# De-Siloing Your Data

Use this presentation in conjunction with the De-Siloing Planning Worksheet

Use following questions to refine your understanding of the issue:

- Why do you want data 'together'? How does that fit into your theory of change and/or operational plans?
- What types of data, where is it, and what do you want to do with it once it's in one place?
- Be clear about differences by Program and/or type of data, if there are any!
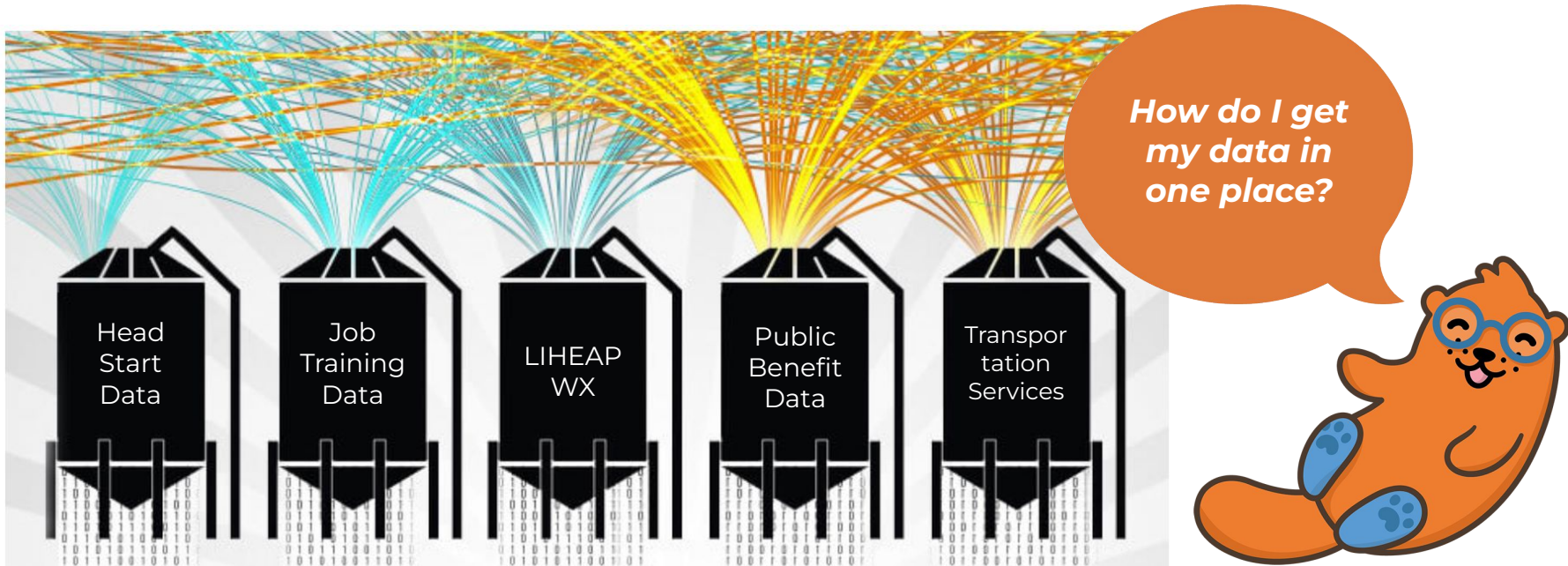
Write a goal/purpose statement:

- Write out why you want data in 'one place' and how that fits into
  - **Theory of change**
  - **Operational/program work and goals**
- You may need to refine this as you move through other questions
- Review this purpose statement with your broader data governance and service integration or whole family teams

Example of preliminary purpose statement that ties to theory of change:

We believe vulnerable families with young children will make more progress toward their goals if they have a single coordinating staff person at our agency and a coordinated approach across agencies in the community.

We think the time, effort, disillusionment that is caused by having to retell stories and needs wastes client's valuable time and energy that is then not spent on making progress.

We want the single coordinator to be able to see information about all members of a family relatively easily to help with coordination.

We want to be able to report /monitor on overall progress of families.

➔ List each Software System that contains client data critical to your goal.

➔ For each of these systems, you're going to record more information on your planning worksheet.

The usage of data informs requirements for de-siloing, otherwise known as ***interoperability***.

Use the following table to help understand different ways of using information…

Level 1: Reporting and Analysis Need ($)

I need to de-duplicate my data and understand who I serve (demographics), what I did, and what result was.

I need to produce a CSBG annual report.

I need to look across multiple organizations and see who was served, when, and how, but I don't need that in real time.

I need to look across multiple organizations and see who was served with what, but I don't need to interact with or change data entered into other software systems (I only need to see that information).

Level 2: Presumptive Eligibility and Referral Need ($$)

I need to get basic information and run presumptive eligibility for internal and external programs. I need to interact with basic information about clients. But I don't need to record or even look at services provided and recorded in other systems.

I need to appropriately refer clients.

Level 3: Collaborative Work Need ($$$$)

I work intensely with the same clients with other organizations or other departments and need to see in real time (or very close) what has been done by others with my customers so that we can better coordinate "care" and plans.

****I need to change/edit or add (not just view) information entered about a client in different client tracking systems**** (note if this is truly a requirement, it will be very expensive!)

What Data?

On a Flip Chart:
- Make a list of the kinds of data you want to "get into one place"
- For each "kind of data," indicate where that information is currently; where is the "source of truth" (note: it may be that it varies by both type of data and program)

Example (the fewer the better):
- Demographic data (define)
- Income (household total only?)
- Address
- Service/Program (intervention)
- Outcome and/or self sufficiency matrices
- Client goals/plans

Example of refinements/additions to purpose

Not shown here is Table 1 on answer sheet

I want to be able to analyze demographic data against service and outcome data regardless of what program or where it was entered.

I want my family support workers to be able to see information about parent's work force training enrollment in 'real time'.
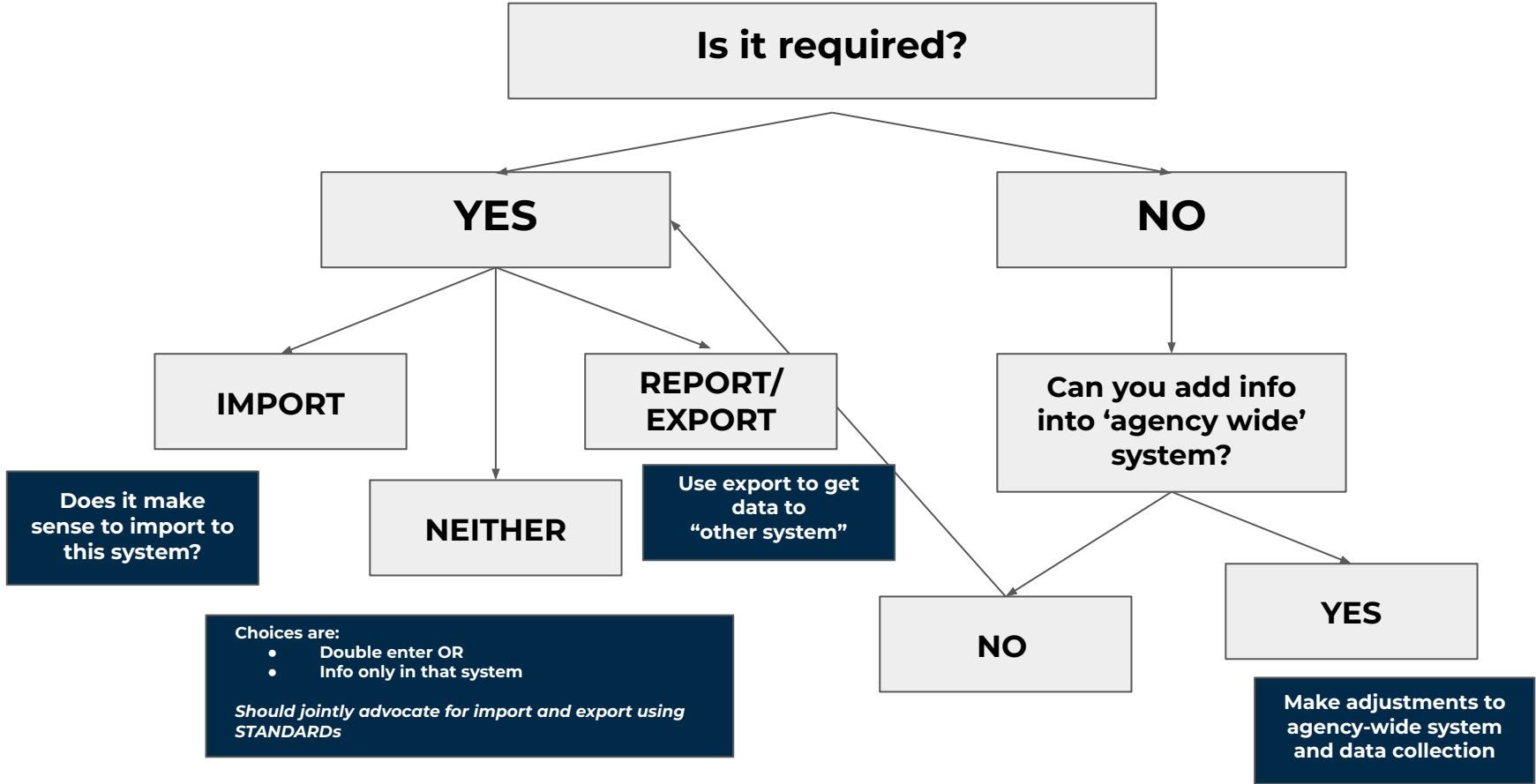
I want to be able to produce a Family "Report" that shows all the child and adult services about once a month to share at a joint staff coordination session.

SO, NOW WHAT?

Table 1 Example

System/Software Name	What info in this system is critical to your goal?	Use	Prioritization
Head Start Software XYZ	• Enrolled child, parents, basic demographics and income • Enrolled Head Start • Attendance rates	Coordinating staff view Use for analysis	high
Housing, CSBG/Emergency programs Software ABC	• HH members demographics • Income • Referrals • Workforce programs • Housing programs • Assessments • Outcomes	Coordinating staff view Report and monitor progress Use for analysis Referral support and view	critical
LiHEAP State Software XYZ			low

For each software that is not your preferred agency wide system or data store answer the following:

Is it required?

YES | **NO**

IMPORT

REPORT/ EXPORT

NEITHER

Does it make sense to import to this system?

Use export to get data to "other system"

Choices are:
- Double enter OR
- Info only in that system

Should jointly advocate for import and export using STANDARDs

Can you add info into 'agency wide' system?

NO

YES

Make adjustments to agency-wide system and data collection

NOW, given goals and information gathered about systems, what is your preferred/possible workflow for client data as it is collected and recorded?

Think of this as a version of the client journey mapping, but focused on data elements.

Add what you found out about each critical software to your worksheet!