

STATS: Data Sharing for Continuous Improvement

Nick Ledo, BA

Management Analyst

Monterey County Department of Social Services

Executive Summary

The County of Santa Cruz Human Services Department (HSD) has created and honed a model formula to help augment strategic decision-making at the executive level. The Monterey County Department of Social Services has an opportunity to emulate the data-sharing and in-house networking afforded to Santa Cruz HSD via their STATS meeting. Adding a STATS meeting equivalent in Monterey County will help drive tactical and preemptive information-sharing for strategic planning based on communal discussion, problem-solving, and recognition.

Background

Forty-four percent of the population within the County of Monterey receives some type of government social or human services assistance. In other words, of the approximate 435,000 residents within the county borders, almost 190,000 currently receive support from the Monterey County Department of Social Services (MCDSS) to receive Medi-Cal benefits and other forms of assistance (California Department of Health Care Services, 2026). Additionally, all MCDSS programs are tied to a vast set of regulations, mandates, and/or service standards at local, State, and Federal levels. Creating and maintaining a centralized tracking mechanism for these requirements, as well as a forum to discuss and problem-solve with the broader leadership team while keeping the various Monterey County disparities in mind, will help drive stronger and more informed decision-making for MCDSS executive leadership.

Under the current structure, MCDSS is divided into branches, with deputy directors in charge of each branch and all deputies reporting upwards to the Assistant Director and Director of Social Services.

- **Community Benefits (CB) Branch** includes Medi-Cal, CalFRESH, CalWORKS and General Assistance.
- **Family and Children's Services (FCS) Branch** includes Child Protective Services, Foster Care, and Adoption.
- **CalWORKS Employment Services (CWES) Branch** includes Welfare-to-Work, CalFRESH Employment and Training, CalWORKS Child Care, and Family Stabilization.
- **Aging and Adult Services (AAS) Branch** includes In-home Supportive Services (IHSS), Adult Protective Services (APS), Area Agency on Aging (AAA), and IHSS Public Authority.
- **Administrative Services Branch** includes Fleet & Logistics, Contracts, and Finance.

The same Deputy covers CWES and AAS and the Administrative Services Branch is overseen by a Finance Manager.

MCDSS administers and facilitates over seventy different social services programs with at least fourteen program managers overseeing approximately 900 employees and support staff in multiple offices from Salinas to Seaside to King City (Monterey County Department of Social Services, n.d.). This ultimately equates to a 1:211 ratio of MCDSS staff to recipients of service in the county. MCDSS cannot effectively deliver services without some form of continuous and cooperative collaboration.

This is where the STATS concept from Santa Cruz County can play a pivotal role. Appropriately applying inspiration from the proven Santa Cruz model, along with lessons learned, feedback from Santa Cruz County subject matter experts, stakeholders, and facilitators, and overall logistics strategies has the potential to add value, efficiency and collaboration to MCDSS executive leadership. While MCDSS executive leadership currently meets on a regular basis, the set-up, structure, and purpose differ from the STATS meeting in Santa Cruz. Presently, the executive leadership team meets once per month with an additional monthly placeholder in case a second meeting is necessary in a given month. There is a standing agenda where deputies give topical updates for their respective areas. Presentations are typically scheduled first on the agenda and presenters are excused when the discussion wraps up. Additionally executive leadership huddles once per week for a quick check in on things like recruitment and Request-to-Fill efforts.

Santa Cruz County STATS

The origin of the Santa Cruz County HSD STATS meeting goes back several years prior to official implementation in 2013. In 2008, after years of preparing data manually in spreadsheet trackers, tickers, and binders, a general consensus from Santa Cruz County HSD executive leadership drove a movement towards data-driven decision support. In the following few years, HSD leadership made several organizational adjustments and prioritization strategies to continuously move in that direction. In 2010, the first Excel dashboards were created. In 2011, the organizational structure was amended to move some programmers from IT to Planning & Evaluation (P&E). In 2012, MyPortal was created for quicker access to reports and data through the department's intranet. It created the ability to accurately measure program utilization, program drivers, and historic benchmarks to evaluate program success and outcomes. This allowed HSD leadership to consolidate and quickly track mandated service standards across programs in one interface, which helped facilitate better decision-making and track progress in meeting said standards. Finally in 2013, the first iteration of the Santa Cruz County HSD STATS meeting commenced.

When STATS began meeting Santa Cruz County HSD, it was a quarterly, in-person meeting limited to just executive leadership. Attendees would flip through a twelve-to-fifteen-page data printout in real time and discussion arose from questions related to what they were reading and interpreting in the printout. If there was a specific area of concern, such as In-Home Supportive Services application decline, etc., the program analyst and possibly the program manager would join the meeting for that specific agenda item and then leave. The issue with that early model was there was not enough time for participants (and analysts, if called upon) to prepare and read the materials in advance; plus, the meeting itself took too long against competing

priorities. Over time, an official template agenda was created to help guide conversation, preparation, and time management.

As the years went on, STATS continued to evolve and improve. Eventually, surveys were added as a component to hone the efficacy of the STATS meeting by dialing in logistics such as meeting duration, recurrence, and attendee list. Once HSD found their proverbial sweet spot, the STATS surveys ultimately evolved into the formal requisition to gauge the pulse of HSD leadership and help drive relatable agenda items and topics of discussion. Currently, the STATS meeting occurs every quarter and is scheduled for two hours. Based on the limited availability of executive leadership, the meetings are typically scheduled a year in advance, while the agenda is assembled partially via survey two to three weeks before the scheduled meeting. The topic is chosen one or two months before the meeting.

When the COVID-19 pandemic hit in early 2020, nearly all in-person meetings were suspended or canceled, including STATS. Once work resumed with virtual meetings, the STATS meeting began again, adopting the new format. As an unintended consequence, the STATS meeting was no longer limited to an in-person meeting of just executive leadership. Meeting virtually meant participation could be expanded as largely as desired. Executive leadership soon extended STATS meeting invitations to all management levels within HSD, including program managers and analysts.

New modifications to the virtual agenda came by way of a section for Kudos and a breakout session to discuss a predetermined topic of interest that may or may not affect all participants at the time. Those completing the agenda survey were encouraged to recognize staff or units for extraordinary work worthy of special recognition. Additionally, break-out sessions presented the opportunity for participants to collectively discuss a hot-button item in smaller groups for a determined period of time. This allows individuals directly affected by the topic at hand to hear perspectives from different leadership levels and different program areas. Even if a topic is not directly related to a participant, they may have insight or suggestions to help work towards a solution or improvement for that particular topic. Additionally, this arrangement also creates an opportunity for broader networking amongst leadership who work in the same large department, but do not necessarily work closely on a regular basis.

Data Sharing

MCDSS is already on the way to data sharing and consolidation of reporting. For the last few years, MCDSS IT has worked with each branch to develop a standardized dashboard to view high level data for each branch and each program. The data is geared towards executive leadership, but it is available to all staff and helps paint a broad picture on the pulse of MCDSS programs,

residents served, and emerging trends. The dashboard currently displays the following information for the various branches within MCDSS:

- Community Benefits
 - Case counts for all cash aid programs
 - Demographic information
 - Benefits issued details
- Family and Children's Services
 - Referral counts and details
 - Cases opened and closed
 - Placement details
- CalWORKS Employment Services
 - Program case counts and details
 - Benefits issued
- Aging and Adult Services
 - Case counts
 - Demographic details
 - Customer service call counts
 - Dollars paid to IHSS providers

The MCDSS Dashboard has similarities to Santa Cruz County's Key Indicator System (KIS). KIS was developed around 2012 with similar strategies as MCDSS. KIS highlights high-level data across multiple programs using Visual Studio and a custom-built web application. Data is updated on a monthly basis and accessible via intranet to staff with appropriate access.

The MCDSS Dashboard and KIS provide the foundation for data sharing and baseline preparation for executive leadership in their regular meetings and discussions. As Santa Cruz County HSD also utilizes KIS for STATS, MCDSS can leverage the dashboard as baseline data sharing for a STATS meeting equivalent.

Recommendations

If MCDSS adopted components of the Santa Cruz County STATS meeting, it would bring together a larger collection of leadership points of view to address issues both isolated to single programs as well as issues that stretch across multiple programs. For example, implications of H.R. 1 was a recent agenda item in Santa Cruz County STATS. H.R. 1 affects federal funding for several programs in several areas in MCDSS, including Medi-Cal and CalFRESH in the Community Benefits Branch and IHSS in the Aging and Adult Services Branch. As IHSS benefits are directly linked to Medi-Cal eligibility, the funding challenges presented by H.R. 1 will affect the same clients served in two different branches. Through group discussions, leaders can explore potential solutions to these funding challenges expected to impact Monterey County residents who utilize these programs and services.

If kept as simple as possible, a STATS meeting equivalent can be set up bimonthly to cover the following topics, mirroring the Santa Cruz model: Director's report, branch reports, kudos, challenges. New ideas can be generated by email request or a simple survey. The MCDSS director and/or assistant director could approve the final agenda.

a more sophisticated meeting could be developed by further integrating STATS meeting strategies, such as presentations on hot-topic items, break-out sessions, and a more in-depth review and analysis of data available from the MCDSS Dashboard. Meeting logistics and continuous improvement efforts could more accurately reflect Santa Cruz County HSD by shifting that responsibility from administrative support staff to the MCDSS Information Technology (DSSIT) group. The time investment and opportunity cost for DSSIT would be relatively minimal.

The initial costs for a similar STATS meeting in Monterey County would be limited to staff time invested in administration/facilitation and participation. Specifically, support staff may spend approximately one hour per month helping to set the meeting attendance and agendas. Participants would spend approximately two hours, four to six times per year, attending the meetings. There are no tangible items and therefore no tangible cost for this effort. Should facilitation transition to DSSIT, the administration/facilitation cost would transfer to those staff involved.

The first step is getting executive leadership on board with implementing the STATS meeting. From there, the basic planning can evolve by establishing an official recurring meeting schedule and sending out general invites as far out in advance as possible. Once dates are secured, the first agenda can start to take shape. With the right people, planning, and positive approach, a

Santa Cruz County HSD STATS meeting equivalent within MCDSS can be operational within a couple months.

References

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