RAMSEY COUNTY
Workforce Solutions

Strategies to improve your agency's performance

Agencies can use periodic reports generated by Ramsey County's CHS Evaluation Unit (Current info, sanction outreach, TANF WPR by counselor, etc.) to identify cases that may have errors in the coding and/or tracking of hours. Reports sent by Workforce Solutions' MIS unit and MFIP administrative team (Data Specialist, PUP, etc.) can also be used to assist counselors in identifying where efforts can be applied. CHS Evaluation may also create reports (ie, Indicators Report) upon request.

Evaluation Unit and WFS MIS reports – how to use them:
Different reports are sent with different purposes. Monthly reports cover a 1-month time period, while quarterly reports cover a 3-month time period. Reports are tagged with an icon (see below) to let the reader know how recent the data source is. Reports can be categorized like this:

Hot reports: Contain recent data sent to help agencies identify outcome indicators, errors in data entry, or cases that need additional attention while there is still time to make changes to the data.

Sanction Outreach List (monthly)
Current Info Report (monthly) including:
- Self-Support Index indicator
- Cash grant

Data Specialist report (monthly)

Cool reports: Contain "cool" data that give agencies some time (less than a month) to make changes. Cool data is more complete and reliable than hot data.

Preliminary Hours List ("Prelim") (monthly)
Persistently Unaccounted for Participants – PUP (twice/year)

Frozen reports: Contain "frozen" data that report on agency and system performance. Frozen report data that can no longer be changed or updated.

Participation Rate by Agency (monthly)
Participation Rates by Counselor (monthly)
Indicators (quarterly or upon request)
Report Card (quarterly) including:
- Employed 20 or more hours per month (#3a)
- Employed 87 or more hours per month (#3b)
- Increase in income or maintaining minimum/full time wage (#4)
- TANF Workforce Participation (#2)
- Off MFIP with wages (#5)
- Self-support index (#1)

Refer to the Power Point presentation *"Employment Services Report Card and Tools: Part 2 for Counselors"* for guidance on how to best interpret reports, investigate caseload and client events, and correct data inaccuracies. Find it on the ES provider webpage at http://www.co.ramsey.mn.us/workforce/Provider_Reports.htm. Scroll down the page to "Provider Performance Tools" to find the link. Use the presentation by locating the report of reference, and follow the instructions to determine the meaning of a highlighted field and rectify the error. Instructions are included in the slides.

ES Agency managers and data specialists took part in meetings to discuss how they use reports. The consensus is that all reports include different data, exist for different reasons, and most are used as a key tool for case management, supervision, and performance improvement. General comments about report usage include:

1. Most agencies customize or "repackage" the Current Info and Preliminary Hours list for distribution and use by their staff. Some do the same with the Data Specialist report. They highlight information and include directions about needed action for each highlight in a legend. MIS and Evaluation staff expects that data specialists will alter reports to help counselors target their efforts and to make reports more easily used.
2. Data specialists sometimes filter cases or hide columns to create reports that are directed at certain efforts.
3. Supervisors at several agencies hold monthly, individual meetings with each Employment Counselor to review the status of every participant on his/her caseload, and determine action steps. Reports are a basic case management and staff supervision tool.
4. Reports are helpful for catching errors and for catching discrepancies between coding in WF1 and MAXIS.

Agencies gave examples of how specific reports are used, and offered suggestions about how they might be improved. In the list below, *italics* are used to indicate helpful information or action taken to address suggestions.

<u>Current Info Report</u>:

How it is used:

1. "Monthly cash grant" column is used to identify MFIP clients who might consider opting off.
2. "Maximum weekly unpaid hours" column tells counselors how many unpaid work hours a participant can perform while adhering to the Fair Labor Standard Act guidelines. This column will become more widely used as Ramsey County moves toward wider use of volunteering and internships.
3. "MFIP months" column helps counselors plan for completing the Observation checklist, 48 month checklist, Face to Face interview, Extension application, and other items with participants.
4. Comparing "monthly cash grant" columns is used to alert employment counselors when a family's situation may be changing.

Suggestions for how it may be improved:

1. FAS supervisor column could be eliminated as FAS worker assigned can be found elsewhere.
2. "S in self support index" column is useful to know, but agencies need more information to understand how it applies to their daily work.

   Refer to "Employment Services Report Card and Tools: Part 2 for Counselors" for information about the Self Support Index measure (page 18, slide 35). Agencies can also request additional training through their Planner.

<u>Preliminary Hours ("Prelim") List</u>:

How it is used:

1. This report is most useful for attending to activity hours and the WPR. Data specialists sometimes filter this report by counselor, by WPR/FSS, and some include only WPR cases in a report to counselors, to focus on activity hours for participants in the denominator.
2. Agencies highlight participants who are short 20 hours or less (instead of 10 as is highlighted on the report) and ask counselors to review case notes to find any additional hours that can be counted.
3. Some use "last benefit month" column to find coding or interface errors.
4. One agency has created a formula to determine the difference between retro and prospective hours so they can better interpret the prospective hour information on the report.

Suggestions for how it may be improved:

1. More than one agency requested a report at end of month that details the activity hours (retrospective) entered so they have the actual number to work with, rather than the prospective estimate. They expressed a desire to work with "the real data."

   Solution: MIS will supply a tab on the Data Specialist report, called "RetroHours," that reflects work hours from MAXIS for the current 3 month participation rate period, and the following month.
2. One agency requested that all highlights be left off as they remove highlights that come on the report and then create their own. Other agencies are still struggling to remember what highlights on each report indicate.

   Response: Highlights have been requested by some agencies. To easily remove all highlights, one can "select all" and choose the "no fill" option. Highlights are explained in the "Employment Services Report Card and Tools: Part 2 for Counselors" slideshow.
3. Add activities and months in each activity to help track participants who are lingering in certain activities too long.

   Solution: This information is provided on the "Open Activity" tab on the Data Specialist report.

<u>Data Specialist Report</u>:

This report is useful as an accounting of every participant at every agency. Information included in the PUP and No EP reports is also provided for the current month. Managers and Supervisors include information from the Data Specialist report in monthly meetings with staff, and/or send this report to counselors as a summary of their cases.

PUP Report:
This report was consistently noted as not very helpful. Complaints about the PUP included that the data included is too old so they can't do much to improve things, and they noted that they are watching this issue already through use of the Prelim List and Data Specialist report. It was also noted that reviewing and reporting back on participants in this report feels like an exercise that provides no help or learning. *Response: the PUP will be issued twice a year and include only those who have had less than 3 hours per month for 6 consecutive months.*

No EP Report:
This report was also said to be not very helpful. Information about EPs is included in the monthly data specialist report. Staff also receives ticklers that remind them an EP needs review (same with EMs). People who appear on the list are often in sanction, taking the child <1 exemption, or are a new client. Some agencies noted it feels like extra work to report back on participants who are on this list.
Response: the No EP report will be eliminated. Planners will review the data specialist report to determine if EP completion needs review at quarterly meetings.

Sanction Outreach Report:
While this report is generated to help agencies meet their contract requirement to provide outreach, two agencies reported this report as not really helpful. It was suggested that this report could be expanded to include sanction information for anyone who has had a sanction. Another agency reported they like this report because it is used to ensure the accuracy of sanction information included on current info report. One agency said that the information on this report can be outdated by time they receive the report.
The sanction outreach report includes only those who are currently in sanction and have over 3 sanction episodes. It is possible that a sanction is cured at the time the report is received. This report is issued to assist agencies with outreach efforts that are included in agency contract services.

Other:
No agency commented on any other report. The Indicators reports and Report Card were noted as good information to know, but again, no specific strategies were noted or offered. No one mentioned the Participation Rate by Counselor and Participation Rate by Agency reports. It seems agencies focus on WPR more through using the Prelim and Data Specialist Reports. The Indicators Report for DWP is so recently created that this report was not explored.

Summative suggestions:
1. Given that agencies routinely "repackage" reports before sharing the information with their staff, it was suggested that we might look at making the reports more user friendly so the "repackaging" was not necessary.

Because each agency repackages differently, it was decided that agencies be allowed to do this in a way that makes sense for them.

2. Use of the "Cheat Sheet" document can be useful for helping staff get up to speed on how to best use reports.
   Information from the Cheat Sheet has been incorporated into the "Employment Services Report Card and Tools: Part 2 for Counselors" training slides, so agencies have one central reference.
3. Including a legend on every report would be useful to smaller agencies.
   Lack of space prevents a legend from being placed on every report, but information is provided in the "Employment Services Report Card and Tools: Part 2 for Counselors." Descriptions for the Current Info items can be found on pages 14-20. Descriptions for the Preliminary Hours list are on pages 5-12.
4. One agency indicated they would appreciate a narrative summary included in reports, such as a summary of each agencies performance on the Report Card.
   The Report Card provides performance information and agencies can assess their performance based on criteria of their choosing.
5. One manager noted it is important to include the Data Specialist as a member of the management team, and elevate their status relative to Employment Counselors.
6. It was suggested that we should think about who we market to when creating reports. For example, if we choose to educate the legislature or influence outdated policy about MFIP ES, we might track and report information that highlights our successes or problems with certain policies, in addition to measures on the Report Card. We should also think about tracking information that would be used in grant applications.
7. Agencies that have branches in other counties consistently note how lucky they feel to have Ramsey generate this information for them.

Mark Herzfeld, Sue Keskinen, and agency Planners visit agencies to review reports and teach agency staff on how to best utilize reports. Alan Wanless and MIS staffs are available to answer questions and/or assist with use of the Data Specialist report. You may contact your agency Planner with any questions or concerns also.