

Traci Dean: I mean I think it's a continuous process. I mean I really do. I think that's something that they do every time they're looking at the reports and, you know, I mean cold they benefit maybe from some more training? I mean that may be a question that would take more talking about the development of the new reports and the modifications. Maybe we need to consider additional training needs.

Elizabeth Mertinko: And I think this may be sort of a variation of the same sort of question but I'll put it out there for you. Do users have access to the business logic documentation that is do they understand how the metrics were calculated?

Stephanie Lindley: On the CFSR – on the CFSR for each individual measure you can hover over the name of the measure and it gives a description of what it is and how it's calculated. That report I know does. Some of the other ones, not really but there are help files that kind of explains it.

Shannon Richards: And report descriptions.

Stephanie Lindley: Yes, report descriptions and such.

Traci Dean: That's one of the things of our lessons learned that we put in there is that to have really good documentation on how the measures are being pulled, how the elements are being calculated, the refresh frequency, the intended purpose of the report. That's something that I think that we need to focus on and improve upon.

Elizabeth Mertinko: Okay. Ted do we have anyone else on the line?

Coordinator: Yes, there is a question in the queue from Marquis. Your line is now open.

Marquis: Awesome. I just wanted to make sure that the presentation was going to be shared so that way if you want to sort of review it later, we can.

Elizabeth Mertinko: So if you look over into the right on your Go Webinar chat feature, you should see a tab for handouts and I've loaded the slides there. I also will be emailing them to all of the registrants for the session today after the session is over.

Marquis: Awesome.

Elizabeth Mertinko: Finally we do record, sorry, we record the webinars and those are made available on the Children's Bureau website and when we're wrapping up today we'll show you the link for where to find those recorded webinars as well.

Marquis: Thank you.

Elizabeth Mertinko: Sure. Ted do we have anyone else on the phone?

Coordinator: I'm showing no further questions in the phone queue.

Elizabeth Mertinko: Okay. Related to the last question – when it isn't the CFSR metrics that you're looking at, who decides how to calculate the metrics?

Stephanie Lindley: Yeah. Probably – I mean just BCF leadership and our technical staff when we're just meeting to discuss it – probably everybody in conjunction.

Elizabeth Mertinko: Okay. Alright Joyce I'm going to go ahead and turn it over to you to start to wrap up and I'll just remind our audience if you have any further questions before we close out for the day, go ahead and enter them in the chat feature. I'll continue to keep an eye on that while Joyce is wrapping things up for us.

Joyce Rose: Alright, thank you very much but I'm going to end with a question before we get to the actual wrap up and that question is the BI related product licensing, training, implementation, operation, etcetera is certainly a major investment. My question is have you been able to do any assessment regarding a cost benefit analysis or at least some metrics regarding the showing the increased business value.

Traci Dean: I have not. It may be something that was available in the project management office because it was originally again developed in the project management office so that may be something that that office can do, I could pass that request on.

Joyce Rose: Okay, thank you Traci.

Traci Dean: It won't be Traci, it'll be Patty. [Laughter].

Joyce Rose: Let's go to the last slide and talk about our little conclusion. We hope – we certainly hope the information shared with you today was both informative and valuable. As a reminder please remember to register for the July webinar once the announcement is released. Additionally if you have any questions regarding today's topics if you would like more information about any of our schedule webinars or would like to volunteer your state as a topic presenter, please do not hesitate to contact me at the email listed above.

Again this webinar has been recorded and will be made available online. When it is complete and posted, we will send a message via the SACWIS

Manager’s Listserv with the link and the link is on the slide that is currently up.

So I want to thank you all for attending and again thank you to our West Virginia folks. Goodbye.

Traci Dean: Goodbye. Thank you.

Elizabeth Mertinko: Thank you.

Coordinator: This concludes today’s conference. Thank you for your participation. You may disconnect at this time.

END