

## **Data & Evaluation Subcommittee Onboarding Packet**

Home Visiting Advisory Committee

February 2023

Please find a few materials to welcome you to the Data & Evaluation Subcommittee's work. Please find the full [HVAC Recommendations](#) and note the Data Enhancement specific work is detailed in pages 22-26.

1. Purpose, Principles, Functions and Structure – our subcommittee agreement on purpose and how we will approach this work together;
2. Home Visiting Data System (HVDS) Progress Brief – a high-level look at the history of the data management for the HVSA and the most recent recommendations.
3. HVDS Solutions Analysis – the executive summary produced by BlueSky Consulting NW, for work they did with DOH and the HVSA in 2022;
4. HVDS Business Analysis - the executive summary produced by Berry Dunn & Associates, for work they did with DOH and the HVSA in 2020;

### Subcommittee Co-Leads:

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## Data & Evaluation Subcommittee Home Visiting Advisory Committee

### Purpose

To support the role of the Home Visiting Advisory Committee in meeting the program, policy and advocacy needs of the HVSA, the Data & Evaluation Subcommittee will:

- Identify and prioritize key policy and program questions to address by the HVSA;
- Support equitable data collection and reporting across all models and programs; and
- Promote the use of data in decision-making and advocacy for home visiting.

### Guiding Principles

- We strive for **safe, culturally responsive practices** that respect the cultures, heritages, languages, beliefs, and circumstances of all communities, local home visiting agencies, home visiting staff and the families they serve.
- We honor the **value of the data** we have and **respect the work** undertaken by all parties to collect, report, and manage the data.
- We strive for data that is **inclusive and complete** across all models and programs. We appreciate that **programs value and use data differently** to support their work.
- We are intentional about **using local, state and national data**, both quantitative and qualitative, to examine program and policy questions and to tell the home visiting story without over-burdening the data collection systems.
- We **value the voices** across this group, representing a wide breadth of experience, perspectives, priorities and resources.
- We engage in **transparent communication** practices that are timely, inclusive and accessible.

## Functions

- Recommend information needs (quantitative, qualitative and contextual) to tell the home visiting story in Washington.
- Serve as a communication link for families, communities, programs and models to provide feedback on data requirements and use, particularly with respect to community values and perceptions.
- Prioritize program and policy questions that the HVSA should pursue with analytic resources.
- Provide critical thinking and context to improve understanding of analytic findings.
- Review and advise on the application of Needs Assessment findings and other data and information to expansion planning.
- Support sustainable data system planning.

## Structure

### **Subcommittee Chair and co-Chair**

- A. Facilitate Subcommittee Meeting Discussions
- B. Develop meeting agendas
- C. Report on subcommittee recommendations and activities at quarterly HVAC meetings

### **Subcommittee Members**

- A. Recommend new subcommittee members and assist in recruitment
- B. Regularly attend subcommittee break-out meetings during HVAC and other agreed times
- C. Review materials and reflect on agenda topics in preparation for meetings

## *Background*

The Home Visiting Services Account (HVSA) implements a Portfolio Approach to home visiting services, supporting local decision-making to choose home visiting models that meet the needs of the community. Since 2010, the HVSA has grown from funding four contractors serving 120 children to funding 44 contractors, implementing nine home visiting models that serve over 2,800 families. The HVSA data system needs to meet a variety of functions from enrolling and serving families to reporting out information to inform practice and evaluate programs. As the HVSA continues expansion to more families, it is imperative to invest in data system solutions that support the home visiting work of the local implementing agencies (LIAs) while improving data for monitoring, reporting and evaluation work.

## *Progress Report*

**2010 – 2015:** MS Access databases designed and supported by Washington State University.

**2015 – current:** Data management moved to DOH, with majority of data transitioned to a SQL database. Ongoing work by DOH includes maintenance of SQL and non-SQL databases.

**Oct 2019 – Feb 2020:** BerryDunn and Associates documented the current HVSA business functions and data systems, helped define the desired future environment, identified strengths in the current environment and gaps between the current and desired future environment. Recommendations offered concrete next steps for improving the existing system; considerations for data governance and leveraging the HVSA role locally and nationally to influence data standards and requirements; and future work to research potential alternative data system solutions.

**Mar 2020 – Dec 2021:** DOH moved forward on a few BerryDunn recommendations, most notably continued documentation of the SQL and non-SQL data environment; integration of four more models into the SQL environment; and contracting for the market and solution analyses.

**Jan 2022 – Jun 2022:** BlueSky Consulting NW completed several tasks to support key decision-making for the HVSA, including defining key system functions desired (Figure 1); identification of key principles for a future state; a market analysis of state and vendor solutions available; and a solutions analysis taking into account technical considerations, implications for stakeholders, benefits, and challenges. Highlights of this work include:

- Key principles essential for the desired future state: 1) Data Consolidation; 2) Data Granularity; 3) Data Timeliness; and 4) Data Transfer Automation. Data Consolidation is the top priority and should be an early milestone of any future project.
- Current challenges include labor-intensive data integration processes, sub-optimal data collection systems used by some sites, sub-optimal timing for data sharing, which all contribute to lower quality data and reporting, and labor-intensive reporting functions.
- A hybrid system solution, which supports LIA choice to use their data collection system or a state-sponsored data collection system, is recommended by BlueSky as the optimal solution for data collection. A hybrid solution addresses key issues with a high degree of flexibility. It supports the work and system needs of the LIAs and provides a new opportunity for those LIAs unsatisfied with their current system. (see Figure 2)
- To meet reporting and analytic needs, BlueSky recommends building a business case for a cloud-based data integration and reporting platform that aligns with OCIO and HHS Coalition long term strategies, such as DOH CEDAR.

Figure 1. Primary Functions for the HVSA Data System

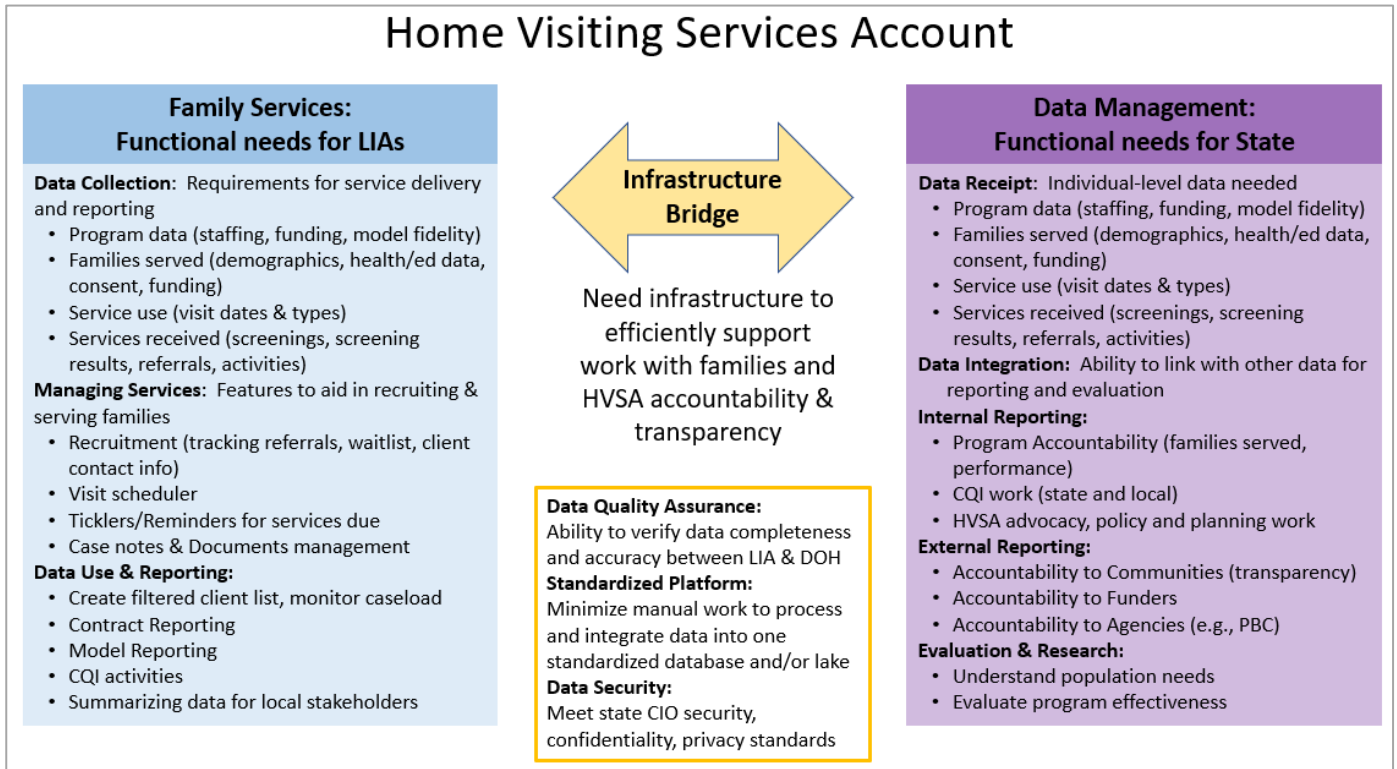
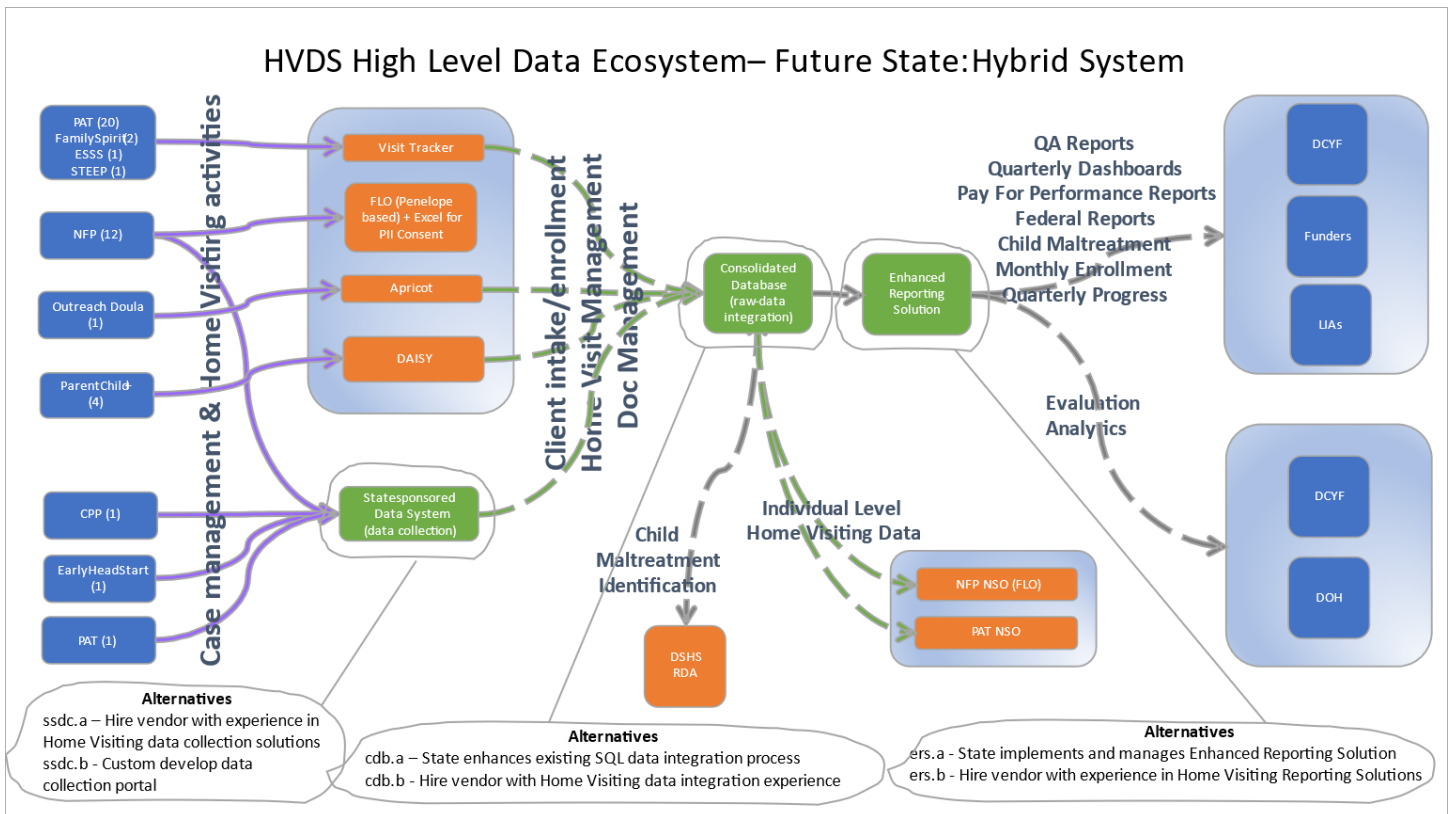


Figure 2. Proposed Hybrid data ecosystem



**Washington State Department of Health  
Home Visiting Data System**

Solutions Analysis Executive Summary

Prepared for



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## Executive Summary

The Home Visiting Services Account (HVSA), led by the Washington Department of Children, Youth and Families (DCYF), needs a more efficient data collection, consolidation, and reporting system to support the work of the local implementing agencies (LIAs) and the reporting, monitoring, and evaluation needs of the HVSA. This analysis was initiated by the Department of Health (DOH) on behalf of the HVSA, to understand options to improve the current home visiting data system (HVDS) ecosystem. The goal of the analysis was to define future options based on current state of the ecosystem, input from stakeholders, and research of the HVDS marketplace, at both a state and vendor level. This Solution Analysis report outlines potential solutions, implementation alternatives to said solutions and proposes an approach to the potential implementation of the future HVDS ecosystem. This document is a follow-on from previous deliverables, the Primary System Functions, and the Market Analysis report.

In 2020, BerryDunn and Associates documented the current HVSA business functions and data systems, helped define the desired future environment, identified strengths in the current environment and gaps between the current and desired future environment, and made recommendations accordingly<sup>1</sup>. As detailed in their report, the HVSA funds several different home visiting program models. While this approach allows the HVSA and LIAs to better meet the needs of diverse communities and populations, it also complicates data collection and reporting processes, particularly given the technological constraints in the current environment. Home visiting programs are often funded by—and must report to—a variety of funders, both public and private, who frequently have differing performance measures and reporting requirements. Model diversity creates challenges for comparability of data and measures across program models. BerryDunn’s analysis tells the story of a current HVSA data collection and reporting environment that is suboptimal, with processes that are cumbersome and time- and resource-intensive and that yield data and reports that do not effectively meet all stakeholder needs. Their Business Analysis and key findings were used as input to understand the current HVDS ecosystem as well as its challenges.

Three potential HVDS ecosystem solutions were analyzed, all with the goal to achieve the desired future HVDS ecosystem and its key principles as presented in section 4 of “Deliverable 3 - Market Analysis”.

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<sup>1</sup> Business Analysis, BerryDunn and Associates (February 2020).

The three potential solutions are:

**Federated System** - Federated Data Collection with Consolidated Database and enhanced Reporting Solution. The Federated System builds on the existing federated data system environment where LIAs continue to use their data systems. Raw data from all LIAs data systems is then integrated into a single consolidated HVSA database which provides the data for an enhanced reporting solution that fulfills the HVSA and LIA reporting and evaluation needs.

**Universal System** - Universal Data Collection and enhanced Reporting Solution. The Universal System consists of a universal data collection system used by all HVSA-funded LIAs plus an enhanced reporting solution that fulfills the HVSA and LIA reporting and evaluation needs.

**Hybrid System** - Hybrid Data Collection with Consolidated Database and enhanced Reporting Solution. The Hybrid System is a hybrid of the **Federated System** and the **Universal System**, it builds on the existing federated data system environment where some LIAs continue to use their data system to meet their data collection needs and their raw data is integrated into the single consolidated HVSA database, while the rest of the LIAs use the State-sponsored data system to meet their data collection needs with their raw data integrated into the single consolidated HVSA database. This single database provides the data for an enhanced reporting solution that fulfills the HVSA and LIA reporting and evaluation needs.

It is possible that not everything will be achieved at once, for instance, if the future project were to be implemented in phases, each phase will contain major milestones that will add functionality on the previous phases. The potential solutions involve different challenges for the LIAs, their data system vendors, and the state, such as level of technical difficulty, implementation complexity, organizational change management, contractual negotiations across the board and therefore, different levels of investment to achieve the desired future state.

The modular nature of the work of the HVSA, as identified in “Deliverable 2 - HVDS Primary system functions”, the high-level analysis of current HVDS ecosystem as well as the potential solutions identified three main modular functions which would be required to close the gap between the current state and the desired future state of the HVDS ecosystem.

The modular functions are:

**Consolidated database:** Contains the minimum data sets from all LIAs Home Visiting (HV) data systems to fulfill state, federal and funders reporting, monitoring, and evaluation requirements.



**Enhanced Reporting Solution:** Contains user friendly reports and dashboards to fulfill state, federal, and funders reporting requirements. It also allows for the data to be used for evaluation and analytics.

**State-sponsored Data System:** Is a Home Visiting data collection system intended to be an alternative to address LIAs data collection and reporting needs and/or data integration needs for the state. Depending on the option chosen, it may be used by some LIAs (**Hybrid System** option) or by all LIAs (**Universal System** option).

It is important to note that, even though there are a few challenges to overcome, data consolidation is a goal the HVDS should pursue, along with timeliness, accuracy, and automation. Enhanced data integration is the means to achieve the necessary data consolidation and needs to be an early milestone of any future project.

The vendor solutions (Software as a Service aka SAAS solutions) assessed all have strengths and weaknesses, although two clear differences separate one of the vendors; the degree of configurability of the solution, and a mature implementation process to ensure the business needs are met.

The current state data team was also assessed and if the team is enhanced in size and functional roles it is a good choice to tackle some, if not all, of the work required to implement the future HVDS ecosystem. The current team is smaller than the other states teams interviewed.

This table presents a high-level summary of the Solutions Analysis, all vendor solutions are SAAS solutions:

Modular Function	State Data Team	DAISEY	Apricot 360	Visit Tracker	Penelope	QUALO
Consolidated Database	Best	Fair	Better	Fair		
Enhanced Reporting Solution	Best	Fair	Better	Fair	Fair	Fair
State-sponsored Data System			Best	Better	Fair	Fair

Potential solutions are likely to get traction in the current state IT environment, following one of the two solid paths below:

- The chosen solution is implemented leveraging the DOH’s Cloud Environment for Data Analysis and Reporting (CEDAR). CEDAR checks several boxes in terms of DOH, Washington’s Office of the Chief Information Officer (OCIO) and Health and Human Services (HHS) Enterprise Coalition long term strategies.

- The chosen solution is implemented using an experienced Home Visiting Software as a Service (SAAS) vendor, as SAAS solutions also check several boxes in terms of OCIO and HHS Coalition long term strategies.

## BlueSky's Key Recommendations


BlueSky believes the future HVDS ecosystem is reachable and section 5 – Solutions Analysis outlines potential solutions to achieve it. It's important to note that the LIAs' needs along with the critical services they provide are at the core of our recommendations.

The key recommendations are:

- **Recommended Solution:** The **Hybrid System** addresses key issues with a high degree of flexibility. It supports the work and system needs of the LIAs and provides a new opportunity for those LIAs unsatisfied with their current system.
- **Top Priority: Data consolidation.** It is important to note that, even though there are a few challenges to overcome, data consolidation (along with its timeliness, accuracy, and automation) needs to be an early milestone of any future project.
- **Where to host solution:** Build business case for data integration & enhanced reporting solution to be hosted in **CEDAR**. It is a robust cloud-based data integration and reporting platform that aligns with OCIO and HHS Coalition long term strategies
- **Project Approach:** BlueSky's recommendation is to use a **phased project** approach, which aligns with OCIO's preferred Project methodology and gated funding model.

## Additional considerations

Completing the implementation of the future HVDS ecosystem solution and making LIAs, the state and NSOs and funders ready for the new processes and workflows will be a significant undertaking. To best position the HVSA to undertake this work, BlueSky highlights a few additional considerations. First, commissioning an agency readiness assessment is recommended to understand the organizational effects of moving through the various project phases and activities depending on the chosen solution. This will provide key information for decision-makers on agency-readiness to move forward. Second, securing investments and commitment to prioritize the solution's implementation will be critical to adopting any solution. Lastly, an Organization Change Management (OCM) plan is recommended to ensure key goals are achieved.



**Washington State Department of Health**  
**Home Visiting Services Account**  
Long-Term Data System Project

**Business Analysis: Executive Summary**



May 2020

## Executive Summary

### Background

The Home Visiting Services Account (HVSA), established by the Washington Legislature in 2010, charges the Washington State (State) Department of Children, Youth, and Families (DCYF) and Thrive Washington<sup>1</sup> to build and manage home visiting programs in the state of Washington. Since 2010, the program has grown from funding four grantees (i.e., Local Implementing Agencies, or LIAs) serving 120 children to funding 36 grantees serving approximately 2,400 families across the state in State Fiscal Year (SFY) 2019<sup>2</sup>.

The HVSA's current data system adequately (although not ideally) meets the HVSA's existing reporting needs; however, limitations prevent it from meeting current and future expansion work. Therefore, the HVSA desires a sustainable, long-term Home Visiting Data System (HVDS) solution that will effectively and efficiently support the priorities of the HVSA and its key stakeholders. As a result, the Department of Health (DOH)—with whom DCYF contracts to provide data management, analytics, and evaluation services for the HVSA—engaged BerryDunn to perform a business analysis of the HVSA business functions and data systems to help inform its decision making related to a future HVDS.

To help ensure that the voices of HVSA stakeholders were reflected in the business analysis, BerryDunn facilitated key informant interviews and stakeholder workshops with a range of HVSA stakeholders between November 2019 and January 2020. In addition, BerryDunn performed independent background research and a review of relevant project documents provided by DOH. With this information, BerryDunn documented the current HVSA business functions and data systems, helped define the desired future environment, identified strengths in the current environment and gaps between the current and desired future environment, and made recommendations accordingly.

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<sup>1</sup> In February 2020, Thrive Washington closed and its home visiting team was absorbed by the Ounce of Prevention Fund to form Ounce Washington (Ounce). [www.theounce.org/WA](http://www.theounce.org/WA)

<sup>2</sup> Sources: Report: Expanding Home Visiting Services in Washington, DCYF, March 8, 2019 and <https://www.dcyf.wa.gov/services/child-dev-support-providers/home-visiting/hvsa>

## Findings

As a result of the analysis, BerryDunn identified 36 gaps between the HVSA’s current data collection and reporting environment and its desired future environment across six categories, as summarized in Table ES.1.

**Table ES.1: Summary of Gaps**

Category	Number of Gaps
Data Integrity and Comparability	4
Inefficiencies	9
LIA System-Specific Functionality	9
Reporting and Analytics	8
Staff, Training, and Communications	2
Timeliness	4
<b>Total</b>	<b>36</b>

Additional general challenges in the current environment include:

- The HVSA funds several different home visiting program models. While this approach allows the HVSA and LIAs to better meet the needs of diverse communities and populations, it also complicates data collection and reporting processes, particularly given the technological constraints in the current environment.
- Home visiting programs are often funded by—and must report to—a variety of funders, both public and private, who frequently have differing performance measures and reporting requirements.
- Model diversity creates challenges for comparability of data and measures across program models.
- Some LIAs do not use the existing data systems to support the provision of services, making the data entry task of little value to the home visiting staff. In addition, because home visiting staff have concerns that using electronic devices such as tablets during a home visit may interfere with client relationship building, many LIAs still work with paper charts.
- Funding for HVSA infrastructure has not kept pace with funding that supports expansion to new program models, LIAs, and service delivery to families. This discrepancy places significant strain on existing State staff and limits the State’s ability to scale other required resources (e.g., IT systems) accordingly to meet program needs.
- Technical and data management knowledge and skills of staff across the LIAs are variable, and the capacity to address changes to data requirements and/or systems is similarly variable.

The information gathered and reviewed in this analysis tells the story of a current HVSA data collection and reporting environment that is suboptimal, with processes that are cumbersome and time- and resource-intensive and that yield data and reports that do not effectively meet all stakeholder needs. However, the story that is told is also one of a group of diverse entities and individuals that have come together across the HVSA and LIAs to create the best system possible to support home visiting services data collection and reporting—and more importantly, to support Washington’s most vulnerable children and families. These organizations and individuals have invested significant time and energy into overcoming the challenges in the current environment regardless of the constraints and barriers that exist, and they have developed strong relationships, a spirit of collaboration, and mutual trust and respect along the way. This—along with key stakeholders’ shared vision for the future and profound commitment to serving others—may serve as the HVSA’s largest strength and opportunity as it moves forward with improving its data collection and reporting environment.

### Recommendations

Due to the multifactorial causes of the gaps and challenges presented in Section 5.2 and 5.3 of this analysis (e.g., the diversity of the LIAs and the program models they employ, the complexity of certain aspects of the home visiting services environment in Washington, such as governance and funding models), the State may be challenged to find a single, straightforward new HVDS solution to help the HVSA achieve its desired vision for the future environment.

Therefore, BerryDunn recommends that the HVSA take several near-term<sup>3</sup> steps—as summarized<sup>4</sup> in table ES.2—that will serve to: 1) continue to inform the decision-making process regarding whether or not to pursue a new HVDS, 2) establish a more solid foundation upon which to pursue a new HVDS—if that is the decision the State makes, 3) more expeditiously begin to address some of the challenges currently faced, and 4) move the HVSA forward along the path to creating the improved future environment that stakeholders seek even if the State decides not to pursue a new HVDS.

**Table ES.2: Near-Term Recommendations**

Recommendation #	High-Level Description	Gaps Addressed
1	Accelerate the timeline for onboarding other LIA systems into DOH’s SQL database.	Data Integrity and Comparability; Inefficiencies; Timeliness, Reporting and Analytics; Staff, Training, and Communication
2	Enhance existing HVSA technical assistance and tools to support all LIAs.	Data Integrity and Comparability; Inefficiencies; Staff, Training, and Communications

<sup>3</sup> Relative to the timeframe required to develop and implement a new HVDS in the long-term.

<sup>4</sup> In no priority order.

Recommendation #	High-Level Description	Gaps Addressed
3	Raise LIAs' concerns with NSOs and advocate on LIAs' behalf.	LIA System-Specific Functionality
4	Build upon current HVSA efforts to demonstrate and enhance the value of collecting and providing data to the LIAs.	Reporting and Analytics; Staff, Training, and Communications
5	Leverage the HVSA's position and role in the Washington home visiting services community to facilitate and convene funders.	Data Integrity and Comparability; Inefficiencies; Reporting and Analytics
6	Continue participation in the Health Resources and Services Administration's (HRSA) national standards effort.	Data Integrity and Comparability; Reporting and Analytics
7	Form new and/or enhance existing data governance initiatives.	Data Integrity and Comparability; Reporting and Analytics
8	Explore additional available technical resources in the State ecosystem.	Data Integrity and Comparability; Inefficiencies; Reporting and Analytics; Timeliness
9	Perform research on how other states have tackled similar challenges.	Data Integrity and Comparability; Inefficiencies; Reporting and Analytics; Timeliness
10	Issue a Request for Information (RFI) to solicit potential system vendors' perspectives on solutions to fulfill the HVSA's long-term data collection and reporting needs.	Data Integrity and Comparability; Inefficiencies; Reporting and Analytics; Timeliness
11	Perform an IT feasibility study, inclusive of an alternatives analysis and cost/benefit analysis.	Data Integrity and Comparability; Inefficiencies; Reporting and Analytics; Timeliness
12	Document additional processes and/or validate existing process maps, and develop business/functional and technical requirements for the HVDS.	All

As a result of implementing all or some of the near-term recommendations, the HVSA will be able to better define the alternatives for the long-term HVDS, and gain clarity regarding the alternative that may best fulfill its needs.

Any system updated or newly designed by the HVSA, however, should consider the following critical success factors, developed based on information provided by HVSA stakeholders and other sources:

- Business Analytics
- Data Timeliness
- Data Integrity and Availability
- Data Quality
- Extensibility and Flexibility
- Integration
- Mobility
- Standardization
- Web-Based Services
- Reliability

### Decision and Next Steps

Immediate next steps for the State include determining which—if any—near-term recommendations (as described in Section 5.5.1) it would like to proceed with, and the priority and timeline for implementation of those recommendations<sup>5</sup>.

Ultimately, key decision point for the State is whether or not it should proceed with designing, developing, and implementing a new HVDS, or if it is more feasible and beneficial for it to pursue an alternative path to achieve its long-term vision for the home visiting services data environment. Although the State may elect to move forward with all or some of the near-term recommendations provided in Section 5.5.1 regardless of its decision, at some point the State will reach a point where it must decide on the path forward for the long-term HVDS and determine additional required actions accordingly.

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<sup>5</sup> The State may want to consider development of a high-level IT roadmap inclusive of its planned efforts/activities, and the associated owners and timelines for each effort/activity, related to decision making and potential implementation of a new HVDS. This may include, but not be limited to, the near-term recommendations the State will implement from Section 5.5.1.