



2021 Results Washington Conference

WINing with Data Measurement

The background features a large, light blue gear-like circular graphic. Inside the gear is a silhouette of a person in a suit pointing at a bar chart on a screen. Surrounding the gear are various light blue icons: a city skyline, a lightbulb, a percentage sign, an information icon, a speech bubble, a magnifying glass, a 24-hour clock, a globe, and a chess knight. Arrows indicate a flow or cycle around the central gear.

Presented by:
Beth Adams, MA, LSSGB



Introduction



About Me

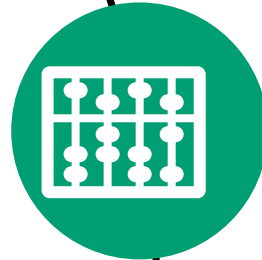
Washington State Department of Social and
Health Services

Wellbeing, Improvement, & Nursing (WIN) Unit

*Aging & Long-Term Services Administration,
Home and Community Services*



Data Categories



Measurable



WIN Journey



Q&A

When it comes to this topic, I know:

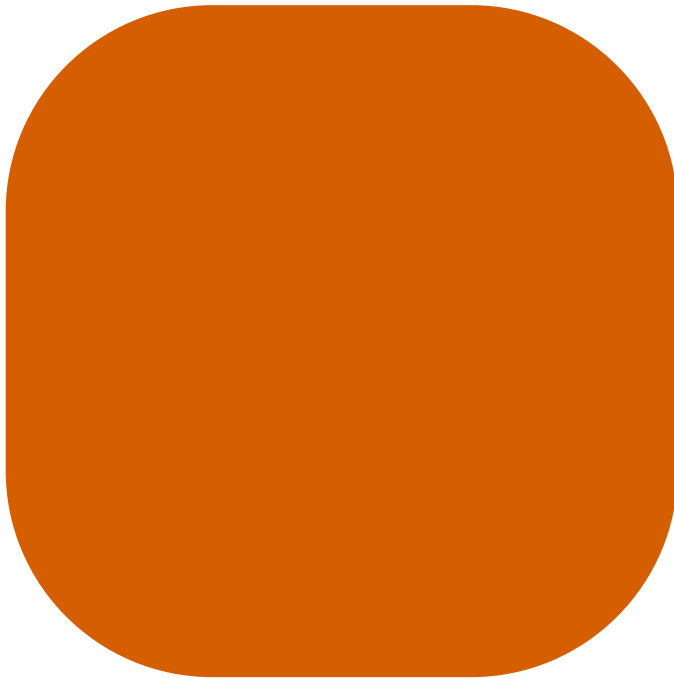
- Nothing/next to nothing; I hate math and numbers
- A little bit, but am not comfortable
- Some, but get overwhelmed if I need to do anything
- A fair amount, but want to be able to do more
- A lot - but am always curious what others have to say
- I'm here to learn about using SharePoint to set up my own tracking system

Data Categories

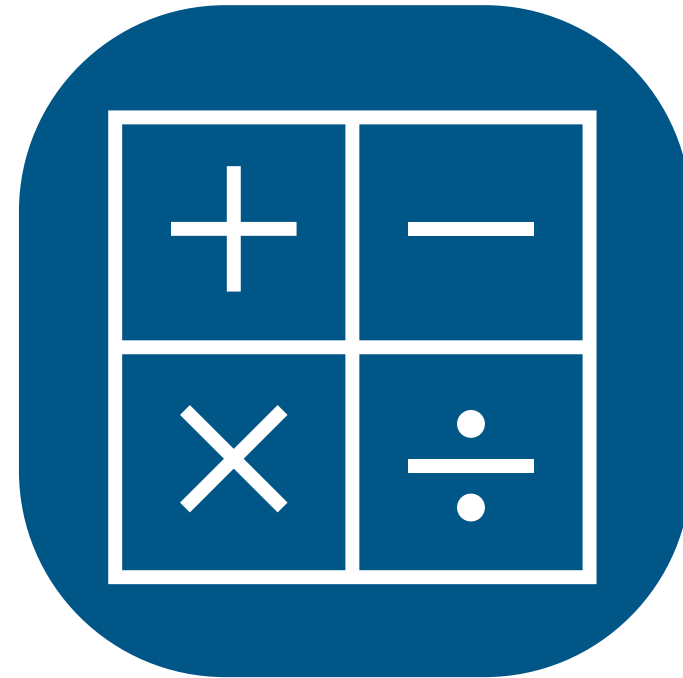


Data Categories

Qualitative



Quantitative



Data Categories

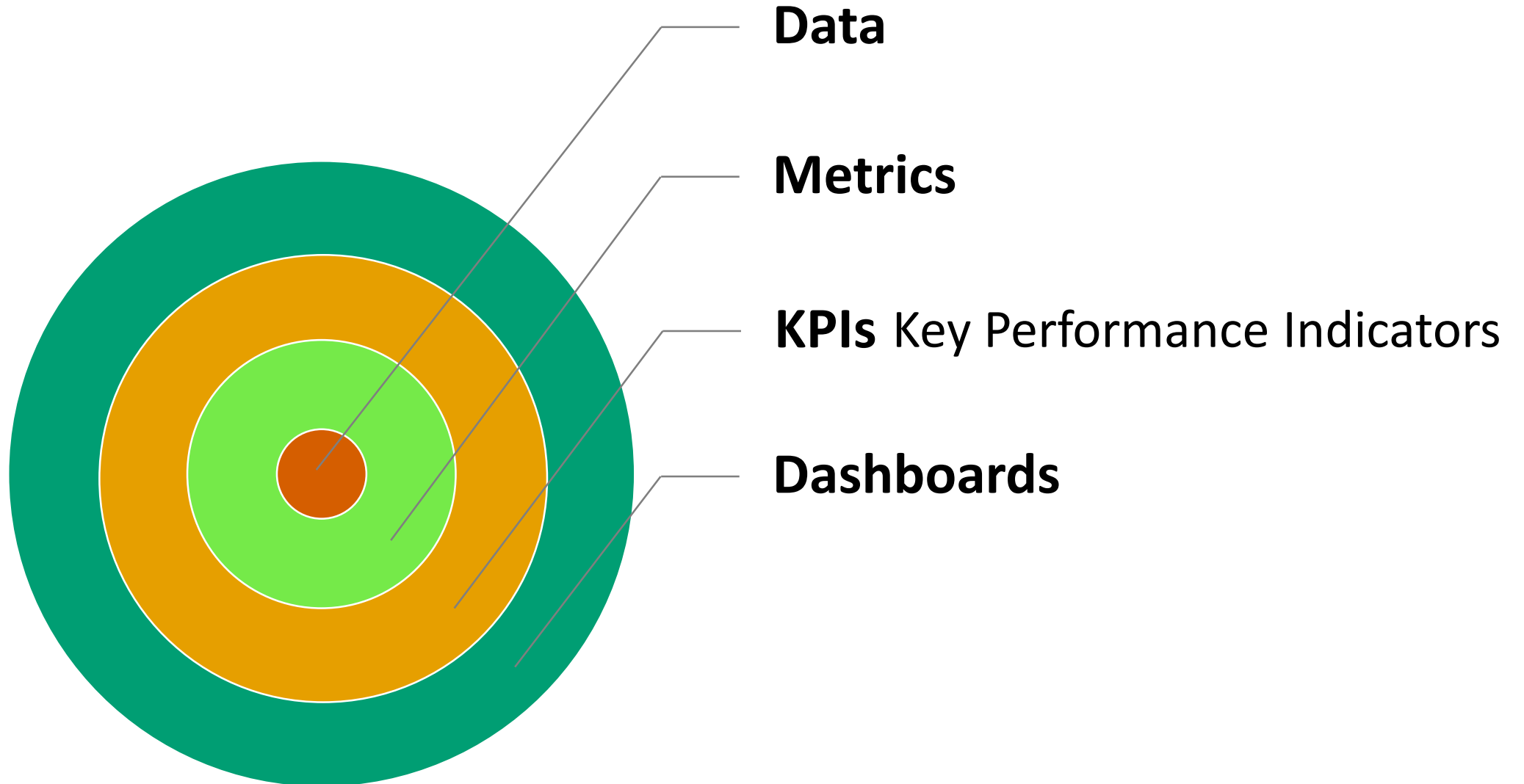
Qualitative

WHY

Quantitative

WHAT
HOW MANY

Terminology



Terminology - example

Timely determination of functional re-assessments

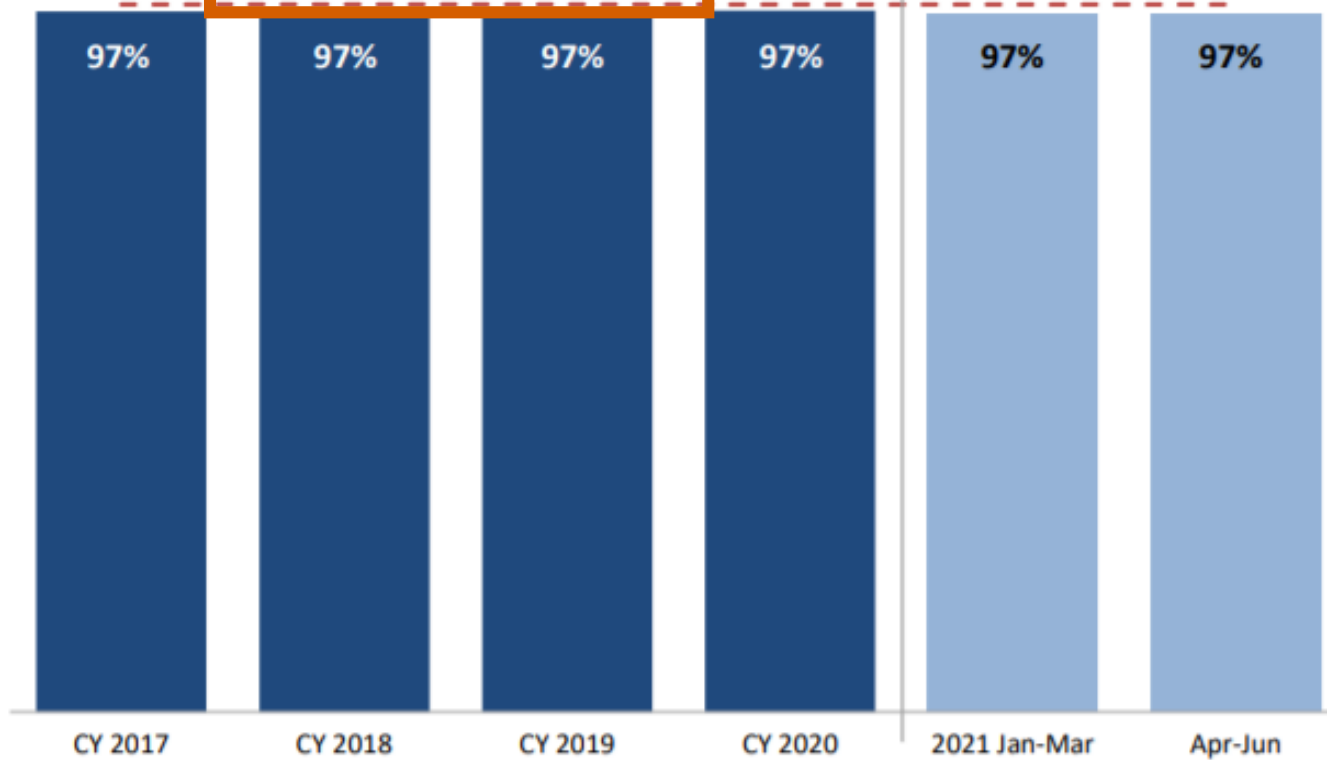
KPI

Percent of timely annual functional re-assessment

June 2023 Target = Maintain at 98%

← ANNUAL → QUARTERLY →

Metric




Data



SMART goals

are measurable



SMART goals

Who will what from
baseline to target by date.



Specific



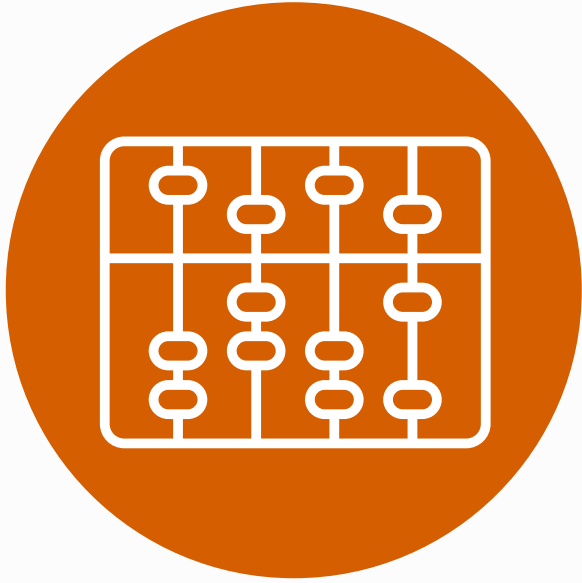
Measurable

Attainable

Realistic

Timebound

Measurable



WHAT



WHERE &
HOW



WHEN

At this point in the presentation:

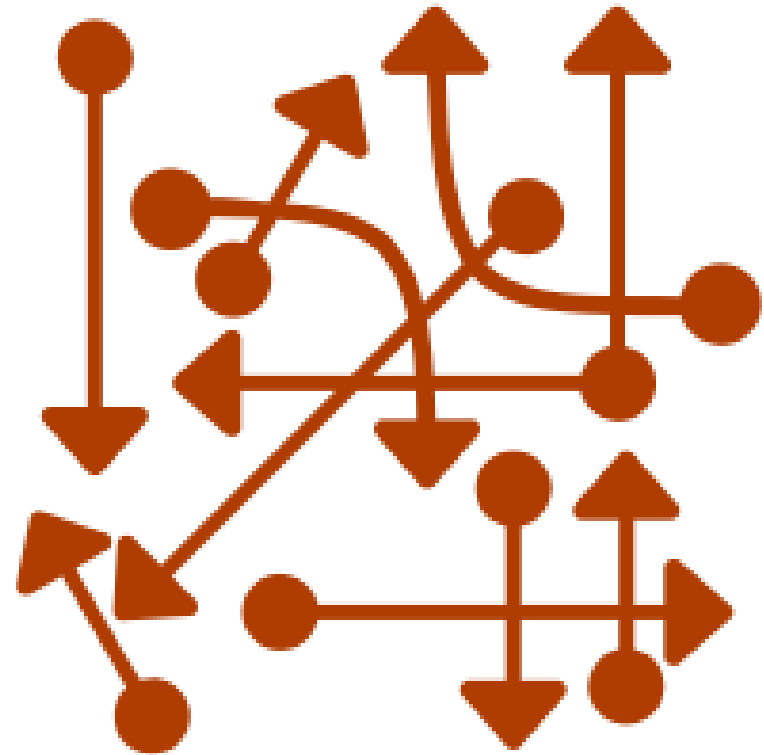
- I learned something new about qualitative v quantitative data
- I still hate math and numbers
- Thanks for clarifying the differences between metrics, KPIs and dashboards
- So that's what a SMART goal is
- I feel a bit more confident with this measurement stuff
- I'm still waiting to learn something new
- My head is spinning - that was too much, too fast



WIN Journey



Background




Background

Challenges

- New, diverse team
- Role confusion
- Ideological differences
- Unknown



| | |
|-------------------------|---|
| Title * | <input type="text"/> Brief description of the reason for the request. |
| Interview Date | <input type="text"/>  Date of face to face meeting with Office Chief and/or problem owner |
| Problem Owner's Name * | <input type="text" value="Enter names or email addresses..."/> |
| Requester | <input type="text" value="Enter a name or email address..."/> Only if different from problem owner |
| Unit Assisting * | <input checked="" type="radio"/> Choose One ▼ <input type="radio"/> Specify your own value: <input type="text"/> Name of unit |
| Request Type | <input style="width: 100px;" type="text" value="Choose One"/> OIS select best fit |
| Routine? | <input type="checkbox"/> Check if this will be performed on a regular basis (e.g. quarterly data report). |
| If yes, what frequency? | <input style="width: 100px;" type="text" value="Select One"/> |
| OIS Interviewer * | <input type="text" value="Enter a name or email address..."/> OIS staff who conducted initial interview |
| Request Summary | <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> 1-3 sentences. |

[illegible]

SharePoint



Group By

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in.
[Learn about grouping items.](#)

+ Add new item



First group by the column:

Assigned SIM

- ☒  Show groups in ascending order
(A, B, C, or 1, 2, 3)
- ☐  Show groups in descending order
(C, B, A, or 3, 2, 1)

Then group by the column:

None

- ☒  Show groups in ascending order
(A, B, C, or 1, 2, 3)
- ☐  Show groups in descending order
(C, B, A, or 3, 2, 1)

SharePoint

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)



Show all items in this view



Show items only when the following is true:

Show the items when column

Office Chief Decision



is equal to



Choose One



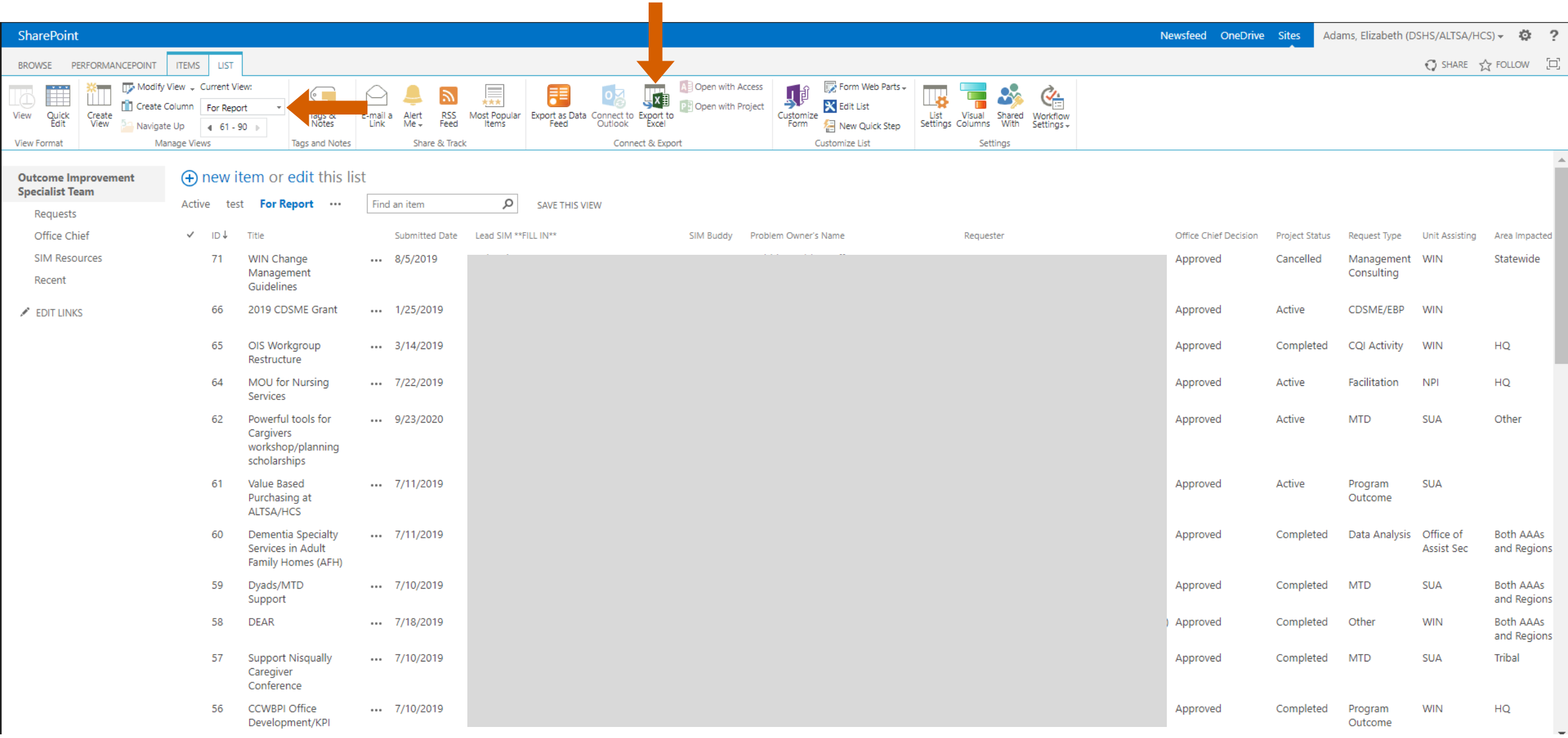
Home & Community Services

Home

AI

SharePoint

21



The image shows the SharePoint interface for a list titled "Outcome Improvement Specialist Team". The ribbon is set to "ITEMS" and the "For Report" view is selected. An orange arrow points to the "Export to Excel" button in the "Connect & Export" group. The list contains 11 items, with a large grey redaction box covering the "Title" and "Submitted Date" columns for items 66 through 56.

SharePoint

Newsfeed OneDrive Sites Adams, Elizabeth (DSHS/ALTSA/HCS) ?

BROWSE PERFORMANCEPOINT ITEMS LIST

View Quick Edit Create View Create Column Modify View Current View: For Report 61 - 90

Tags and Notes Tags & Notes e-mail a Link Alert Me RSS Feed Most Popular Items

Export as Data Feed Connect to Outlook Export to Excel Open with Access Open with Project

Customize Form Edit List New Quick Step

List Settings Visual Columns Shared With Workflow Settings

Outcome Improvement Specialist Team

+ new item or edit this list

Active test For Report Find an item SAVE THIS VIEW

| Requests | ID | Title | Submitted Date | Lead SIM **FILL IN** | SIM Buddy | Problem Owner's Name | Requester | Office Chief Decision | Project Status | Request Type | Unit Assisting | Area Impacted |
|---------------|----|--|----------------|----------------------|-----------|----------------------|-----------|-----------------------|----------------|-----------------------|----------------------|-----------------------|
| Office Chief | 71 | WIN Change Management Guidelines | 8/5/2019 | | | | | Approved | Cancelled | Management Consulting | WIN | Statewide |
| SIM Resources | 66 | 2019 CDSME Grant | 1/25/2019 | | | | | Approved | Active | CDSME/EBP | WIN | |
| Recent | 65 | OIS Workgroup Restructure | 3/14/2019 | | | | | Approved | Completed | CQI Activity | WIN | HQ |
| EDIT LINKS | 64 | MOU for Nursing Services | 7/22/2019 | | | | | Approved | Active | Facilitation | NPI | HQ |
| | 62 | Powerful tools for Caregivers workshop/planning scholarships | 9/23/2020 | | | | | Approved | Active | MTD | SUA | Other |
| | 61 | Value Based Purchasing at ALTSA/HCS | 7/11/2019 | | | | | Approved | Active | Program Outcome | SUA | |
| | 60 | Dementia Specialty Services in Adult Family Homes (AFH) | 7/11/2019 | | | | | Approved | Completed | Data Analysis | Office of Assist Sec | Both AAAs and Regions |
| | 59 | Dyads/MTD Support | 7/10/2019 | | | | | Approved | Completed | MTD | SUA | Both AAAs and Regions |
| | 58 | DEAR | 7/18/2019 | | | | | Approved | Completed | Other | WIN | Both AAAs and Regions |
| | 57 | Support Nisqually Caregiver Conference | 7/10/2019 | | | | | Approved | Completed | MTD | SUA | Tribal |
| | 56 | CCWBPI Office Development/KPI | 7/10/2019 | | | | | Approved | Completed | Program Outcome | WIN | HQ |

| Book1 Excel | | | | | | | | | |
|-----------------------------------|--|------|--|--------|--|------|--|-------------|--|
| File | | Home | | Insert | | Draw | | Page Layout | |
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| AutoSave <input type="checkbox"/> | | | | | | | | Calibri | |
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| High Risk | Cross-divisional project |
|-----------|--------------------------|
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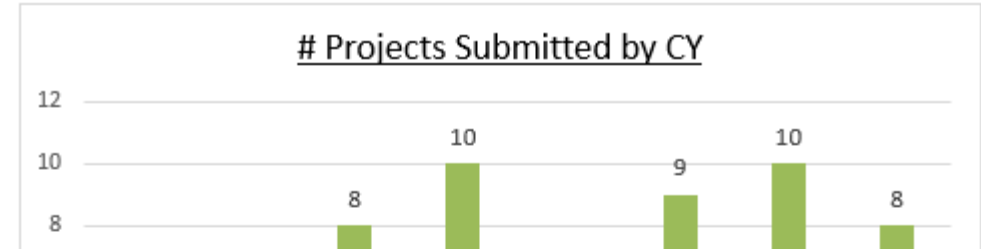
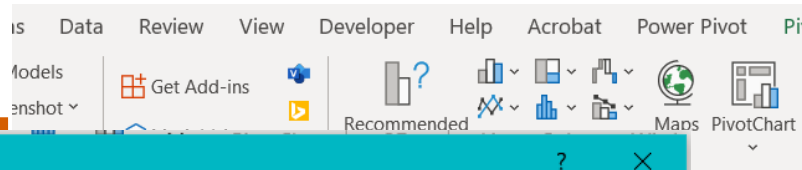
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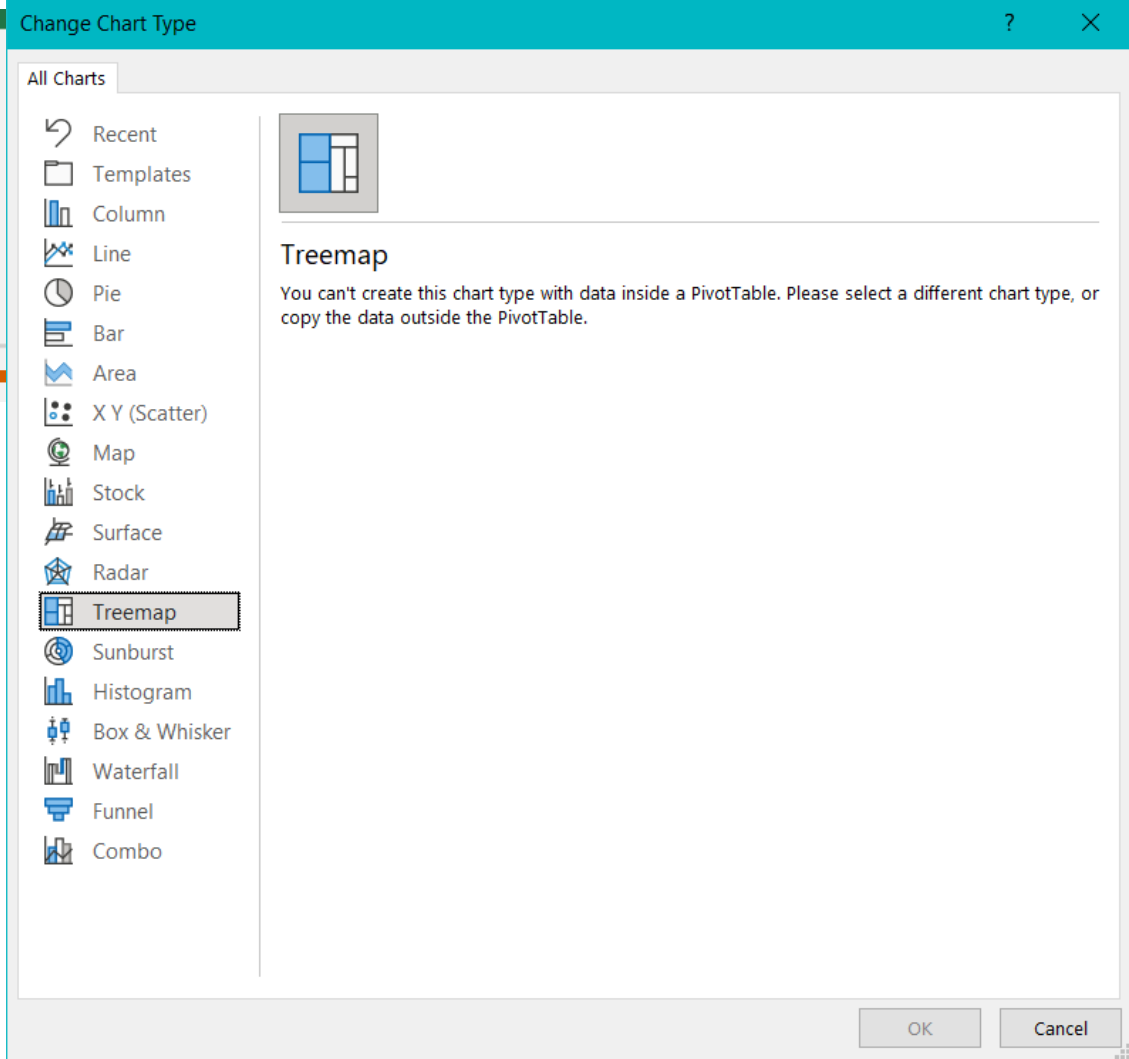
Excel

23



PivotTables & Chart Type Options

- Area
- Bar
- Column
- Combo
- Line
- Pie
- Radar

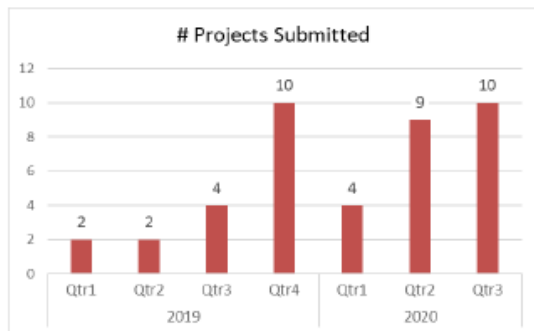


OIS ACCOMPLISHMENTS

REPORTING PERIOD | 9/1/2019-9/30/2020

10 NEW requests were received in 3rd quarter 2020

41 requests were managed in 3rd quarter 2020



“Supporting a Safe Return to the Workplace” has been a huge undertaking. Dawn Shuford-Pavlich and Beth Adams helped with initial research and charter development. Then Montana Salvoni took a deeper dive with implementation through assisting in development of several related surveys as well as co-facilitation of leadership workshops resulting from the survey. Neither the LEI team nor myself had the bandwidth to do this alone. I appreciate OIS sharing their time and expertise for the betterment of all of ALISA.”

— Amy Besel, Organizational Development Administrator



* On hold due to Covid-19 priority shifts, project phase, and problem-owner readiness.

WHO WE ARE

Purpose: To guide change efforts and support the work of HCS leadership, program managers, staff, units, and other entities within Home and Community Services (HCS) or across HCS & other divisions.

To better reflect the breadth of what we do, starting January 2021 we will be informally changing our titles from Outcome Improvement Specialists (OIS) to Strategic Improvement Managers (SIM). SIMs assist with:

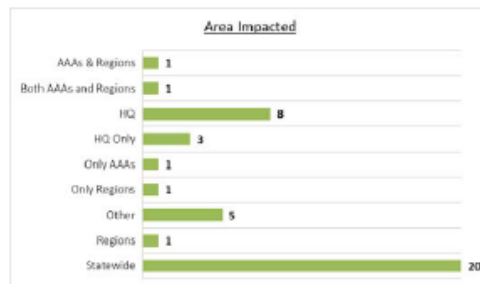
- Continuous quality improvement
- Data analysis and presentation
- Facilitation
- Lean projects and tools
- Stakeholdering
- Strategic Planning
- Training

And help improve/enhance:

- Business operations
- Customer experience
- Leadership impact
- Quality measures

NEW PROJECTS IN Q3 2020

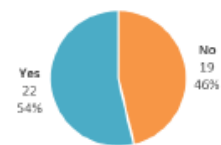
- HCS Remote Client Services Survey Project
- Safe Start @ ALISA-DSHS
- Management Consulting
- NFLOC Data Elements
- ALISA Overpayments 2.0
- SPMP Time Sheets
- Anniversary tracking
- Remote Regional Roadshow
- Covid-19 AFH Testing Process Map
- Powerful Tools for Caregivers scholarships



“HCS Imaging Unit has been completely redesigned. Beth supported us during the concept, design and our recent implementation. With her help we were able to apply LEAN principals, increase our productivity and provide better customer service. Beth’s ability to envision our concept and guide us through the steps for a successful implementation was exceptional.”

— Lorna Sawyer, HCS Imaging Unit Manager

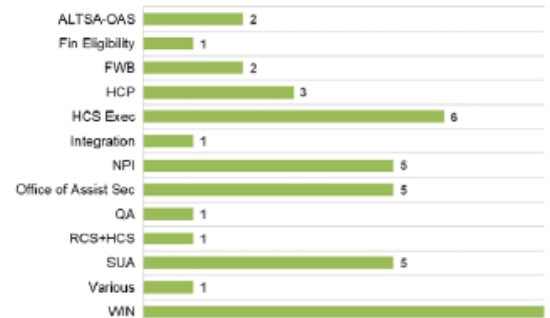
Cross-Divisional



High Risk



Unit Assisting



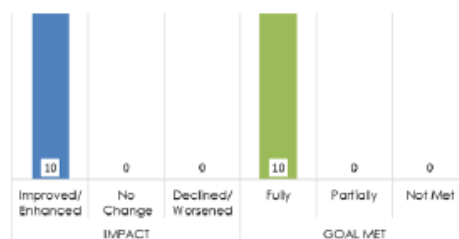
OUTCOMES

“The Ecocycle event Dawn Shuford-Pavlich led was positive and helped us look at our work differently, through a lens of what needs to be renewed or let go, rather than just a constant stream of busy work. I think for any team that may be struggling to set priorities, this helps add another lens so the right things can rise to the top.”

— Andrea Meewes Sanchez, AAA Unit Manager (at time of project)

OIS Project Outcomes 9/2019-9/2020

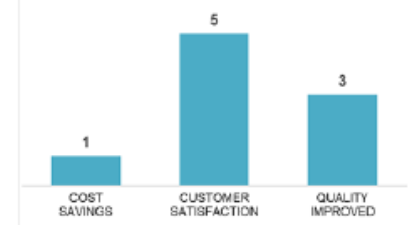
Projects Completed = 10



DSHS Lean Tracker (select all that apply)

9/2019-9/2020

Projects Completed = 10



PDCA



| | | | Form | | | |
|----|-------|-----------------|------|-----|---------------------------|-----------------|
| | Added | Tab | Entr | Ne | Data Field Name | Data Field Ty |
| 1 | | | Ord | | | |
| 2 | x | 1. Intake | 1 | No | Title | Single Line tex |
| 3 | x | 1. Intake | 2 | No | Requester | Name |
| 4 | x | 1. Intake | 3 | No | Problem Owner | Name |
| 5 | x | 1. Intake | 4 | No | Request Type | Dropdown |
| 6 | x | 1. Intake | 5 | No | Unit Assisting | Dropdown |
| 7 | x | 1. Intake | 6 | No | Interview Date | Date |
| 8 | x | 1. Intake | 7 | No | SIM Interviewer | Dropdown |
| 9 | x | 1. Intake | 8 | No | Submitted Date | Date |
| 10 | x | 2. Summary | 9 | No | Area Impacted | Dropdown |
| 11 | x | 2. Summary | 10 | Yes | Involves Field? | Yes/No |
| 12 | x | 2. Summary | 11 | Yes | Involves AAAs? | Yes/No |
| 13 | x | 2. Summary | 12 | Yes | Urgency | Dropdown |
| 14 | x | 2. Summary | 13 | Yes | Team Members | Multi-line text |
| 15 | x | 2. Summary | 14 | Yes | Stakeholders | Multi-line text |
| 16 | x | 2. Summary | 15 | Yes | Deliverable(s) | Multi-select |
| 17 | x | 2. Summary | 16 | Yes | Role(s) | Multi-select |
| 18 | x | 2. Summary | 17 | Yes | Vision Statement | Multi-line text |
| 19 | x | 2. Summary | 18 | Yes | Mission Alignment | Radio button |
| 20 | x | 2. Summary | 19 | No | Request Summary | Multi-line text |
| 21 | x | 3. Charter | 20 | Yes | Charter Status | Dropdown |
| 22 | x | 3. Charter | 21 | Yes | In Scope | Multi-line text |
| 23 | x | 3. Charter | 22 | Yes | Out of Scope | Multi-line text |
| 24 | x | 3. Charter | 23 | Yes | Decision Maker(s) | Names |
| 25 | x | 3. Charter | 24 | Yes | Root Cause | Dropdown |
| 26 | x | 3. Charter | 26 | No | High Risk? | Yes/No |
| 27 | x | 3. Charter | 25 | Yes | Barriers | Multi-select |
| 28 | x | 3. Charter | 27 | Yes | Data Available? | Yes/No |
| 29 | x | 3. Charter | 28 | No | Cross-Divisional? | Yes/No |
| 30 | x | 3. Charter | 29 | Yes | If yes to above, explain | Multi-line text |
| 31 | x | 4. Duration | 30 | Yes | Start Date | Date |
| 32 | x | 4. Duration | 31 | Yes | Due Date | Date |
| 33 | x | 4. Duration | 32 | No | Est. Duration in Weeks | calculated |
| 34 | x | 4. Duration | 33 | No | Est. hours/week | Number |
| 35 | x | 4. Duration | 34 | No | Routine? | Yes/No box |
| 36 | x | 4. Duration | 35 | No | If yes, what frequency? | Dropdown |
| 37 | x | 4. Duration | 36 | No | Other Notes | Multi-line text |
| 38 | x | 5. Office Chief | 37 | No | OC Decision | Dropdown |
| 39 | x | 5. Office Chief | 38 | No | OC Decision Date | Date |
| 40 | x | 5. Office Chief | 39 | Yes | OC action duration (days) | calculated |
| 41 | x | 5. Office Chief | 40 | No | Priority-Impact | Dropdown |
| 42 | x | 5. Office Chief | 41 | No | Size-Effort | Dropdown |

INTAKE

Title *

Requester *

Problem Owner

Request Type

Unit Assisting

Interview Date

SIM Interviewer *

Date Submitted *

SUMMARY

Urgency *

Area Impacted

Involves Field?

Involves AAAs?

Team Members



Next Steps

- Continue to Modify Views
- PowerBI
- Review Priority/Impact and Size/Effort criteria



Parting Thoughts

- Report-driven
- Ideologic alignment
- Start small



Questions
