

Community Action Network Data System Go-Forward Plan

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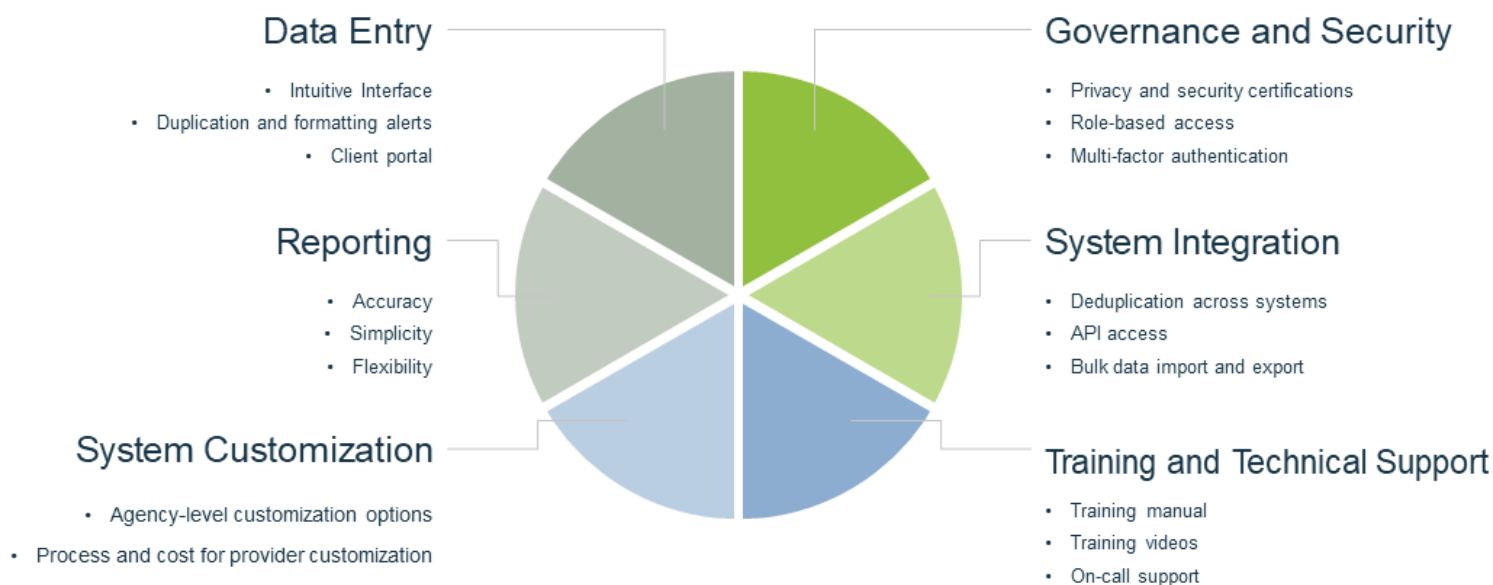


The data system most likely to meet the needs of Iowa's Community Action Network is CAP60, followed by eLogic Genesis. CAN stakeholders unanimously supported creating a governance board to consider testing system features, select providers, and negotiate contracts.

Identified Needs of Stakeholders

The Public Science Collaborative conducted two surveys, six focus groups, and three workshops on behalf of the Community Action Network (CAN) to evaluate their current data systems' effectiveness and feature gaps. Across these settings, CAN stakeholders were iteratively asked, "What works well for you in your current data system?" And "How might a future system better meet your needs"? The resulting usability principles, also known as heuristics, were then refined into "apples-to-apples" criteria that became the basis of PSC's data system evaluation.

To better meet the needs of CAN's target data users and achieve more effective and impactful results, we recommend future systems address these six human-centered heuristics: **Intuitive Data Entry**- The data system should have interfaces that are easy to use, support de-duplication, flag errors, and improve the overall user experience. Of particular need are systems that have error alerts, support de-duplication within and across agencies, and improve the usability of entry portals. **Accurate Reporting**- Reports generated by the system should be trustworthy and reliable, with access to all relevant fields and data. **Customizable Systems**- The data system should allow for agency-level customization with tailored options for specific agencies or groups of agencies. **Strong Governance and Security**- The data system must ensure security and privacy with privacy certifications, multi-factor authentication, and role-based access controls. **Seamless Integration**- Integration with other systems through APIs or bulk data transfer can improve accuracy, facilitate efficient workflow, and reduce the chance of double entry. **Adequate Training and Support**- Data system users should have access to role-specific training materials, on-call support, and a formal training process to ensure everyone can effectively use the system. More information on these six heuristics and their use in evaluating five potential CAN data systems can be found here: <https://go.iastate.edu/RG7HMF>.



"Everyone should have information about the system and how the agency is using the system."

"The accuracy of our reports has a direct impact on our ability to administer the program and funds we get that the federal government promised."

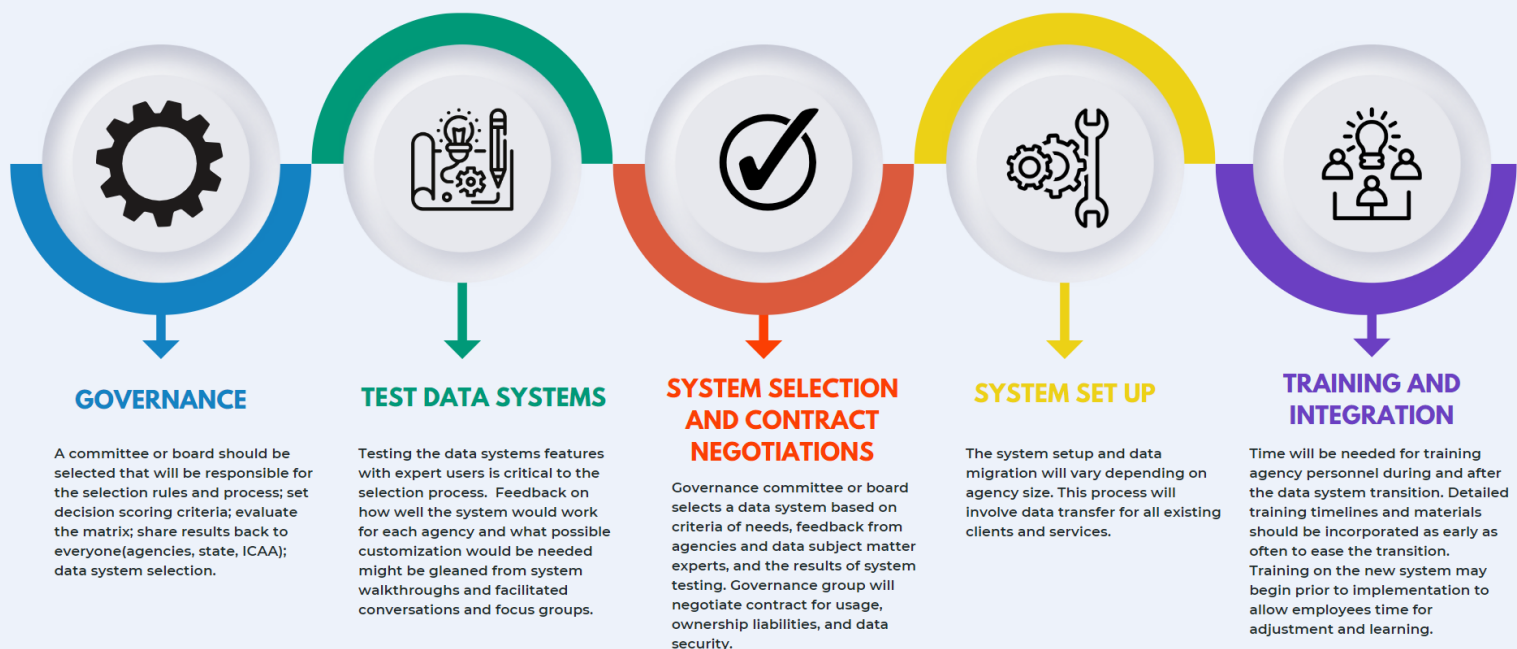
"The current system was selected at the federal level to meet the federal needs. We need a system that we pick that meets our needs."

Roadmap for Decision Making

There was unanimous support among CAN members to improve their current data system, but there was mixed support for how this might occur and who should lead the process. To help answer these questions, PSC hosted a Governance Workshop where groups identified a variety of potential governance options, including the need to:

1. **Establish a Governance Board** that includes agency leaders, data reporting directors, ICAA leaders, and state program leaders. The Board will determine rules and processes for selecting and implementing a new data system.
2. **Establish an Advisory Committee to the Board** comprised of subject matter experts such as report generators, data entry staff, vendors, administrators, and state and agency leaders. The Committee will advise on the system's uses and needs, interview users nationally, support the pilot process, and gather relevant information to support the Board.
3. **Test System Features** by soliciting expert advice from agency data users
4. **Build Trust by Working with Agencies to Answer the Following Questions.** Who will oversee the system and make final decisions about system selection and data standards? Who is liable for the data and maintains data security? Who pays for the system, and how will agencies divide costs? Who makes decisions about the system? Is consensus needed or majority rule? How will voting power be divided (e.g., will large agencies have more say)?

ROADMAP FOR DECISION MAKING

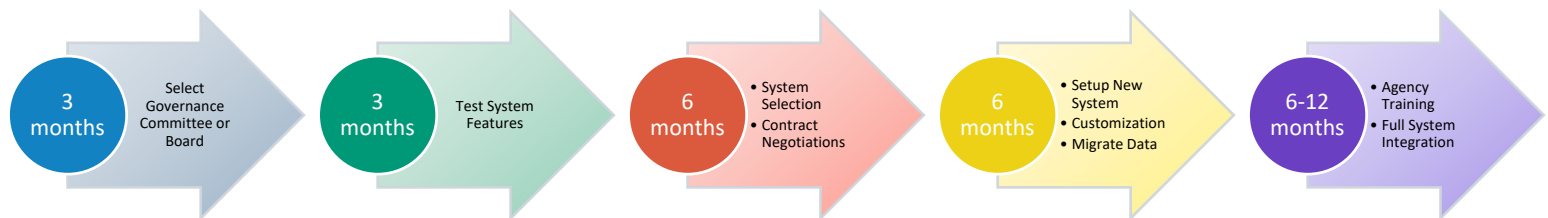


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Timeline

An aggressive but reasonable **data transition timeline is 24-30 months** covering the period from the creation of a Community Action Network Governing Board to the conclusion of training system users on the new process. The full process includes three months to establish a Governing Board and get buy-in from agencies on the decision-making process about to occur, three months to test selected system features and begin change management discussions with agency staff and leaders, six months for system selection and contract negotiations and continued change management communications to keep agency leaders and staff informed of the process, six months to set up and customize the new system and migrate data, and six to twelve months for agency training and full system integration. Note that the data training can happen concurrently with the system data migration and customization if data system providers provide training with simulated data.



System Recommendations and Cost

After careful evaluation, PSC recommends CAP60 as the top data system choice for Iowa's Community Action Network. eLogic Genesis is a strong second option. An overview of system features is provided below:

- **CAP60** is a well-rounded data system with an average rating of 'Excellent' on the six usability criteria. CAP60 excels in data entry and customization, with a client portal, an intuitive interface, and extensive options for the customization of programs and client intake. The system also has significant integration with other systems, including ChildPlus, and has set up API connections with other systems where possible or bulk import and export processes for outside systems that do not have APIs. CAP60 provides unlimited training as part of its offerings, including on-call support staff, video tutorials, and one-on-one or group training. The client intake has been translated into over 100 languages and can be flexible to local language needs. Reporting is generally intuitive but flexible, with many canned reports and the ability to create custom reports. The estimated annual per-agency cost of CAP60 is between \$5,500 and \$6,500 for agencies servicing roughly 7,500 households.
- **eLogic Genesis** is also a well-rounded data system with an average rating between 'Good' and 'Excellent' on the six usability criteria. Navigating the software is less intuitive than our first choice (CAP60) because of the wide variety of client assessment options available. On the plus side, these assessments and client intake are customizable and use a client portal. eLogic Genesis is built around the ROMA standards and is especially well-suited for CSBG reporting. Beyond canned reporting options and custom reports based on filters, the system also has Google Looker dashboard options that agencies can purchase at varying cost levels. eLogic Genesis integrates well with other systems, including ChildPlus and WxPro, and will set up scripts or import/export processes for working with outside systems that do not have APIs. eLogic Genesis has limited Weatherization support and recommends WxPro for full Weatherization programs. The client intake has been translated into over 80 languages and can be flexible to local language needs. The base system setup includes creating user guides, and the regular system updates include free training for system users. The estimated annual per-agency cost of eLogic Genesis is \$4,510 for agencies servicing roughly 7,500 households, *plus* a one-time data migration fee of \$5,000 - \$100,000, depending on agency size.