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Creating an Organizational Culture of Data Driven Decision Making: Lessons from Santa Cruz County

Vellore Adithi, MA, MPP

Planning Analyst

San Francisco Human Services Agency

EXECUTIVE SUMMARY

Data driven decision making is an essential feature of public agencies like the San Francisco Human Services Agency (SFHSA) and Santa Cruz Human Services Department (HSD), where agency leaders bear the weighty responsibility to effectively, efficiently, and equitably administer complex social safety net programs to a diverse clientele. This case study examines the innovative approaches Santa Cruz HSD uses to create an organizational culture of data driven decision making that reaches across its divisions, staff roles, and even out into the community. In particular, it describes the key elements of HSD's strategy — such as the Department's foundational data infrastructure, quarterly STATS meetings, and public dashboarding tools — strategies that SFHSA and other social services agencies may adopt and tailor to their contexts to bolster their own data informed practices.

Introduction

Decision makers tend to be most effective in achieving their desired outcomes when they have the information they need to accurately detect and diagnose problems, identify potential solutions, and assess the tradeoffs between these options to determine the best path forward. This is especially true for leaders at all levels of government, who are responsible for delivering essential public services that improve people's lives.

In the social services context, agency leaders must make decisions about how to effectively, efficiently, and equitably administer a complex array of social safety net programs to support the social and economic wellbeing of their clients — among whom are some of the most vulnerable members of our communities. These leaders have large quantities of program administrative and other data at their disposal, which they can leverage to make critical decisions governing their work. These decisions may range from setting strategic policy priorities, to allocating limited resources, to rigorously iterating on program design and implementation to ensure their programs achieve intended impacts. Further, when social services agency leaders share information about their decisions and the facts that guided their decision making, they can improve transparency with and accountability to their stakeholders within and outside their organization.

Having long recognized the value of data driven decision making in carrying out its mission, the San Francisco Human Services Agency (SFHSA) has a well-established infrastructure for data collection, management, analysis, discussion, and response to support decision makers across the agency. One of the agency's foundational resources for advancing data informed practice is SFHSA Planning. The Planning unit is a centralized team that provides a range of analytical support to agency and program leadership, including activities such as strategic planning, project management, and research, data analysis, and evaluation. Among other functions, Planning analysts are responsible for designing, developing, and disseminating a variety of products that support data driven decision making and continuous improvement at SFHSA. These deliverables include tools such as automated program dashboards, ad hoc analyses, and public-facing reports that use data and narrative to summarize agency priorities, activities, and outcomes.

SFHSA leadership and Planning analysts are committed to continuous learning about promising practices that can help to strengthen and expand data driven decision making throughout the agency. To that end, SFHSA undertook this case study to examine the strategies used by the Santa Cruz County Human Services Department (HSD) to cultivate an organizational culture of data informed practice — one that cuts horizontally across programmatic silos, vertically across staff roles in the leadership hierarchy, and even out beyond the department to engage external stakeholders.

This case study begins by providing information about the critical data infrastructure underlying Santa Cruz HSD's organizational culture. It then explores how HSD deploys its quarterly STATS meetings and public dashboarding tools to create a shared culture of data driven decision making within and outside the department. Finally, this case study offers recommendations for SFHSA to bolster its own culture of data informed practice.

Santa Cruz County's Approach To Data Driven Decision Making

Over the last twenty years, HSD has made significant organizational investments to build a culture of data driven decision making, focused on performance management and continuous quality improvement across its various programs. The Department's centralized Planning & Evaluation division serves as the infrastructural backbone for operationalizing HSD's commitment to data informed practice. Planning & Evaluation was established in 2007 to help the Department's programs develop meaningful operational insights from their administrative data, and to use those insights to inform continuous improvement in the design and delivery of their services.

Within Planning & Evaluation, the Business Analytics (BA) unit plays a lead role in fostering data driven decision making throughout HSD. The unit is staffed by 8 full-time employees, most of whom serve as either Program Analysts or Programmers/Developers. BA Program Analysts provide HSD programs with tailored data consultation, analysis, and reporting to support their operations. They have both technical skills to perform complex quantitative data analysis and robust subject matter expertise in the programs they support. This unique blend of technical capacity and operational insight enables them to put data in programmatic context, structuring reports and visualizations in ways that are most meaningful for program end users. BA Programmers function as information technology specialists, with expertise in areas such as database design and management. They help extract, transform, and load program administrative data from HSD's more than 10 major data systems into customized web applications that support automated reporting.

Laying the Foundations for a Data Driven Organizational Culture

In an iterative process of collaboration with HSD program leadership and analysts over many years, BA Program Analysts and Programmers have laid essential technical groundwork for the robust culture of data driven decision making that the Department enjoys today. The foundations for this culture take the form of two major reporting tools that provide program staff with both digestible summary insights and more detailed operational data on program trends and performance. Each of these tools is described in more detail below.

The Key Indicator System

The first of these tools is HSD's Key Indicator System, a custom web application that centralizes, integrates, and automates longitudinal reporting on key performance metrics meaningful to each program. The Key Indicator System uses simple visualizations, such as line charts, to provide snapshots of program performance trends over time (e.g., monthly). Further, each metric is assigned a performance target based on factors like regulatory requirements, broader industry best practices, and/or historical baseline data on program performance. Performance outcomes relative to this target are then visualized using an easy-to-understand color-coding framework: performance at or above the target is represented in green; performance that is slightly below target is represented in yellow; and performance that is significantly below target is represented in red. This elegantly pared-down approach to summary data visualization makes it easy for users to understand program performance at a glance.

The tool also offers advanced users the option to understand how relevant program trends or “data drivers” may contribute to these outcomes. For instance, users can examine how Family and Children’s Services referral trends contribute to the program’s performance with respect to overall response timeliness. Key Indicator System users can therefore see not only what performance outcomes look like over time, but also explore possible explanations for why and how the program achieved those outcomes. These insights can then help shape strategies the program might adopt to maintain or improve outcomes as needed.

MyPortal Reports

The second of these tools is the robust library of standing data reports on program trends and operational concerns available to staff via the HSD MyPortal intranet platform. BA staff partner closely with programs to design, implement, and refine these customized reports based on areas of interest to each program. These reports directly query the Department’s various data systems via SQL server, a critical aspect of automation that enables program staff to extract near real-time data relevant to their operations. Given their highly tailored nature, the topics, function, audiences, and complexity of reports in the MyPortal library can vary widely. Some examples of these reports are provided below to illustrate this range:

- **IHSS Assessment Compliance report**, which IHSS workers and supervisors can use to track at the case level what required assessments have been completed on time and which are still pending or overdue.
- **Applications Summary report**, which provides case level details on benefits applications including the status as well as aggregate information on applications submitted by community based organizations..
- **Newly Homeless report**, which provides data on individuals receiving homelessness services, whether they are new or returning to the system and assessment information.

Together, the Key Indicator System and MyPortal reports serve to package highly complex program administrative data in easily accessible and digestible formats that help keep HSD program leadership and staff well-informed about day-to-day operational concerns as well as higher-level trends in program performance. These data products are important foundational resources for the department, which deploys and builds on them strategically to cultivate an organizational culture of data driven decision making. These strategies are described in the following sections.

Stats Meetings: Building A Shared Culture Of Data Driven Decision Making At Hsd By Breaking Down Program Silos And Engaging Staff At Many Levels

One of the main strategies HSD uses to build a shared, organization-wide culture of data driven decision making and continuous quality improvement is its quarterly STATS meeting. This cross-divisional meeting brings together more than 60 employees across the department’s executive leadership, division directors, and program managers to review and discuss departmental data on shared topics of interest. Coordinated and facilitated by the Planning & Evaluation unit, this two-hour virtual meeting hosted on Microsoft Teams offers HSD staff a forum for information exchange, shared learning, and collaboration.

First launched in 2012, the STATS meeting was originally smaller, and primarily for division directors to learn about notable program trends and initiatives within a single division. On a rotating schedule, the presenting division's director and program managers shared data and program updates to give meeting attendees visibility into division operations outside their usual scope of work. Following the presentation, attendees had the opportunity to pose questions about the material presented, reflect on program trends and outcomes both within the division and a broader departmental context, and identify potential opportunities for cross-divisional collaboration.

Following the outbreak of the COVID-19 pandemic in 2020, HSD leadership and the Planning & Evaluation unit restructured and broadened the scope of the STATS meeting to reflect its current format. Its leaders recognized that taking a more thematic, cross-divisional approach to these data presentations and discussions — rather than diving deep on the work of a single division at a time — could better support attendees to identify common patterns across programmatic silos, and to develop innovative collaborations to address shared priorities. They also realized that, with the pandemic-era shift to virtual meeting formats, the STATS meeting could easily be expanded to include a broader and more diverse attendance reflecting staff across all levels and HSD sites throughout the county. This shift would allow staff to build greater shared awareness of key topics and trends at HSD, and in turn to benefit from the added perspectives of the meeting's newer attendees. Participants in the STATS meeting, new and old, regard these changes as extremely valuable ones that have served to reinforce the meeting's role as a “critical component of HSD's overall approach to data driven management to ensure operational excellence.”

Preparing for and Facilitating the STATS Meeting

Planning & Evaluation staff are responsible for coordinating, preparing for, and facilitating the STATS meeting. In particular, BA Program Analysts collaborate closely with leadership and analysts in each division to prepare the data analysis and other content to be presented at the meeting. They compile this information in a consolidated slide deck, which they review via screenshare during the STATS meeting, and also circulate after the meeting via MyPortal, where it is accessible not only to meeting attendees, but to all HSD employees.

In its current format, the typical two-hour STATS meeting agenda includes:

- **Policy updates** from the HSD Director
- **Division and program highlights, challenges, and kudos** from Division Directors
- **Cross-divisional topic overview and data** from the Planning & Evaluation Director
- **Division-level topic insights and reflections** from Division Directors
- **Breakout discussions**, with about 4-5 people randomly assigned to each discussion
- **Large group discussion**, facilitated by the Planning & Evaluation Director

- **Conclusion**, including a link to an online post-meeting survey to gather additional reflections on the topic, any relevant feedback, and suggested future topics.

Depending on the topic of discussion, BA Program Analysts are often able to leverage existing data analysis pertaining to caseload trends, client demographics, and program outcomes from the Key Indicator System and/or MyPortal to develop the cross-divisional data snapshots presented at each meeting. In some cases, particularly deep dives into topics for which reporting is not currently routinized, they may develop analyses ad hoc. In addition to preparing data analysis and corresponding visualizations to include in the meeting slide deck, BA Program Analysts also solicit and compile the general highlights, challenges, and kudos that divisions and programs share early in the meeting, as well as the division-level insights and reflections on the topic that serve to put the data in real-world, programmatic contexts. According to the Planning & Evaluation Director, the resource investment needed to successfully prepare for each STATS meeting is a significant one: collectively, BA and program staff spend anywhere between 20-40 hours on this task.

Breaking Down Program Silos

One of the notable features of the STATS meeting is its cross-divisional approach, which helps to cultivate a shared culture of data informed practice that traverses traditional programmatic boundaries. HSD breaks down program silos not only by inviting staff from across the department's divisions and programs to attend, but also by selecting topics of shared interest and structuring discussion to tease out similarities and differences in how HSD programs experience common issues. Recent meeting topics include, for example: immigrant client engagement in HSD services; equity analysis of department staffing and demographic representation; and a re-orientation to the HSD Housing for Health division, with a focus on identifying potential opportunities for cross-division collaboration.

Planning & Evaluation staff select these topics with prior input from programs, and use this input, their unique insight into common operational concerns and data across divisions, and strategic discussion prompts to help ensure that STATS meeting topics feel relevant and timely for each division's attendees. They also gather feedback after each meeting using a brief online survey to assess its effectiveness, and to inform potential adjustments for future meetings.

The STATS meeting contributes so meaningfully to HSD's cross-divisional culture of data driven decision making because the department's leadership has set the right tone for it to do so: HSD staff regard data on program performance in particular as a supportive tool for learning and continuous improvement — not as a means of shaming or punishing underperforming programs. This framing is especially important when data and discussion is structured to invite comparisons across divisions and programs. For example, at two back-to-back STATS meetings focused on demographic representational trends in HSD staffing, personnel data revealed that people of color are more well-represented in some divisions than in others. Further, it showed that these representational disparities were significantly more severe in some divisions at the management level.

Understanding this data as a way to support continuous improvement, discussion at these meetings prompted participants not only to celebrate divisions with more equitable representation, but also to identify notable equity gaps, likely root causes for inequitable

outcomes, and potential solutions to address these inequities. Ultimately, discussion at STATS meetings does not shy away from acknowledging and responding to less-than-desirable performance within or across divisions. As one division director succinctly put it: “If we only highlight successes, we’re not actually committed to transformational work.”

Another factor in the success of the STATS meeting in breaking down program silos is the shared understanding that these meetings can only “prime the pump” for continuous improvement, and that divisions must work collaboratively to act on what they learned after these meetings. For example, the STATS meeting data on department staffing equity served as a point of entry for the Family and Children’s Services division to more deeply examine why white social workers were overrepresented among their staff. In partnership with Planning & Evaluation and the HSD Personnel unit, the division identified racial disparities in their recruitment, hiring, and promotion processes for social work roles. To address these issues, Family and Children’s Services implemented several strategies, including focused outreach to job seekers of color, reclassification of select social work positions to remove educational barriers to employment, and improved procedures for internal promotion. Since then, the division has already seen a favorable shift in the demographics of their social work staff.

Engaging Staff at Many Levels

Another of the notable features of the STATS meeting is its inclusion of participants who occupy roles across various levels of the organization, which helps to build a culture of data informed practice along the HSD leadership ladder. While regular meeting attendees are primarily staff in management roles throughout the department, for whom decision making about program administration is an essential part of their day-to-day work, STATS meetings are also sometimes attended by staff in supervisory, analyst, and even frontline roles depending on the meeting topic. Not only can these staff benefit from the learning opportunities available through these meetings, but they can contribute valuable insights that help put data in programmatic context and enhance decision making by leaders.

This democratization of the STATS meeting to include all director and manager level staff hinges in large part on the virtual meeting format, which enables a larger number of employees across different roles at HSD to participate in the meeting. The flexibility of this format allows diverse staff to participate in these meetings, overcoming the logistical constraints that tend to characterize in-person meetings, which are less able to accommodate different staffing models, schedules, and work sites that vary systematically by role.

This more inclusive approach is also made possible by HSD’s commitment to data transparency and work to enhance data literacy at all levels of the department. As noted earlier, for example, following each STATS meeting, Planning & Evaluation staff post the meeting materials to MyPortal, where they are available as a standing resource for meeting attendees and other interested employees. Additionally, Planning & Evaluation staff offer support for data skill development among HSD managers and other staff, including an overview of STATS as part of new staff orientation. They also provide trainings that help equip staff across HSD divisions and roles to engage more effectively with program data, including an orientation to MyPortal reports and other departmental data products, as well as a “masterclass” on data for staff in both analyst and non-analyst roles.

HSD Community Dashboard: Inviting External Stakeholders To Participate In A Shared Culture Of Data Driven Decision Making

Another notable strategy HSD uses to bolster its organizational culture of data driven decision making is its recently launched Community Dashboard. Published online in March 2025, the [HSD Community Dashboard](#) is the latest example of the department's efforts to use data to drive decision making and inform continuous improvement. HSD's invitation to public engagement with the department's data is stated clearly on the dashboard homepage: "We hope our data dashboards provide you with an informative glimpse into our performance trends, successes, and challenges."

The department launched this dashboard to make HSD program data more accessible to the public, in both format and structure. Although Planning & Evaluation staff have a long-standing practice of preparing and publishing the HSD Annual Report, which summarizes program data and narrative highlights from the prior year, they recognized that this 30-50 page PDF document was not the optimal format to support public engagement with department data. This internal assessment was echoed by the Santa Cruz County Civil Grand Jury, which found in its review of HSD that external stakeholders sometimes had difficulty locating and understanding critical information about local social services programs.

To address these concerns, Planning & Evaluation BA staff designed the HSD Community Dashboard — which is a series of program dashboards organized by broad themes grouping services with similar goals such as "Employment and Economic Security" and "Health and Well-Being." Each section of the dashboard focuses on a program within the selected theme, describes the program in accessible terms, and structures data on key program trends and performance. For example, users can find information about CalFresh, described in simple terms as "assistance to buy nutritious food" under the "Health and Well-Being" section of the dashboard. The dashboard includes clickable navigation buttons on the left side of the page so users can select which CalFresh metrics to view.

These navigation buttons appear across all of the published dashboards, where data are available. They reflect the questions posed by the Results Based Accountability framework, which help to break the complexities of program performance into more digestible, easy-to-understand component parts (Friedman, 2015). These questions ask:

- **How many?** Metrics that answer this question describe the caseload volume for a program, such as how many individuals or households receive CalFresh.
- **Who?** Metrics that answer this question provide a demographic snapshot of the people served by a program, like the ethnicity, language, gender, age, and location of CalFresh enrollees.
- **How Well?** Metrics that answer this question provide insight into the quality of services, such as the percentage of CalFresh applications processed on time.
- **Better Off?** Metrics that answer this question illustrate program outcomes, like the CalFresh participation rate (which evaluates service penetration in the estimated eligible population), and total CalFresh benefits issued (which quantifies public assistance dollars awarded to CalFresh recipients).

Planning & Evaluation staff use Microsoft Power BI to visualize, publish, and refresh annualized program data from the last five fiscal years in the HSD Community Dashboard. In most instances, they leveraged the department's existing data and reporting infrastructure, including their increasingly sophisticated automated processes for data modeling, integration, analysis, visualization, and refresh, to develop these dashboards.

Inviting External Stakeholders to the Table

As described above, the HSD Community Dashboard represents an important step forward in the department's culture of data informed practice — one that invites stakeholders ranging from the Santa Cruz County Board of Supervisors, to HSD's community-based partners, to its clients and potential consumers, and to members of the general public — to meaningfully engage with HSD's program data and formulate their own questions, concerns, and solutions to the patterns that emerge.

In addition to basic user friendliness of this interactive online tool, and the digestible fashion in which program data is presented, the HSD Community Dashboard includes several other notable features that enhance its accessibility to the public. These features include: a summary blurb accompanying each dashboard about the division that oversees a given program and link to learn more about and/or apply for services; explanatory data notes to contextualize select visualizations as needed; a published document detailing [Dashboard Methodological Notes](#) on the dashboard homepage; and contact information (HSDdata@santacruzcountyca.gov) for users seeking additional information or support.

Recommendations For San Francisco

SFHSA has a great deal in common with the Santa Cruz County HSD: the existence of a centralized team of Planning staff with both the technical skills and knowledge of programs to effectively provide complex analytical support to programs; the use of a cloud-based business intelligence platform designed to warehouse data across a large number of program databases and support automation of routine tasks like data modeling, integration, and analysis; long-standing practices for using data to inform continuous quality improvement; etc. These parallel structures put SFHSA in a strong position to adapt and adopt the promising practices in use at HSD to build a more robust organizational culture of data informed decision making in its own context. Recommendations to guide this effort are provided below.

- **Increase opportunities for interdepartmental and/or cross-programmatic information exchange and collaboration on topics of shared interest.** SFHSA should consider revamping and reinstating its own STATS meeting, which was once structured much like the original STATS meeting at HSD and permanently discontinued during the COVID-19 pandemic due to the emergence of other agency priorities. Agency leadership could potentially leverage the monthly Management Debrief meeting or identify another time to host a quarterly STATS meeting for all ~80 management level staff across the agency.

Alternatively, the Department of Benefits and Family Support and Department of Disability and Aging Services might instead host department-specific STATS meetings, allowing for focused discussion while still breaking down program silos within each

department. It bears noting that SFHSA Planning would likely play a key role in preparing analysis and other materials for STATS meetings, as they have in the past. While Planning analysts may be able to leverage existing analysis to prepare for STATS in most cases, agency and Planning leadership should carefully consider the team's capacity to take on this task. Promising topics for STATS meetings include immigrant client engagement in SFHSA services and results from the 2024 SFHSA All-Staff Survey.

- **Increase opportunities for staff at all levels of the leadership hierarchy to engage with program data and inform continuous improvement.** SFHSA should identify strategic initiatives that are well-suited to employee engagement across diverse staff roles, including supervisors, analysts, and frontline staff where possible. Supporting staff to engage productively with program data and continuous quality improvement processes, particularly at a large scale, can be extremely resource intensive. The agency may benefit from localizing these efforts within individual programs, where it may be easier to identify topics that feel relevant to staff, provide coaching to interpret unfamiliar program data, and support discussion so staff feel well-equipped to share their insights.

Although SFHSA's efforts to implement Phase 2 of the citywide Racial Equity Action Plan have since evolved, the agency's original plan offers one promising template for how this kind of staff engagement could be carried out. Under this model, SFHSA Planning developed and vetted program data analysis with division and program directors, identified priority areas for further exploration, and planned to facilitate a series of guided discussions reflecting on trends in these priority areas each with program managers, supervisors, and frontline staff — all with the aim of developing a data informed action plan to address the key equity concerns identified in that program. SFHSA should consider whether it may be feasible to use this kind of iterative approach to information sharing and gathering with staff at various levels of the leadership ladder to inform standalone continuous improvement initiatives, or any similar future agency-wide efforts.

- **Make summary SFHSA program data more readily accessible and user friendly for external audiences, including key stakeholders and the general public.** SFHSA should build on its existing repository of data analysis on program trends, client demographics, and program performance to develop and launch a public-facing summary dashboard similar to the HSD Community Dashboard. The agency is fortunate to have extensive existing data infrastructure SFHSA Planning can leverage in support of this undertaking, including standing semi-annual performance measure reporting to the San Francisco Controller's Office, internal program dashboards across most agency programs, and annual publications summarizing the performance of community-based aging and disability programs funded by the Dignity Fund. Given SFHSA's prominent role as San Francisco's anchor social services provider, as well as Mayor Daniel Lurie's increased attention to data on program performance, it is more important than ever for the agency to make summary program data available to its external stakeholders.

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