Better Data, Less Work

Rethinking How We Use Technology to Engage with Clients and Generate Reports

Presented For:

NETWORK of Jewish Human Service Agencies

Micah Gold-Utting
Wednesday, May 13th, 2020.

athenasoftware.net

ATHENA SOFTWARE

background and experience

95+ full-time staff

19+ years experience

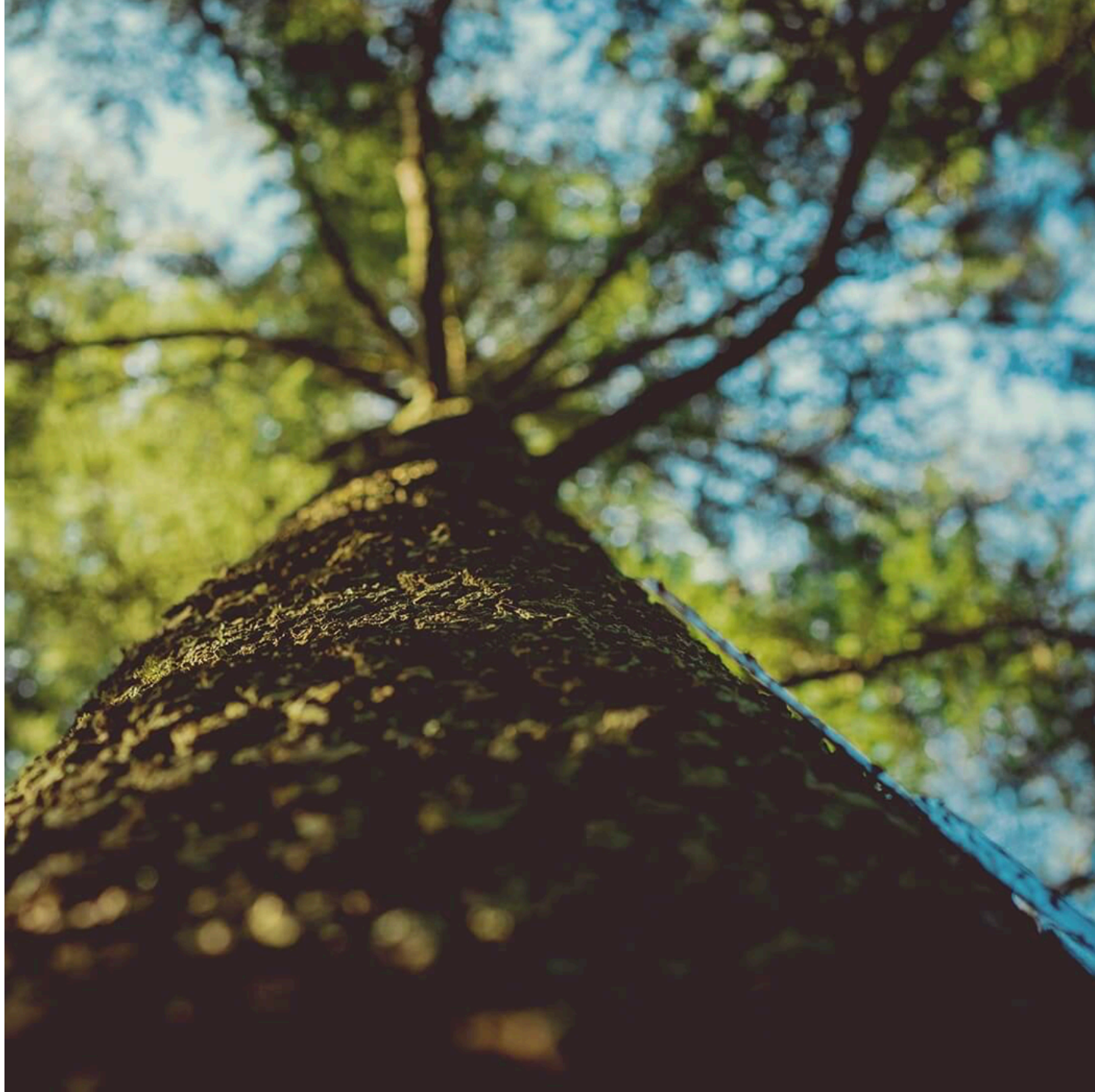
10,000+ users worldwide

athenasoftware.net

GOALS FOR THE PRESENTATION

Why are we here?

- An excuse to take a breath and think about:
  - Structure vs function of data
  - How we collect data
  - Where our data comes from
- To reinforce and solidify ideas that we currently know intuitively



Reporting

How do we get data out?

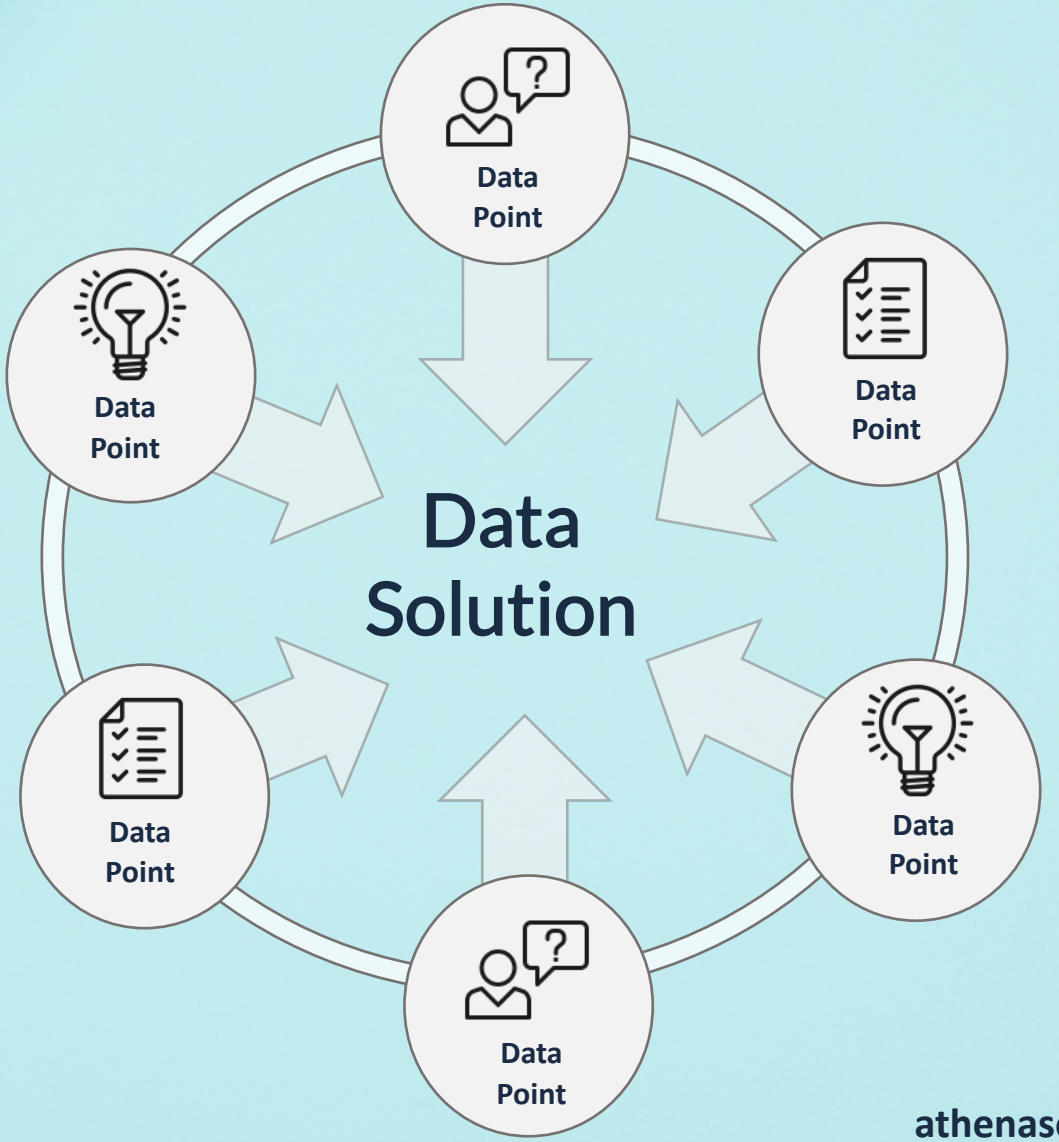
Store

Generate

Distribute

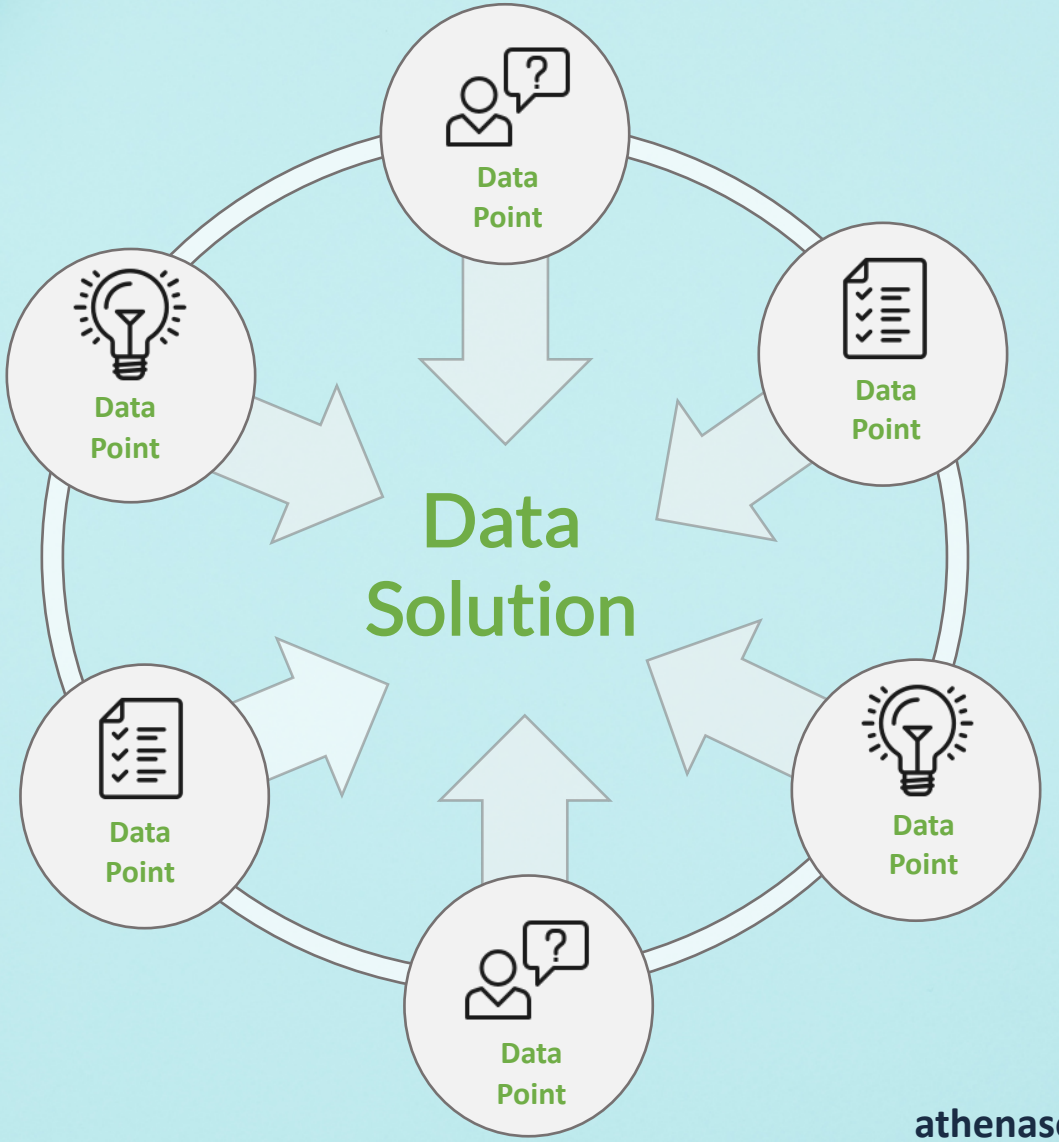
Reporting

Where does the data come from?



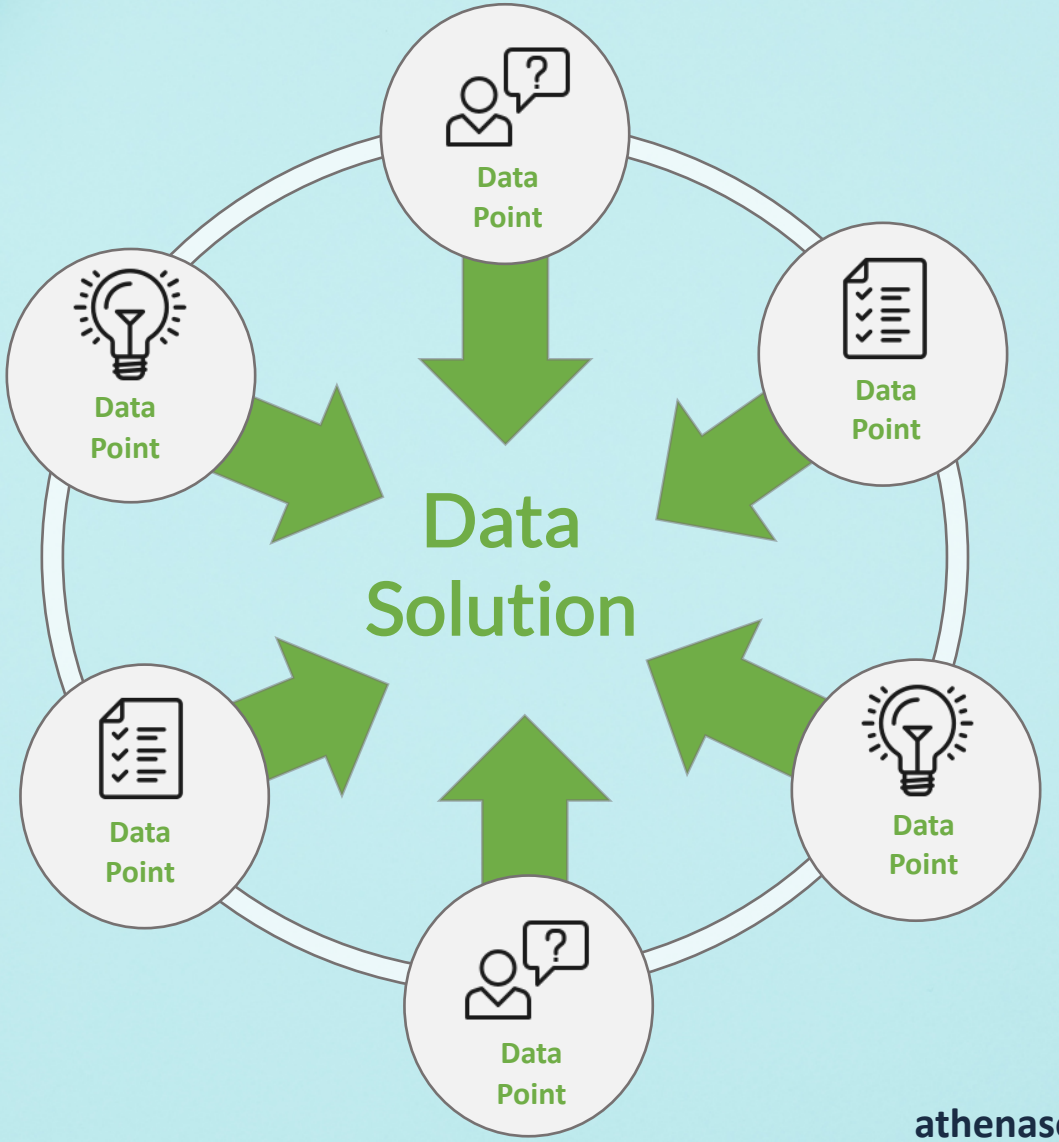
Reporting

Where does the data come from?

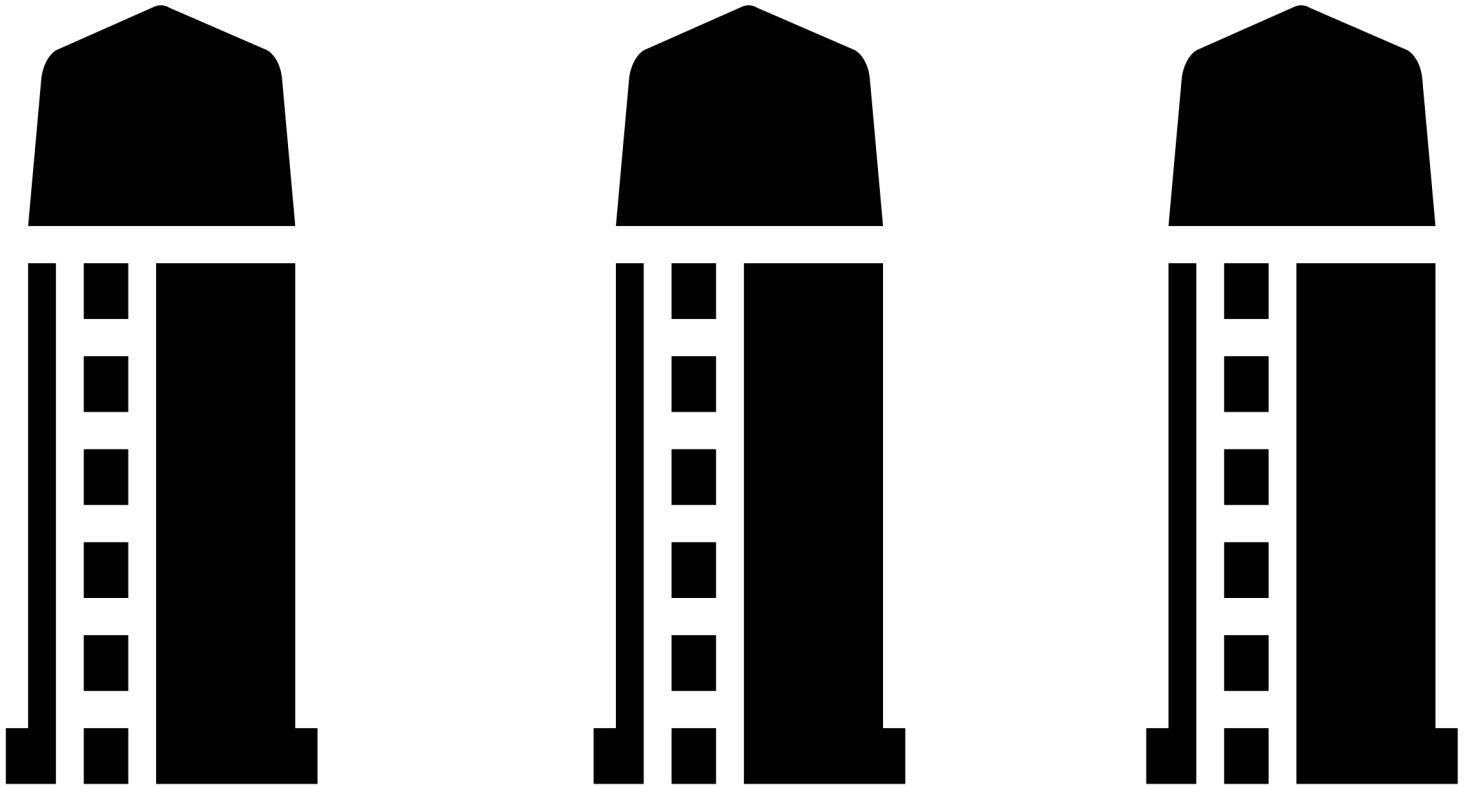


Reporting

Where does the data come from?



Silos



Traditional Silos

People and Teams

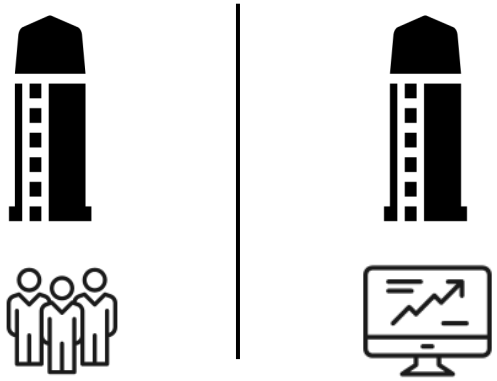
athenasoftware.net

Different teams; Different process

- Communication – “we operate in a different way”
- Systems – “we use a different tool”
- Reports – “we have different metrics”

Two More Silos

Us and Our Systems



- How does the work we are doing turn into data?
- What are the barriers to this process?

Two More Silos

Our Services and Our Clients

athenasoftware.net

Client data starts with the client

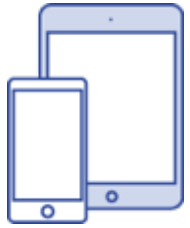
- A client has a ton of data about themselves:
  - Demographics
  - Issues
  - Responses

- Service Generates a Ton of Data
  - The action of service itself is data generating, regardless of what is actually logged.

Reporting increases workload when:

- We collect data we don't use
- We collect the same data multiple times
- We collect the same information in multiple ways
- Our reports aren't accurate

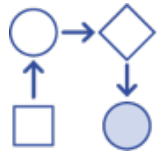
Opportunities to Reduce Pain



Tools you want to use

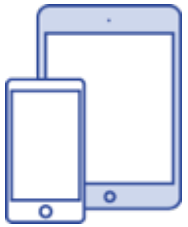
In the client's voice

Who for? Where From?



Right data, right place

Opportunities to Reduce Pain



Tools you want to use

- Are staff using the tools provided to manage their work, or only to feedback data?
  - Calendar?
  - Case Note?
  - Assessments?
- How do they want to work?

Opportunities to Reduce Pain

In the client's voice

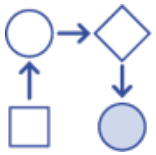
- Who is filling out the documents?
  - Clinician?
  - Client?
  - Admin Staff?
- How many times does the client have to tell us the same thing?
- Can the client see what they are completing?

Opportunities to Reduce Pain

Who for? Where From?

- Why is this piece of information being captured?
- Who will be using this information?
  - Will it be used for multiple purposes?
- Where was it originally generated?

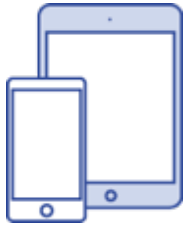
Opportunities to Reduce Pain



Right data, right place

- What does this data refer to?
- Can it be stored in association with when it was captured?
- What other data elements is it associated with?
- Does our system allow us to connect these entities as appropriate?

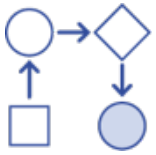
Questions to think about



- Are staff using the tools provided to manage their work, or only to feedback data?
  - Calendar?
  - Case Note?
  - Assessments?
- How do they want to work?

- Why is this piece of information being captured?
- Who will be using this information?
  - Will it be used for multiple purposes?
- Where was it originally generated?

- Who is filling out the documents?
  - Clinician?
  - Client?
  - Admin Staff?
- How many times does the client have to tell us the same thing?
- Can the client see what they are completing?



- What does this data refer to?
- Can it be stored in association with when it was captured?
- What other data elements is it associated with?
- Does our system allow us to connect these entities as appropriate?

Micah Gold-Utting

Micah.GU@athenasoftware.net

226.989.6843