Section #2 Transcript

Section #2: Understanding the Data-to-Wisdom Continuum

Hello, and welcome to Section #2 of the TenEleven Learning Course, Reports Don't Improve Outcomes. In this section, we will be discussing the Data-to-Wisdom Continuum, which is the process by which meaningless data points from the past, become meaningful actions that will result in better service delivery for current and future clients. It is the foundation for discovering deficiencies in your business process, and systematically improving them.

We will walk through the process of first collecting evidence, all the way to applying process changes that you will know empirically improve your outcomes. That way you will be able to **know** that your actions make a difference, and not just assume they do.

Coming up in this section, we will walk through the four stages of the Continuum: Data, Information, Knowledge, and Wisdom.

Data is collecting individual data fields that by themselves are relatively meaningless and represent the past.

Information is combining those data fields from the past and organizing them in the form of a report.

Knowledge is drawing conclusions from your information, and then taking action within the context of your strategic plan.

Wisdom is being able to predict positive results to the business and taking additional action for continuous improvement.

In this section, we will also discuss how often organizations get stuck at the Information Stage and fall into the Chasm of reporting for reporting's sake, and how you can be an organization

that takes the Continuum all the way to Wisdom, and predictable positive changes for your organization.

Stage #1: Data – Meaningless Fields From the Past

Are you ready to learn about the first stage in the Data-to-Wisdom Continuum – the Data Stage? Data in its purest form, is an individual representation of some item of history. Data alone is virtually meaningless; however, the collection is critical. The old adage "garbage in; garbage out," absolutely applies here.

Let's jump in and take a look at the fundamentals of data collection.

Data represents the notional stage of our Continuum. We think we have ideas about what's going on in our business based on observation. But we want to start testing whether we can empirically prove or disprove those notions. We start by collecting data elements that are derived from our strategic plan. Your organization's strategy and goals that we discussed in Section #1 will help you determine what data to collect to indicate whether you're achieving your annual sub-goals which will contribute to your three to five year strategic goals.

The key to data collection is to make as many "discrete" fields as possible. That means you want to resist the desire to have a whole lot of text to describe what's going on. Free form text fields are virtually impossible to report against. Consider a residential clinic that documents the whereabouts of clients in a free-form text field. Three staff members might document that status differently:

1. Missing
2. Ran Away
3. AWOL

All three mean the individual is unaccounted for, yet if you had three instances of each, your report would not show you nine instances of what you are looking for. Choosing one of these

as your organizational nomenclature, and then converting that one into a dropdown selection will produce a discrete data point.

Besides drop-down menus, other types of discrete data collection methods include:

1. Selection Buttons
2. True/False
3. Date Fields
4. Check Boxes

Essentially, anything that eliminates the free typing of the person inputting the data.

Now that can get pretty strict, but there is a way that you can allow for ambiguity in discrete data. It just needs to be done intentionally. It's known as the "other" option. Adding "other" to your discrete data collection is ok, but you should use it methodically.

You should consider whether or not each field deserves an "other" option at all. If it is warranted, you can choose to simply capture "other" as a discrete field. Or you might want to allow a free text field for other. If you choose the second, you want to do so with the intention of reviewing the free text to determine if there are any commonalities that you can join together to add to your discrete drop-down menu, and then begin to reduce the instances that the "other" field is used.

Finally, only collect what you need. Don't collect information because "maybe we'll need it someday." If you think in terms of your organization's strategic plan, you will be able to collect the data you need to execute on the objectives that matter to you. Make sure you have a technology that is flexible enough to add data collection throughout your planning horizon on a "just in time" basis. That way you can create new data capture to support the evolving goals and objectives of your organization.

All of these principles of data capture are designed to ensure what's known as "Fidelity of Data." Fidelity of Data is the foundation for the rest of the Continuum. It means that your data is

reliable and will inspire you to take bold steps in the future. It will eliminate questioning when the notions you have about your business are dispelled by the reality that your data presents. You can only achieve Fidelity of Data by only collecting what you need and making sure it is measurable by collecting discrete data.

So, that's how data represents the notional stage of the Data-to-Wisdom Continuum. As we continue, you will discover how your notions are either proved or disproved, and what exactly you can do about it.

Stage #2: Information

Welcome to Stage #2 of the Data-to-Wisdom Continuum, Information. Here, we are going to look at the stage of the Continuum where we take the data we discussed in the previous lesson, and organize it in certain ways to create reports.

The Information Stage is where all the previously meaningless individual data points you captured start to say something. A patient who is 25 years old is now a part of the 35% of the organization's clients who are between the ages of 20 and 30 years old.

We begin to stack those data elements together until they tell us what it is we want to know about what makes the organization run. But how do we determine how to stack the data and what reports to run?

Well, remember back to the process flow diagrams we talked about in the strategic planning phase? For a quick refresher, it's a good idea to visually map out your processes so that everyone can have an understanding of how all their daily activities fit into the overall process of the organization.

These diagrams will reveal which reports to run. Each area of your business will have its own separate measures. It's important to always be working on the various areas of your business to avoid creating sub-optimization.

What that [sub-optimization] means, is that if you work diligently at your intake process to increase the number of clients you bring in, but ignore the clinical capacity, your organization won't be able to keep up. When you have specific areas of the organization running faster than others, this is what we mean by sub-optimization. When using reports to improve areas of your business, it's important to be mindful of the impacts to other areas of your organization as well.

Maybe you have a program that uses an evidence based best practice measurement tool for client outcomes. This would be an instance where running reports are good, but looking at them without the intention of taking action is a mistake. Your strategic plan has guided you so well up to this point. It will continue to guide you into what actions you should take once you interpret the information into knowledge during the next lesson.

Now follow us to the next stage in understanding how to ensure you don't get trapped in the dreaded Chasm. Reporting on outcomes is good, but improving on them for the next report is even better. This is where so many organizations stop, and fall victim to the Chasm of reporting for reporting's sake.

The Chasm!

Now that you have been introduced to the first two stages of the Data-to-Wisdom Continuum, we need to study the Chasm of reporting for reporting's sake so we can learn how to avoid it. Put simply, the Chasm is what happens when you don't have a strategic plan. Your strategic plan tells you not only what data to collect, and what reports to run, but it expects that you're going to take action to improve your outcomes to get you over that bridge to the rest of the Continuum.

When you don't have a plan, many organizations will stop here at the Information Stage, and continue to run reports for reporting's sake. This is the trap where you continue to run reports and look at them once and just hope that your measures improve, instead of taking the necessary actions that cause them to improve.

Common reasons that organizations fall into this Chasm include: lack of organizational goals, lack of a strategy, lack of planning. All of these reasons fall into the category of not knowing where you are trying to get to as an organization.

The other common cause is data infidelity. In the Data stage of the Continuum we discussed the importance of repeatable processes to create "Fidelity of Data." When you view your reports and you don't trust them, it is very difficult to take bold action to make improvements. If your processes are repeatable and enforced, then you can trust the data.

For example, if your organization has a strategic planning objective to improve care for those with Post Traumatic Stress Disorder, you may choose a PTSD assessment to give to all of your clients. That way you can watch for improvements of your average assessment scores over time. Your report might show that your client average is improving, but you might suspect that many assessments are being missed.

If you don't have, or if you doubt that you have uniform data, you won't be able to confidently display your numbers to, say, a private grant survey foundation that wants to support your efforts around improving clients with PTSD. Uniform data means that each data point was collected in the same environment. For example, if your clinician forgets to administer the PTSD assessment, or a client misses an appointment and receives installment two of the assessment when everyone else is receiving installment three, you no longer have uniform data across the population.

If you suspect this, what you need to do is run a validation report to see how many clients are missing the assessments in order to check the integrity of the data. If the instances of the assessment are too low, then you need to cycle back to the Data Stage and adjust your processes, before you will be able to take actions and advance to the Knowledge Stage of the Continuum that we will tackle in our next lesson.

Stage #3 – Knowledge

Now that you have learned how to collect data, how to turn that data into information, and how to avoid the dangers of getting trapped in the Chasm, you are ready to take your organization to the next stage. Knowledge.

Knowledge is gained when you start to examine the reports you've run, and then draw conclusions in the context of your overall strategy. It's now time to ask your information the question, "why?" Once you identify trends and patterns in your information, you can ask why those trends and patterns are occurring, and then brainstorm what actions can be taken to change them.

You may need to run additional reports or adjust the reporting parameters to drill down deeper for those insights. For example, you may want to expand the time period you're looking at. Or you may want to sort the information from largest to smallest. It's also possible that your information tells you little more than you need to capture different data and then you can come back and revisit the report again later. If your report doesn't tell you anything at all, you might need to revisit the data you are capturing to paint a more accurate picture.

Knowledge is gleaned from reported information, but it should be analyzed in the context of your strategic plan. When you ask your "why" questions you should be asking them in terms of "how does this information support our strategic objective?" Or "what about this information shows obstacles to achieving our strategic plan?"

Your strategic plan should essentially waterfall in this way:

1. Define your strategic objectives
    a. Define the objectives that will contribute to your overall strategy
        i. Define the tactics that will determine whether you are achieving your strategic objectives

In the next section, we will review a specific behavioral health example that will consider the following waterfall.

1. Strategy = Interact with clients on a consistent basis to improve outcomes
    a. Objective = Reduce organizational no-show rates
        i. Measure reasons for no-shows to take meaningful actions

Now, when you run reports that show deficiencies, you need to reduce the temptation to tackle the low-hanging fruit. Focusing your energy on the items of greatest deficiency will make the largest positive impact on your organization in the shortest period of time.

It's so easy to want to spring into action when you think you can bring a deficiency down to zero. But cutting a large deficiency in half is way more valuable to your agency. Fostering a data-driven culture within your organization will help you celebrate a 50% reduction of an impactful deficiency over a reduction to zero of a less significant deficiency. You'll just need to explain your results, put them in context, and use them as justification for the action you're going to take.

After you take your action, you want to run the report again after a period of time so you can measure the effectiveness of your action, and then begin to determine what to do next.

Taking action on an area of your business, and seeing improvement in the outcome is achieving knowledge. Knowledge is knowing that the area of the business is within your control to improve with thoughtful and strategic action. In the next lesson, we will show you how you can convert your newfound knowledge into wisdom, and make predictable changes to your outcomes.

Stage #4: Wisdom

Welcome to the final stage of the Data-to-Wisdom Continuum. Now that we collected our data, organized that data into information, learned that taking action on that information will improve our outcomes, we are ready to achieve wisdom in one specific area of our business.

Converting our newfound knowledge into wisdom means we are recognizing that change in our applied area is possible, and that we can now use our knowledge to predict how changes to the same objective will result in continuous improvement. After tackling your biggest deficiency first, your organization will be able to say, "since we were able to achieve the desired outcome from our first change, then subsequent strategic actions will also produce improvements toward the same outcome."

By following the Data-to-Wisdom Continuum, you will know empirically, not notionally, that the desired outcome you are trying to reach is achievable. That will give you the confidence to know that your next actions will be worthwhile investments. If you're unable to produce an impact in your largest deficiency, then you have not achieved wisdom. And therefore, you may not want to invest in actions towards additional, smaller deficiencies until you know you can improve on your largest negative return first.

With wisdom achieved, you can continue making changes to your business practice that you know empirically will have positive results. While you may not know what the extent of the return on those changes will be, you do know that the outcome can be improved and that additional investment is justified.

In the next section, we are going to take a look at the application of the Data-to-Wisdom Continuum as it applies specifically to Behavioral Health, while also tracking how a specific organization might use wisdom to improve their no-show rates.