Executive Summary: Inter-County Business Intelligence Partnership

Overview: Contra Costa Employment and Human Services needed more data to better manage programs. Partnering with Santa Clara achieved that goal to our mutual benefit.

In late 2014, Contra Costa County's Employment and Human Services Department (EHSD) determined that it needed more data to effectively manage its programs and began researching business intelligence tools that would provide a high level of visibility into our benefits and other programs. The choices were to build a system in-house or work with another county and capitalize on their efforts. After researching alternatives and making several staff visits to Santa Clara County, EHSD senior managers determined that the Santa Clara Business Intelligence solution was highly developed and provided the full range of data needed. Contra Costa (CC) and Santa Clara's Social Services Agency (SSA) conducted a feasibility study to determine if a project to import Contra Costa's data into SSA's system was possible and cost effective. The project's concept would provide EHSD's managers access to the same data warehouse-based dashboards and drill-down reports currently available to SSA users, only displaying Contra Costa data. SSA would host EHSD with the infrastructure, network, hardware, software (as-is), system maintenance as well as providing training and support. The project would be memorialized in a Memorandum of Understanding (MOU) adopted by the Boards of Supervisors of both Counties. The dashboards would be configured using EHSD data and work processes while incorporating EHSD's terminology and geographical requirements. The data would be delivered through a dedicated high-speed network to handle daily and weekly data and user traffic for approximately 300 users.

The implementation would be in phases. The first phase consisted of four major deliverables: an approved feasibility study; an agreement on system requirements and network architecture; approval by the respective agencies and Boards of Supervisors of the MOU; and an approved Advanced Planning Document (APD) that allowed the counties to proceed with staffing and purchases. The additional phases would include implementing the data load processes and dashboards in the following sequence: First, CalWIN (CIS), then CMIPS II, and finally CWS/CMS. The CWS/CMS portion was contingent upon getting the data from the state.

After the basics were agreed to, the counties discussed future enhancements to include providing Contra Costa access to query the database, modifying existing dashboards to reflect policy changes, and developing new dashboards such as IHSS recipient demographics similar to IHSS provider demographics.

The major benefits of this project include quickly delivering a standardized data warehouse, a reliable delivery system of dashboards, and the ability to deliver data in a relatively short amount of time. These components are a key aspect of EHSD's strategic plan to become a more data-informed agency. Mitigation strategies were identified for all risks outlined in the Feasibility Study, resulting in the benefits far outweighing the risks.

As this project moved forward, the significant benefits to EHSD became clear. The leadership and managers of EHSD have a premier business intelligence process, delivered in a short amount of time, providing data on our benefits and other programs, provide the ability to assess data at the macro level as well as drill down to the case level. The data is timely, consistent, accurate, and easily understood.

The level of cooperation between SSA and EHSD is a model for others. Weekly meetings were set up and the schedule, with targets, testing regimens, actions plans and timely sharing of information was scrupulously followed. Both counties benefited through sharing costs for hardware and staffing. Some data enhancements at SSA were realized as the project unfolded. Santa Clara spent in excess of two million dollars in the development of its business intelligence system and the process took several years to reach maturity. Through this cooperative arrangement, Contra Costa was able to achieve the same result in a shorter time for significantly less money,

while sharing costs with SSA. As pointed out by the Contra Costa County Board of Supervisors in approving the Intercounty agreement, "The cooperation between SSA and EHSD will significantly shorten the time and cost that would be incurred if EHSD attempted to set up its own business intelligence solution. This is an excellent example of inter-county cooperation."

The results have surpassed expectations and the benefits have been realized by both counties. For example:

- We have a tool that pulls data from multiple sources into a consistent framework.
- We have a tool that indicates business trends. An example is the monthly trend graph below. This type of information helps our counties predict staffing needs, properly size systems, and ensure ancillary services, such as print and mail, are adequately budgeted.
- Contra Costa budgeted $575,000 and it saved Contra Costa six person-years of development time and over $800,000. By sharing costs with Santa Clara, Santa Clara saved over $200,000 the first year.
- We have a tool that shows customer concentrations by need. This helps determine where offices should be placed to minimize customer and staff travel.
- We can aggregate customer information to obtain a holistic view of the customer, thereby enhancing our ability to support them.
- A consistent format for presenting data minimizes training for staff and enhances comprehension of the data. It also creates a central point for accessing and sharing analytical data.
- The data helps create a business-driven priority list. We can review the metrics and information that have the highest impact on our business objectives and use that information to define which groups and processes can deliver that impact.
- Dashboards, alerts, and notifications linked to standardized metrics allow business leaders throughout our Department to manage processes using key performance indicators, and business users are better able to manage cases by reacting to changes in a timely manner.
- "What If" Scenario Analysis with information integrated from multiple sources allows business leaders to analyze long-term strategic decisions and gauge impacts regarding issues such as where new offices should be located, which programs need more resources, which third-party organizations will maximize benefits to our customers, and how State & Federal mandate changes will impact our processes.
- With the ability to create and change their own reports, users increase the speed with which they can address their own analytic needs.

All of the above help deliver improved productivity, better compliance and more effective use of available funding, while enhancing our ability to deliver quality services to our customers. We have a much more complete picture of agency activity and performance, standardized reporting, and near real-time dashboards. According to *Competing on Analytics* by Thomas Davenport, high-performing companies use Analytics as a key strategy element five times more than low performers. The cooperation between Santa Clara and Contra Costa Counties and the availability of data move us closer to the high-performing end of the continuum.

In summary, business intelligence has created a strategic advantage and both Contra Costa and Santa Clara Counties are reaping the benefits.