Jan 21, 2015
WORKING MEETING

PUBLIC SUMMARY

Senior Initiative - Performance Framework

How do we ensure that Montgomery County is a "Community for a Lifetime"—and how do we know we are making a difference in the lives of older adults and their caregivers?

CountyStat

CountyStat Principles

- Require data-driven performance
- Promote strategic governance
- Increase government transparency
- Foster a culture of accountability

Outline

- **Goals**
- **Background and Context**
  - The County's Silver Tsunami by the Numbers
- **Implementing New Processes for Data-Driven Planning & Performance**
  - Tracking and Facilitating Collective Impact
  - Fully Implementing a Results-based Accountability Framework
  - Building a Common Information Base—Using Data to Deliver Performance
- **Priority Focus Areas**
- **Next Steps and Roadmap**

Purpose of Data-driven Reviews of Senior Initiative

What has worked, what have we learned, and what are we going to do moving forward?

Assessment of cross-cutting initiatives is more about examining collective impact than about individual program measurement. Note that CountyStat is working on the Positive Youth Initiative in parallel using a common approach.

Goal of Today's CountyStat Working Meeting

- ❑ Review, discuss, and finalize proposed measures and data owners for priority areas
- ❑ Review preliminary information base on county's senior population, define potential uses; and complete list of data sources and owners
- ❑ Commit to shared roadmap for implementing data-driven planning and performance management processes with clear roles and responsibilities
- ❑ Commit to yearly deadlines for data collection and analysis with regular follow-up to be conducted by CountyStat

Desired Outcomes

Departments are making data-driven decisions on all aspects (planning, programming, and budgeting) of the County's Senior Initiative

Information about the county's senior residents and the services provided to them are easily accessible, uniformly presented, and widely distributed

Demography is Destiny

BACKGROUND + CONTEXT

Growth in Senior Population = Game Changer

New Mindset

- **"When we talk about aging services, it's often been narrowly focused on Medicare, Medicaid, and the Older Americans Act…What's really exciting now is that the aging-friendly community movement is really broadening the discussion about what kinds of things we should be doing so older adults can continue doing things they've done throughout their lives."**

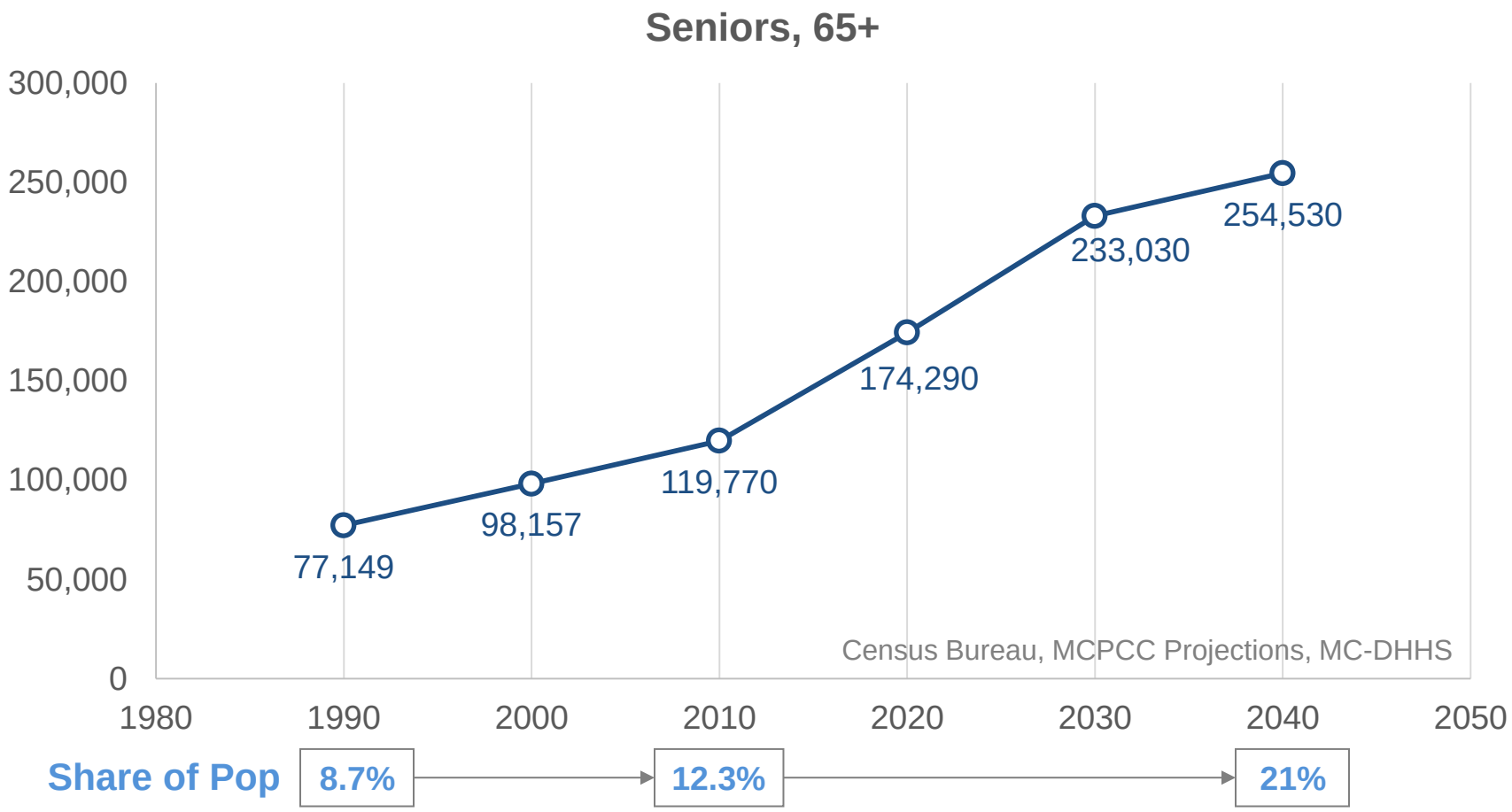
Amanda Lehning, University of Maryland
School of Social Work, Quoted by Politico

"It's About Dignity, Respect, and Freedom"

- Ike Leggett, Seniors Today, Jan 2015

Projected decrease in informal family supports will increase the role of communities, public agencies, and self-reliance

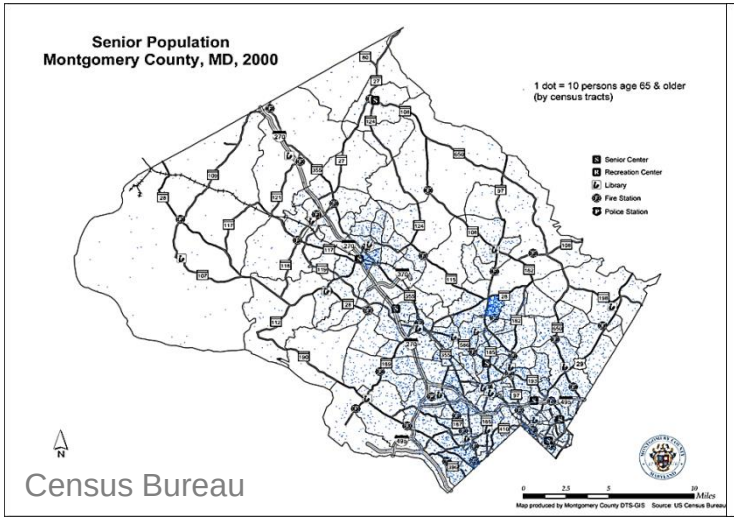
The Silver Tsunami in Montgomery County

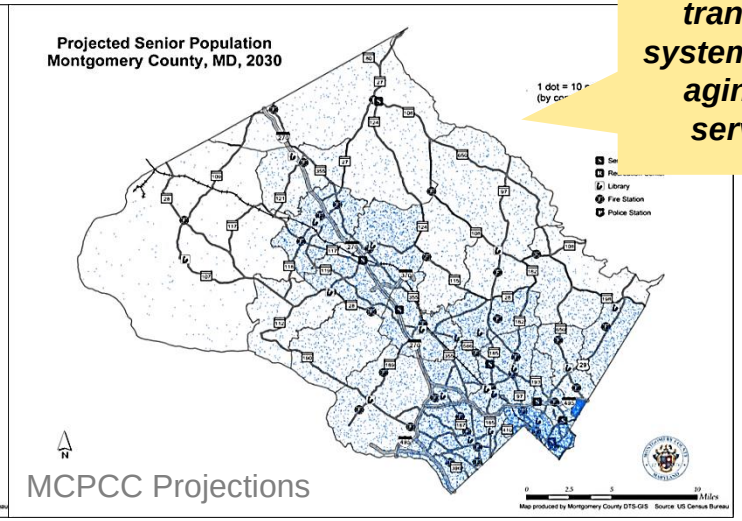


135,000 more residents 65+ (2010 v. 2040)—representing a **110% increase**, raising their share of overall population by **8.7% percentage points.** Montgomery County is ranked **#2 (Female-84.9) and #4 (Male-81.7)** in life expectancy (US Census).

The Silver Tsunami – Not just larger, but also different

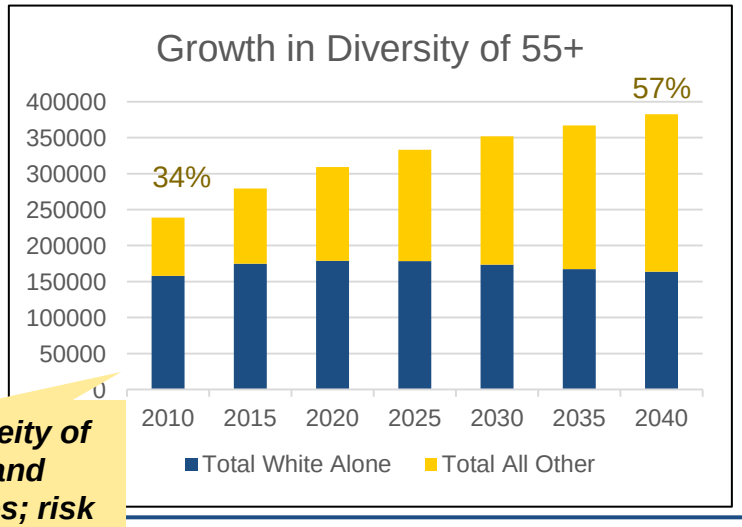
MORE DISPERSED





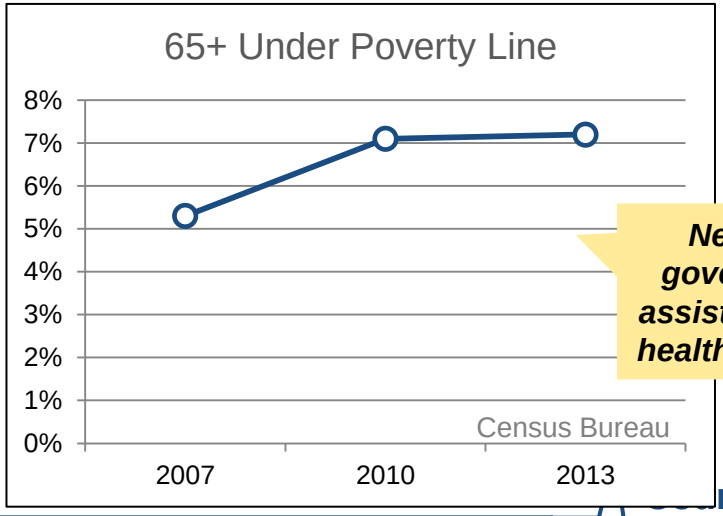
Pressure on transportation system, homecare / aging in place services, etc.

MORE DIVERSE



heterogeneity of needs and preferences; risk of isolation

MORE DISADVANTAGED



Need for government assistance and health services

Maryland Dep of Planning Projections

Sub-Cabinet Survey: Shared Call for Better Data

Importance of Data	Average (range: -3 to 3)	# Disagree (< 0, n= 17)
Good data on the needs and characteristics of the County's elderly population is essential for effectively planning and delivering services to seniors	Strongly Agree (2.5)	None
Montgomery County can -- and should be -- a leader in using data to inform the planning and delivery of services to seniors	Agree (+2.3)	None
It is important for my program(s) and department to have ready access to data on the efforts of OTHER departments so that we can better coordinate and identify needs for services	Agree (+2.2)	None
My DEPARTMENT / PROGRAM(S) have effective systems in place for tracking the performance of our services for seniors	Neither Agree nor Disagree (+0.4 / 3)	4
The COUNTY has effective systems in place for tracking the needs of senior residents and the performance of County services for seniors	Neither Agree nor Disagree (+0.3 / 3)	4

Ratings show a gap between where we are—and where we would like to be.

How? Focus on Process

- The two previous CountyStat meetings on Seniors (2008; 2013) have called for development of metrics and clearer strategic priorities.
- 2012's "Senior Agenda" states that "demographic data about older adults will be maintained, analyzed, and incorporated into planning."
- Satisfying these needs will require a more systematic approach with an emphasis on process, follow-up, and standardization.

To Be Compiled

CountyStat

Where We Want to Be By the End of the Calendar Year

A comprehensive performance plan with measures and key indicators for each Senior Sub-Cabinet workgroup

- Provide the County Executive, Senior Sub-Cabinet, OMB, external partners, and the Public with a clear, holistic overview of how we are doing

A common information base that delivers a composite picture and fact-based understanding of the county's rising senior population

- Meet Senior Agenda commitment: "Data about older adults will be maintained, analyzed, and incorporated into planning"

Clearly defined roles and responsibilities for an annual process of updating and sharing performance and community data

- Systematic approach for ensuring strategic alignment, unity of effort, and "collective impact"

"…while getting the policy right is hard, it is only 10 percent of the challenge. The other 90 percent is the blood, sweat, and tears of relentless implementation."

- Sir Michael Barber, Founder of the UK's Prime Minister's Delivery Unit

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Main Goal for This Cycle

IMPLEMENTING NEW PROCESSES FOR DATA-DRIVEN PERFORMANCE

Collective Impact Framework

Collective Impact is the "commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem."

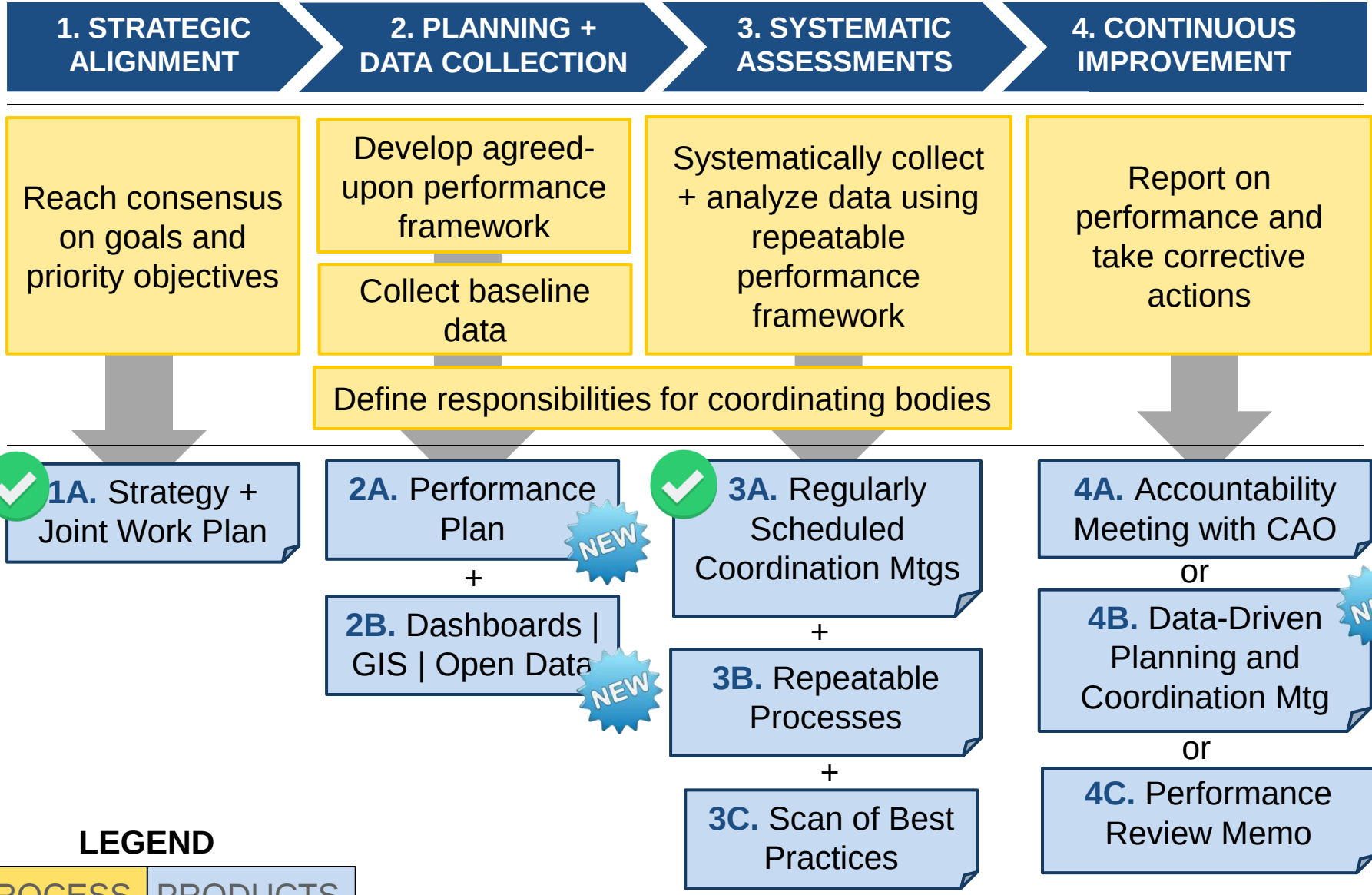
-John Kania & Mark Kramer in a 2011 Stanford Social Innovation Review article

5 Conditions of Collective Success	Seniors
1. A Common Agenda - A shared vision for change - A common understanding of a problem - A joint approach to solving it	✓
2. Shared Measurement System - Consistent collection and measuring of data - A short list of indicators at the community level across participating organizations	✗
3. Mutually Reinforcing Activities - Diverse group of stakeholders working together - Coordination of differentiated activities through a mutually reinforcing plan of action	✓
4. Continuous Communication - Develop trust - Common vocabulary - Regular meetings	✓
5. Backbone Support Organization - Dedicated staff and defined responsibilities - Systematic coordination, data collection, reporting, etc.	✓

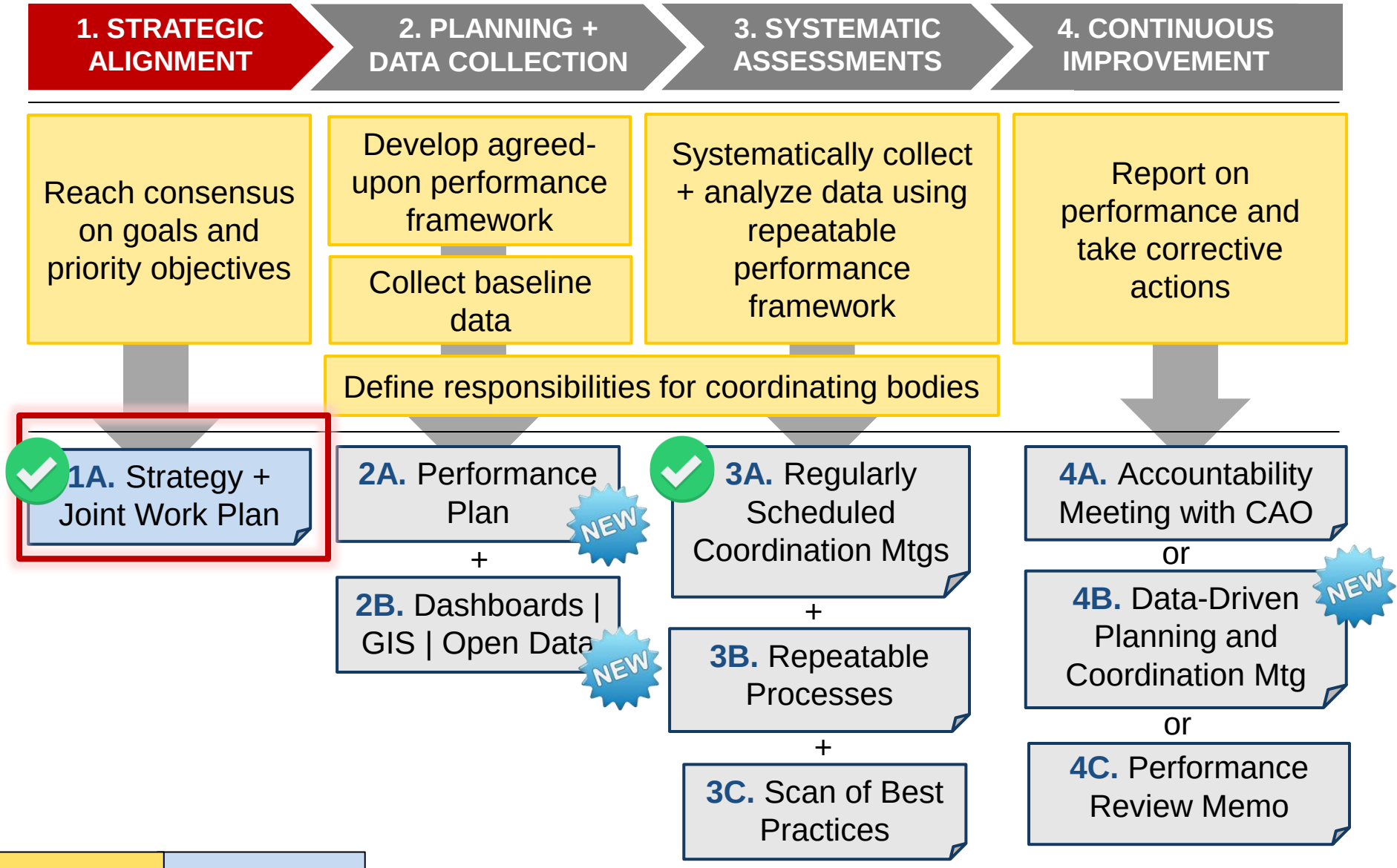
Currently being developed

✗ **Incomplete** ✓ **Partially Aligned** ✓ **Fully Implemented**

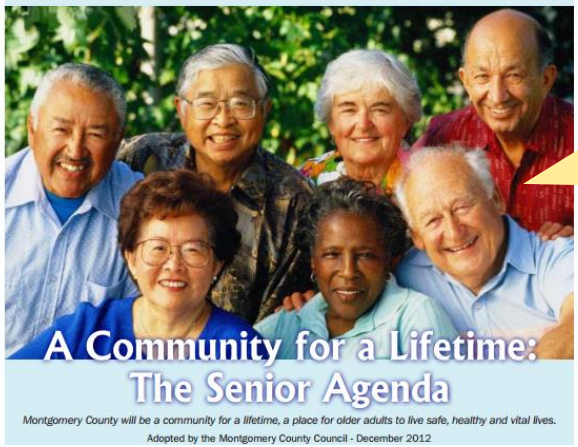
Implementation: CountyStat Performance Delivery Approach for Cross-Cutting Initiatives



1. Strategic Alignment



1A. Strategy and Common Agenda



The Senior Agenda provides a collective vision for the County's work with Seniors

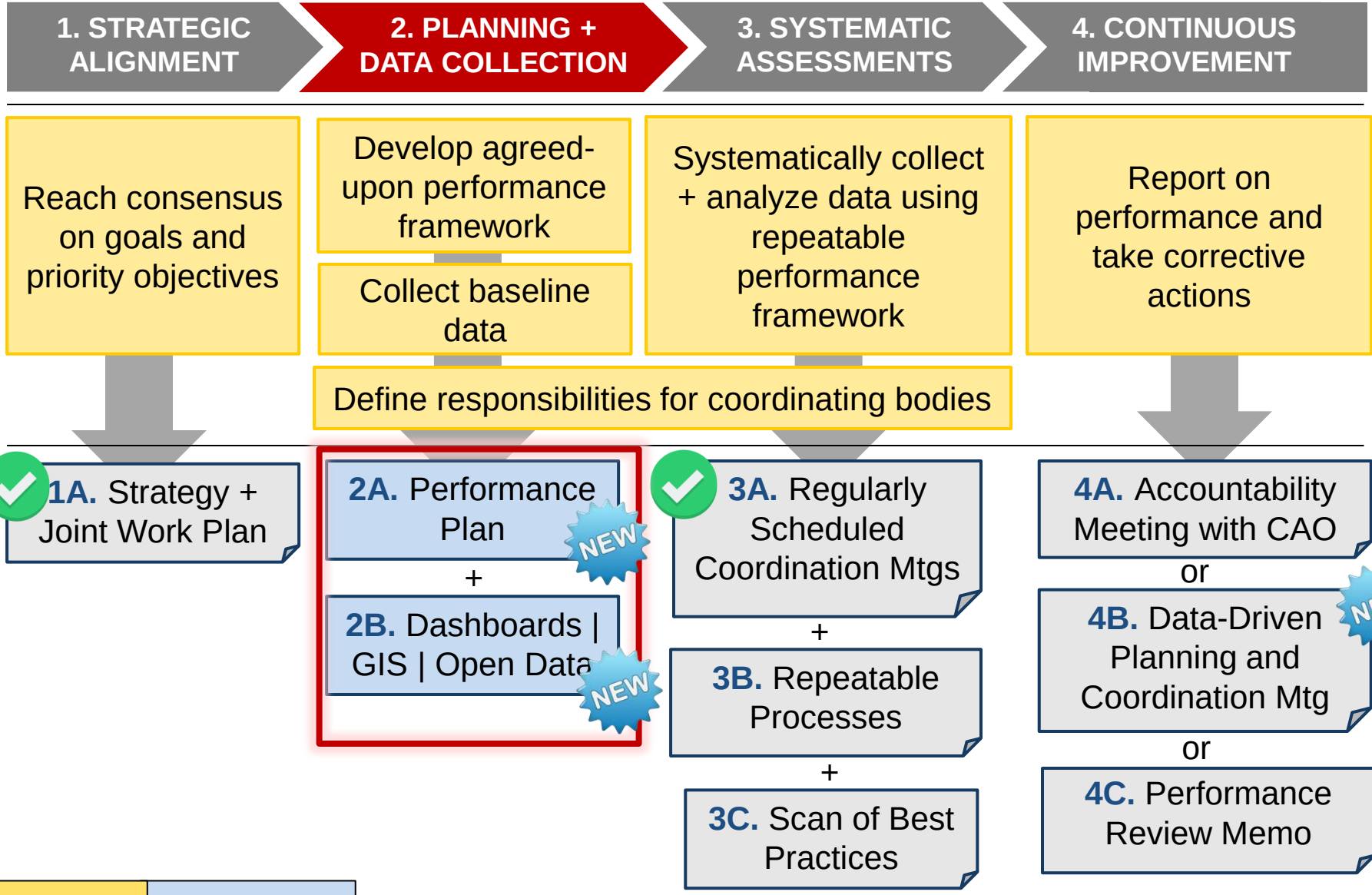
SCAN OF THE LANDSCAPE

AGE-FRIENDLY CITY	SENIOR AGENDA: Transportation	Housing	Socialization and leisure	Employment	Communications	Health and wellness	Secu… and safety
Outdoor spaces and buildings							
Transportation							
Housing							
Social participation							
Respect and social inclusion							
Civic participation and employment							
Communication and Information							
Community and health services							

Global trend and best practice is to implement the World Health Organization's Age-Friendly Cities framework—the Senior Agenda is already very much of the same "mindset"

CountyStat

2. Planning and Data Collection



2A. Performance Plan: Results-based Accountability

"Program and agency managers have two kinds of responsibility. They have a program management responsibility to produce the best possible performance for the services they administer. And they have community leadership responsibility to bring together the necessary partners to make progress at a population level."

-Mark Friedman in Trying Hard is Not Good Enough

Community-Level

Program-Level

Results-based Accountability Components	Seniors
Results: Overarching goals and desired outcomes for each Focus Area within the initiative (What are we trying to accomplish?) [ex: "children are succeeding in school"]	✓
Indicators: High-level headline measures and indicators to quantify achievement of results (What are we trying to impact?) [ex: 3rd grade reading scores]	✗
Strategies and Programs: Collection of coherent actions aimed at improving results, as documented via a catalog of programs, activities, and services (What are we doing to achieve our goals and have the desired impact?) [ex: tutoring program]	✓
Performance Measures: Output measures and supporting measures (How much are we doing, How do we know how well we are doing, and who is better off?) [ex: % of tutoring program participants showing improved reading scores]	✓

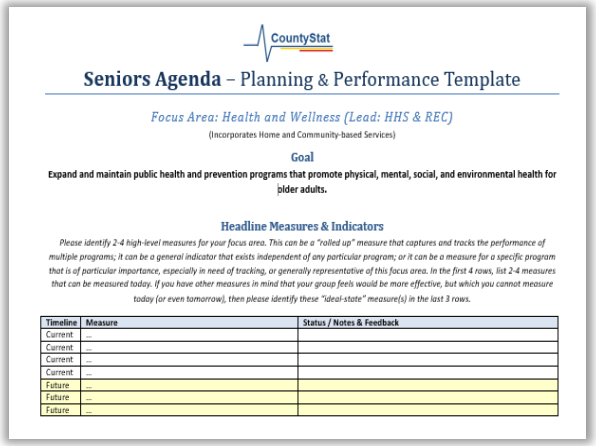
Currently being developed

Currently being streamlined

✗ **Incomplete** ✓ **Partially Aligned** ✓ **Fully Implemented**

2A. Implementation: Template for Data Collection

- **Based on the same approach used for departmental performance plans; to be used for annual data collection**



CountyStat

Seniors Agenda – Planning & Performance Template

Focus Area: Health and Wellness (Lead: HHS & REC)

(Incorporates Home and Community-based Services)

Goal

Expand and maintain public health and prevention programs that promote physical, mental, social, and environmental health for older adults.

Headline Measures & Indicators

Please identify 2-4 high-level measures for your focus area. This can be a "rolled up" measure that captures and tracks the performance of multiple programs; it can be a general indicator that exists independent of any particular program; or it can be a measure for a specific program that is of particular importance, especially in need of tracking, or generally representative of this focus area. In the first 4 rows, list 2-4 measures that can be measured today. If you have other measures in mind that your group feels would be more effective, but which you cannot measure today (or even tomorrow), then please identify these "ideal-state" measure(s) in the last 3 rows.

Timeline	Measure	Status / Notes & Feedback
Current	…	
Current	…	
Current	…	
Current	…	
Future	…	
Future	…	
Future	…	

The templates have been prepopulated based on past discussions, surveys, and feedback. This list will be refined and finalized through structured reviews. Departments may be able (and are encouraged) to reuse existing departmental CountyStat measures.

2 - 4 Headline Measures and Indicators: "What are we trying to impact"

- **Example:** Housing—% of seniors who are housing cost-burdened or # of affordable housing units for seniors

Catalog of programs and outputs: "How much are we doing ?"

- **Example:** # of meals delivered; class participants; permits for home modification; or bus passengers

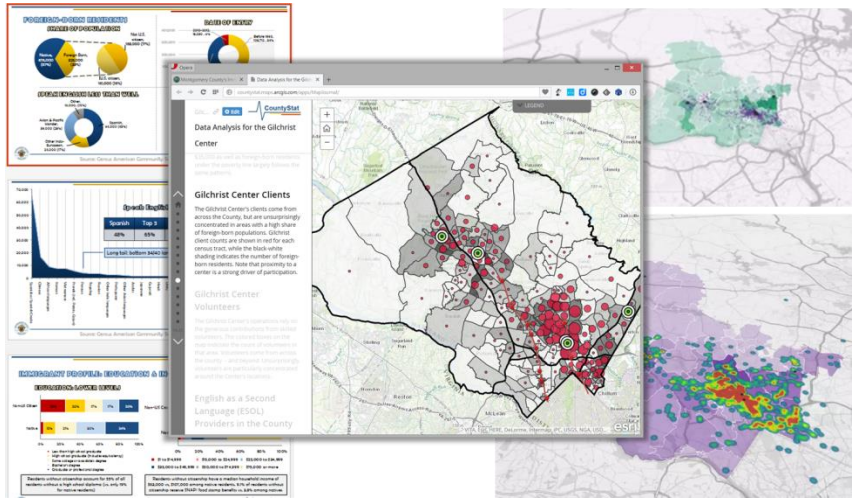
Supporting measures: "How do we know how well we are doing, and who is better off"?

- **Example:** % remaining healthy/in home after 12 months; client satisfaction rating; % avoiding eviction; pre- and post-test outcomes

2B. Building a Common Information Base: Reusable Tools and "Actionable" Data (i.e. Beyond PowerPoint)

CountyStat is making use of its new toolset (ArcGIS, Socrata, R, etc.) to build out dashboards, maps, and other reusable products for a number of cross-cutting initiatives.

COMMON INFORMATION BASE



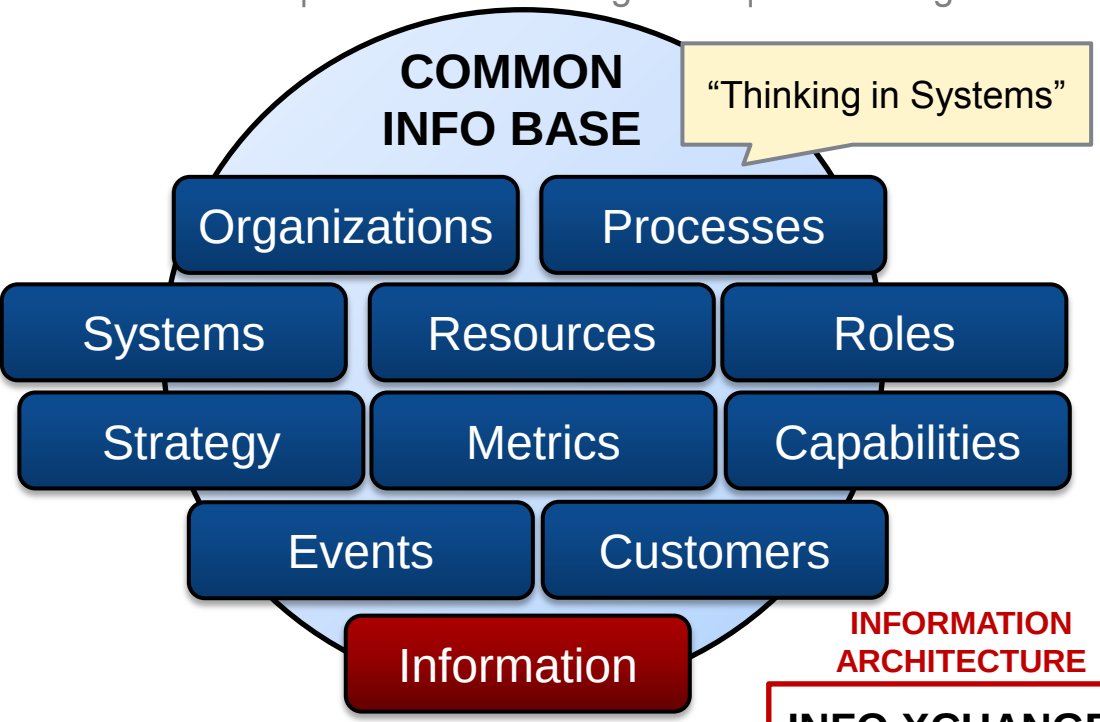
ONE information base, MULTIPLE uses

INFORMING DECISION MAKING

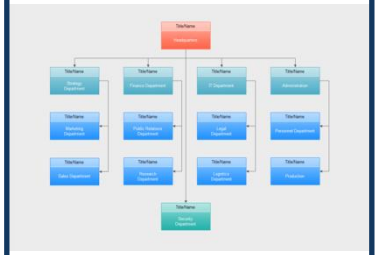
DAY-TO-DAY & PROGRAM-LEVEL	Dept A	Dept B	Dept C
COLLECTIVE & STRATEGIC	Sub-Cabinet	CountyStat	OMB
PUBLIC ACCOUNTABILITY + COLLAB	Partners + Public		

2B Goal: Synthesize Data into a "Common Operating Picture"

Coherence | Connections & Alignment | "Line of Sight"



WHO

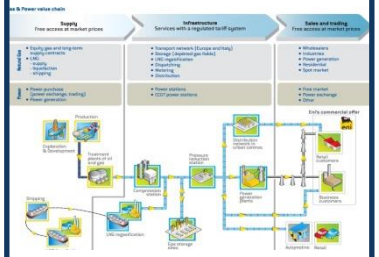


org charts

WHAT

capability maps

HOW



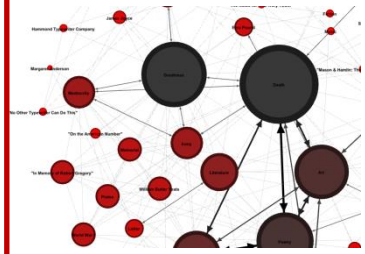
process maps

WHY

strategic plans

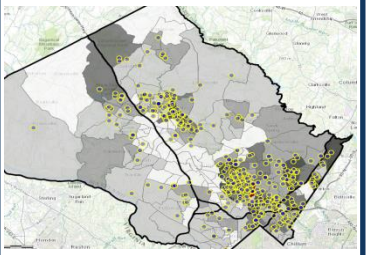
INFORMATION ARCHITECTURE

INFO XCHANGE



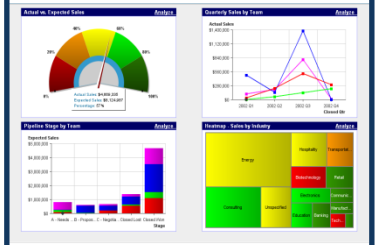
info sys & flows

WHERE



GIS maps

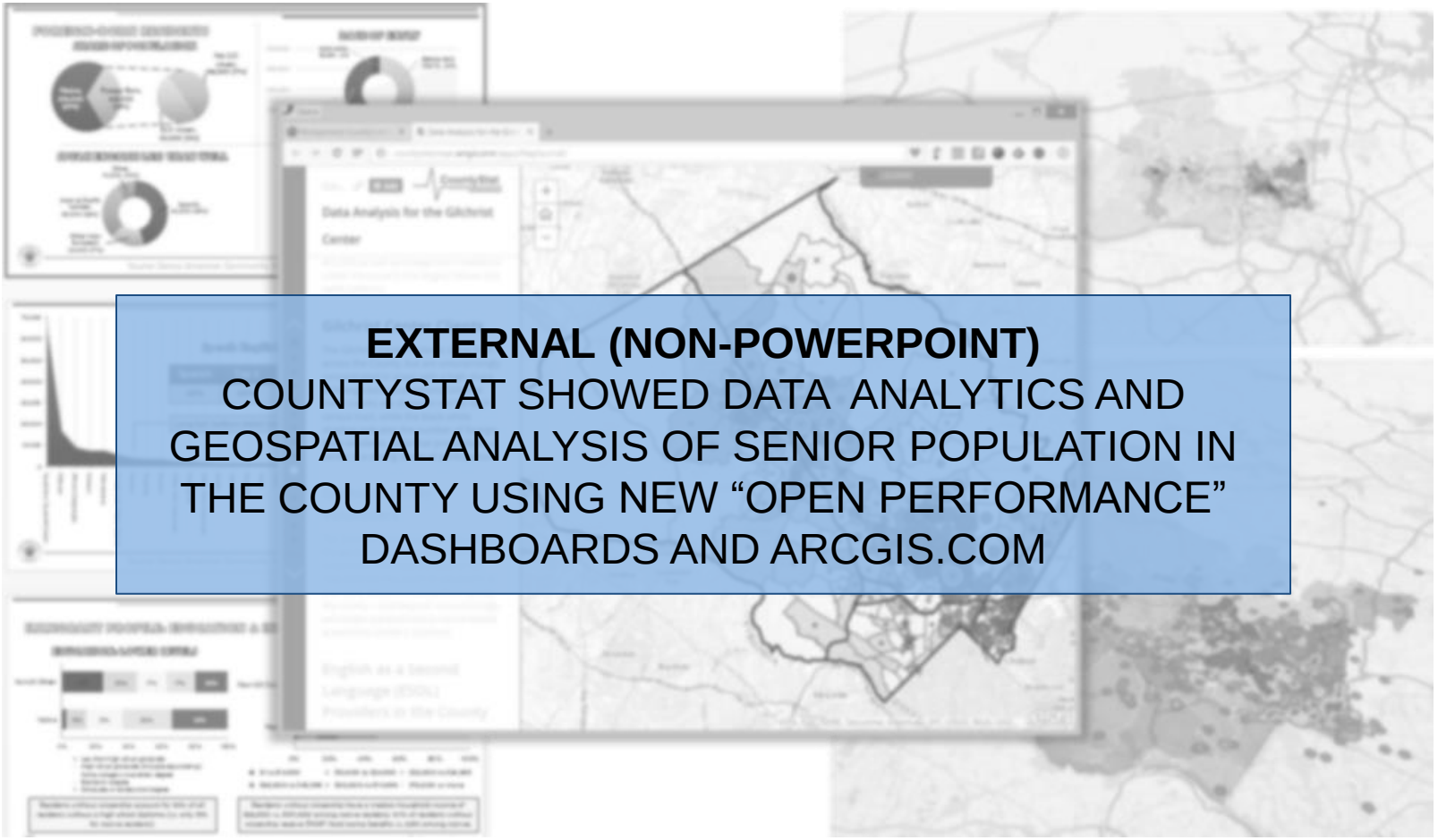
WHEN/HOW WELL



dashboards

- **Descriptive Analytics:** Learn from the past
- **Decision Analytics:** Facilitate coordination and decision-making
- **Predictive Analytics:** Identify priority hotspots for proactive action

2B. Demonstration: Using Data to Help Guide Our Efforts and Drive Performance

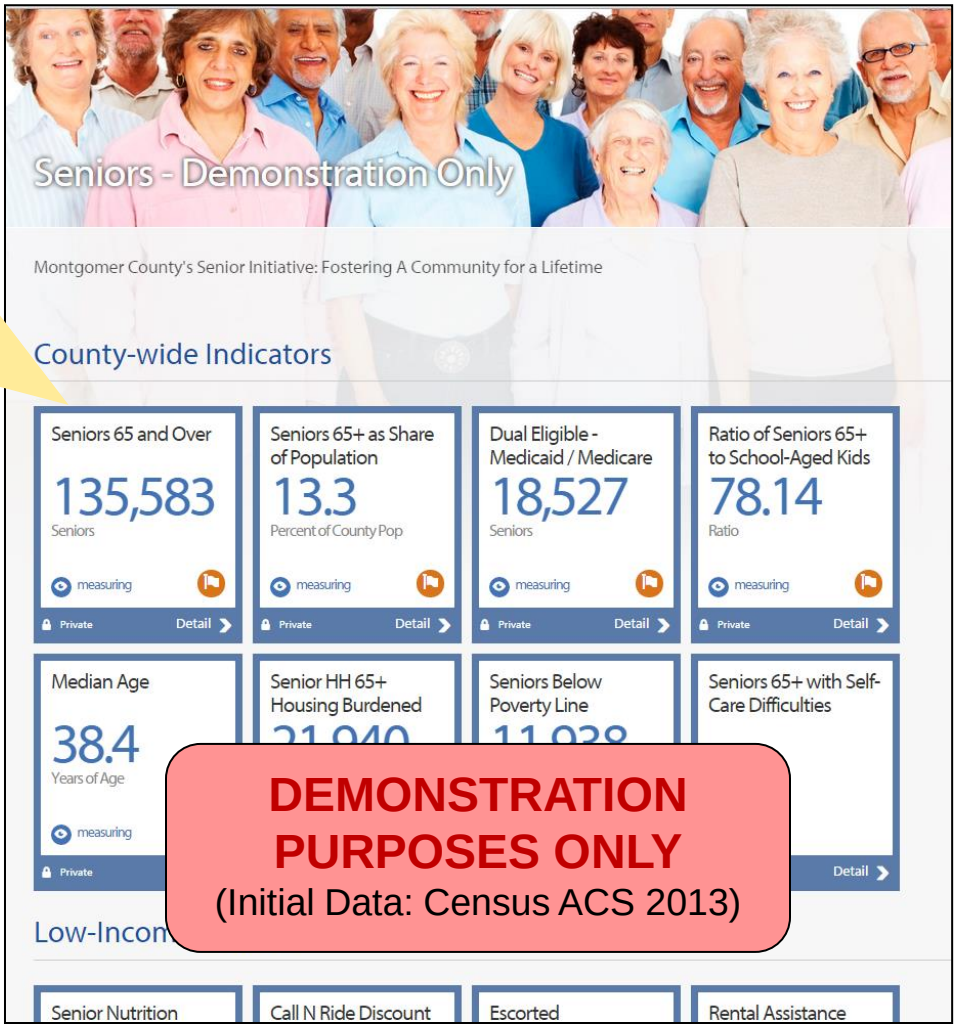


EXTERNAL (NON-POWERPOINT)

COUNTYSTAT SHOWED DATA ANALYTICS AND GEOSPATIAL ANALYSIS OF SENIOR POPULATION IN THE COUNTY USING NEW “OPEN PERFORMANCE” DASHBOARDS AND ARCGIS.COM

2B. Seniors Dashboard: Demonstration (Prototype)

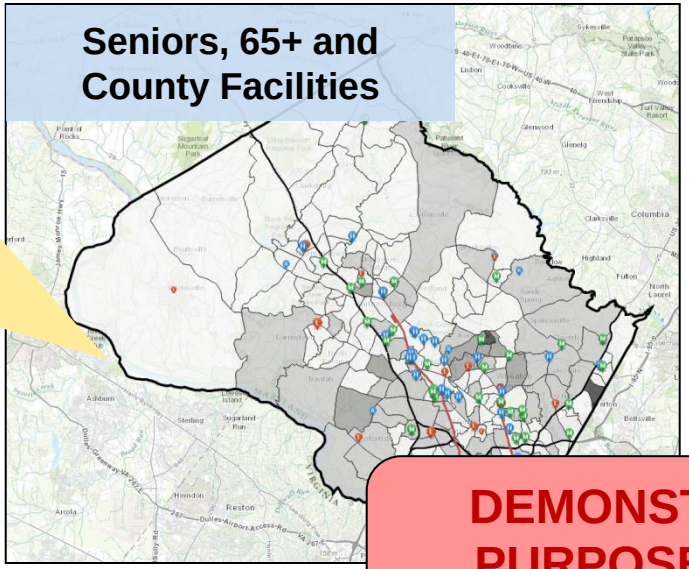
Demonstration of planned "Silver Montgomery Dashboard" using soon-to-launch CountyStat's OpenPerformance Platform

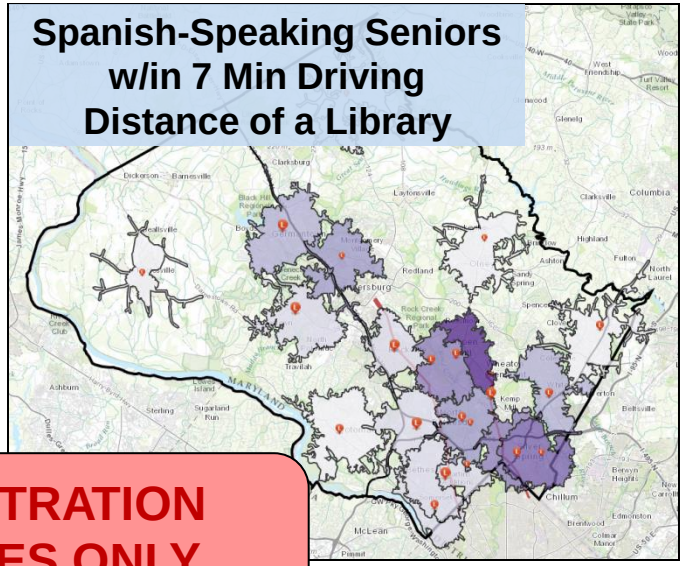


CountyStat

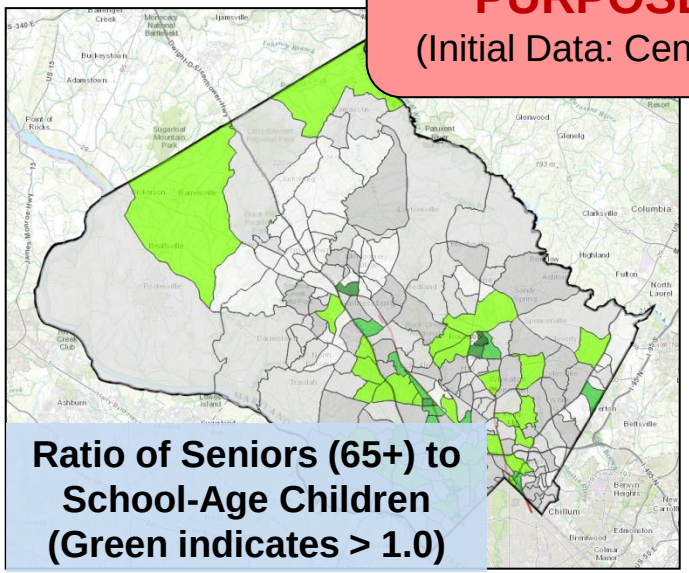
"Silver Montgomery" Map: Demonstration (Prototype)

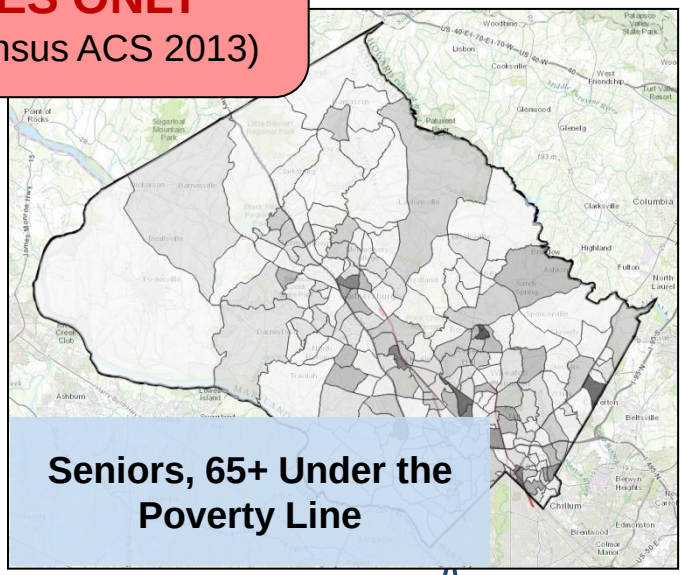
Demonstration of potential map-based applications using community analytics regarding seniors



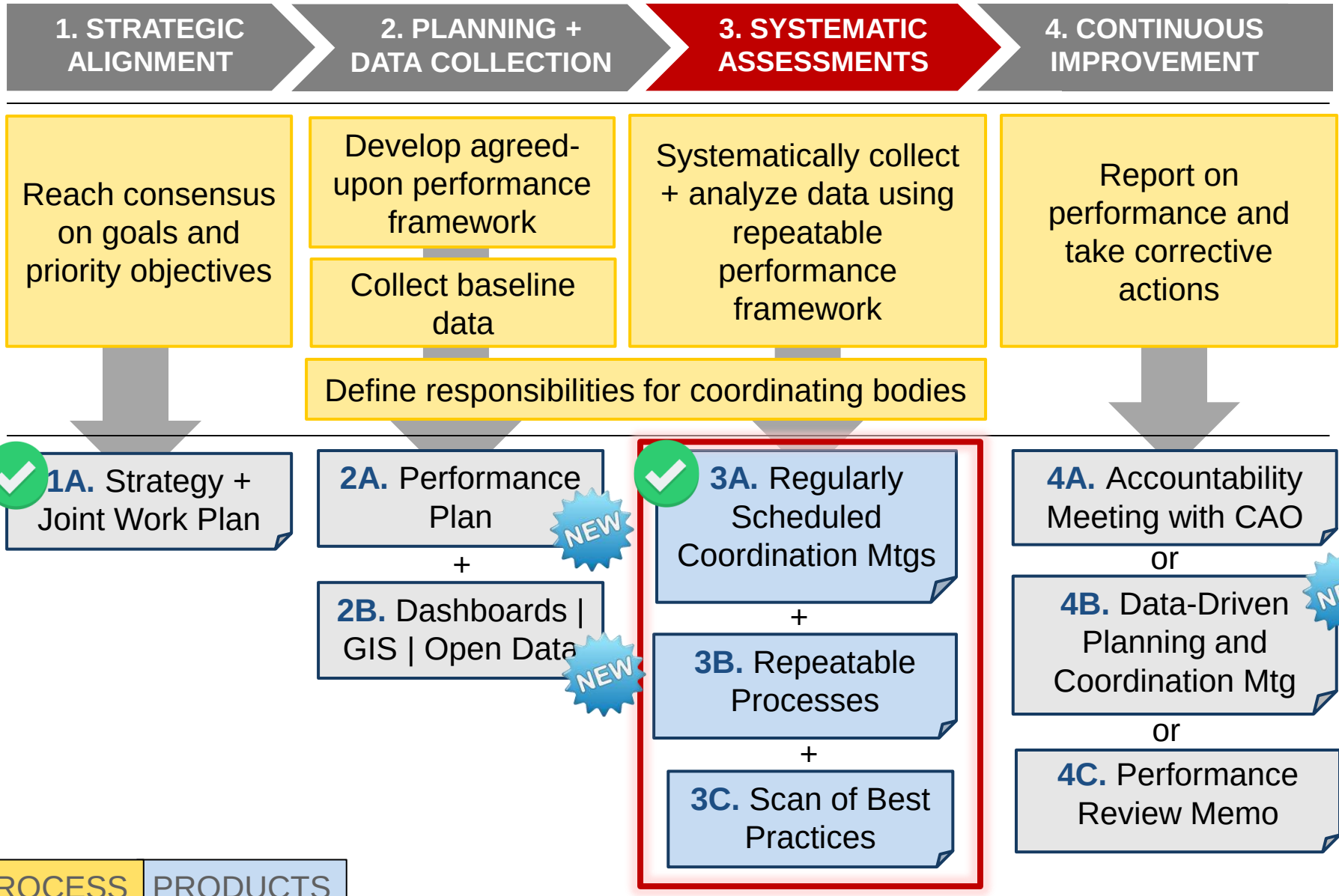


DEMONSTRATION PURPOSES ONLY
(Initial Data: Census ACS 2013)





3. Systematic Assessment



3A. Coordination – Senior Subcabinet Contributions

CountyStat surveyed the Senior Sub-Cabinet in December to explore its contribution to the Senior Agenda. Average score among all measures is **4.9 out of 7** (n=15)

HIGHLY RANKED (> 5 / 7 score)

- Helped improve collaboration and communication among departments
- Helped boost knowledge about County services for seniors among STAFF
- Helped instill a common purpose and cohesive effort across departments
- Helped improve the effectiveness of County services to seniors

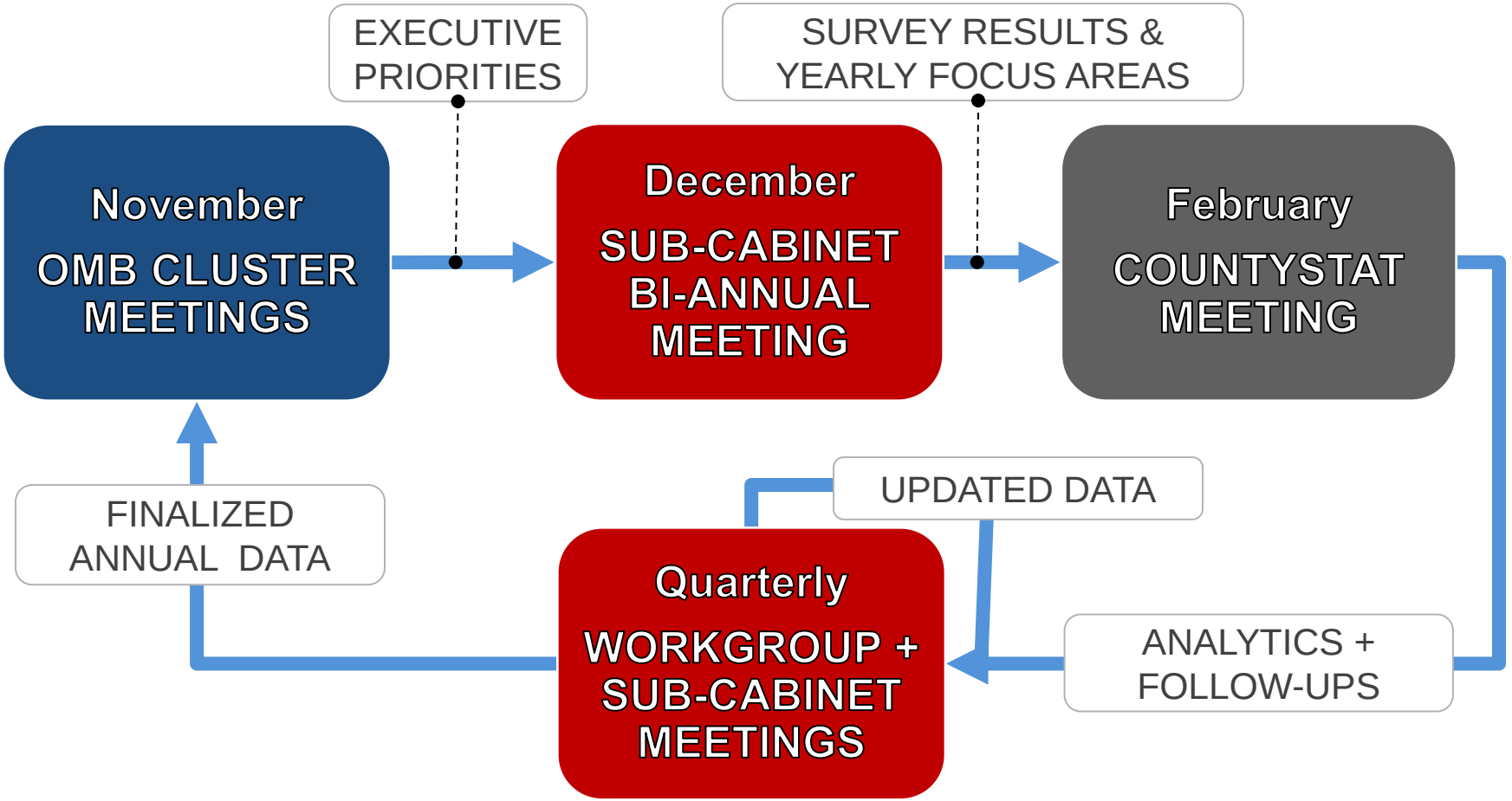
MIXED REACTIONS (> 4.8 / 7 score; but also more than 3 scores < 4)

- Improved collaboration btw. the County gov't and external partners
- Helped the County strategically plan for the needs of our aging community

OPPORTUNITIES FOR IMPROVEMENT (< 4.6 / 7 score)

- Improved knowledge about County services for seniors among RESIDENTS
- Helped maintain, analyze, incorporate data on seniors for evidence-based decisions
- Helped accelerated the sharing and dissemination of best practices and innovations

3B. Systematic Roles and Responsibilities for Coordinating Bodies: Discussion



The Senior Initiative is served by an existing infrastructure of coordinating bodies. CountyStat proposes that these groups adopt an explicit “unity of effort” by defining clear inputs and outputs across these bodies.

CY2015

PRIORITY FOCUS AREAS

Transportation | Affordable Housing | Low-Income Seniors

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1A. Common Agenda: Shared Priorities for CY15 Focus

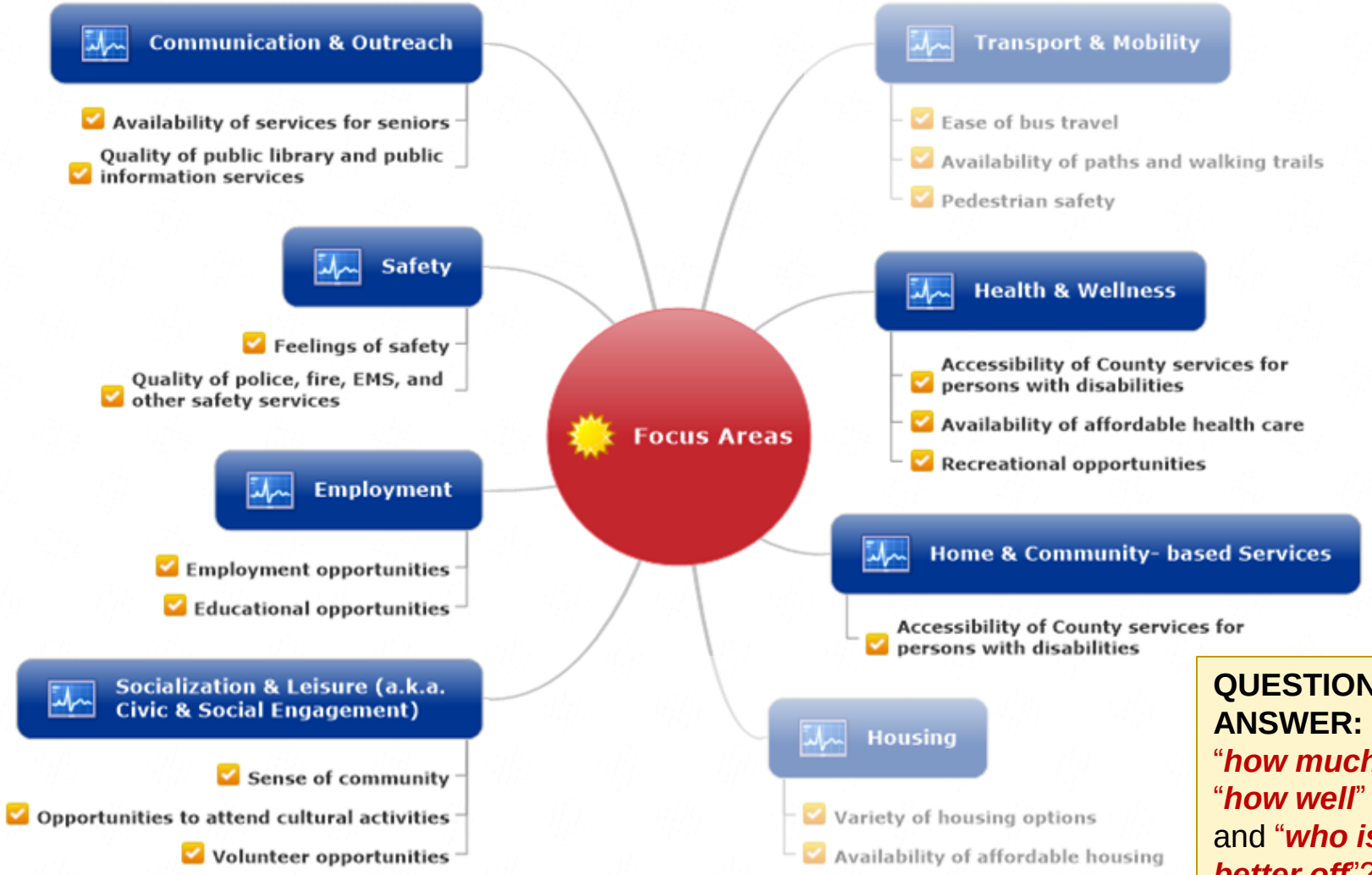
The December Survey of the Senior Sub-Cabinet members showed strong consensus around three main focus areas for CY15 (and beyond):

HIGHEST RANKED
(Median Rating = "Most Important")

Transportation services and mobility	Access to affordable housing	Low-income seniors
9 "Most" | 75 Score	8 "Most" | 77 Score	7 "Most" | 69 Score

Also areas with the most "unknowns"; closely tracks priorities identified in Towson Study as well as by the County Executive on Seniors Today (Jan 2015)

Other Focus Areas: Completed Performance Templates Due in FY15-Q3



QUESTIONS TO ANSWER:
"*how much*" →
"*how well*" →
and "*who is better off*"?

Taking a Systematic Approach

NEXT STEPS + ROADMAP

Proposed Implementation Roadmap

Quarter	A: Performance Framework	B: Common Information-base
FY15-Q3	Completed draft of the performance templates for each workgroup (performance measures, goals, and indicators)	Defining of "data owners" and brainstorming meetings btw CountyStat and programs/workgroups
FY15-Q4	Provide FY14 and historical data for performance measures	Collection of readily available geospatial and other "mapable" data; Optional training
FY16-Q1	Provide FY15 data	Reporting out on key findings from geospatial analysis and assessment of data gaps
FY16-Q2	Finalization of the FY15 Performance Plan (to be aggregated by CountyStat; reviewed by workgroups); annual survey of Sub-Cabinet members on progress and priorities	FY15 data refresh; gathering of priority research questions and associated data requirements
FY16Q3	2016 Annual CountyStat Meeting ("SeniorStat")	

Focus on process, sequencing, and follow-up so that data-driven performance management can be implemented, systematized, and internalized.