Introduction to the Organizational Analytic Capability Self-Assessment

April 16, 2025

Acknowledgements and Disclaimer

CCBHC-E
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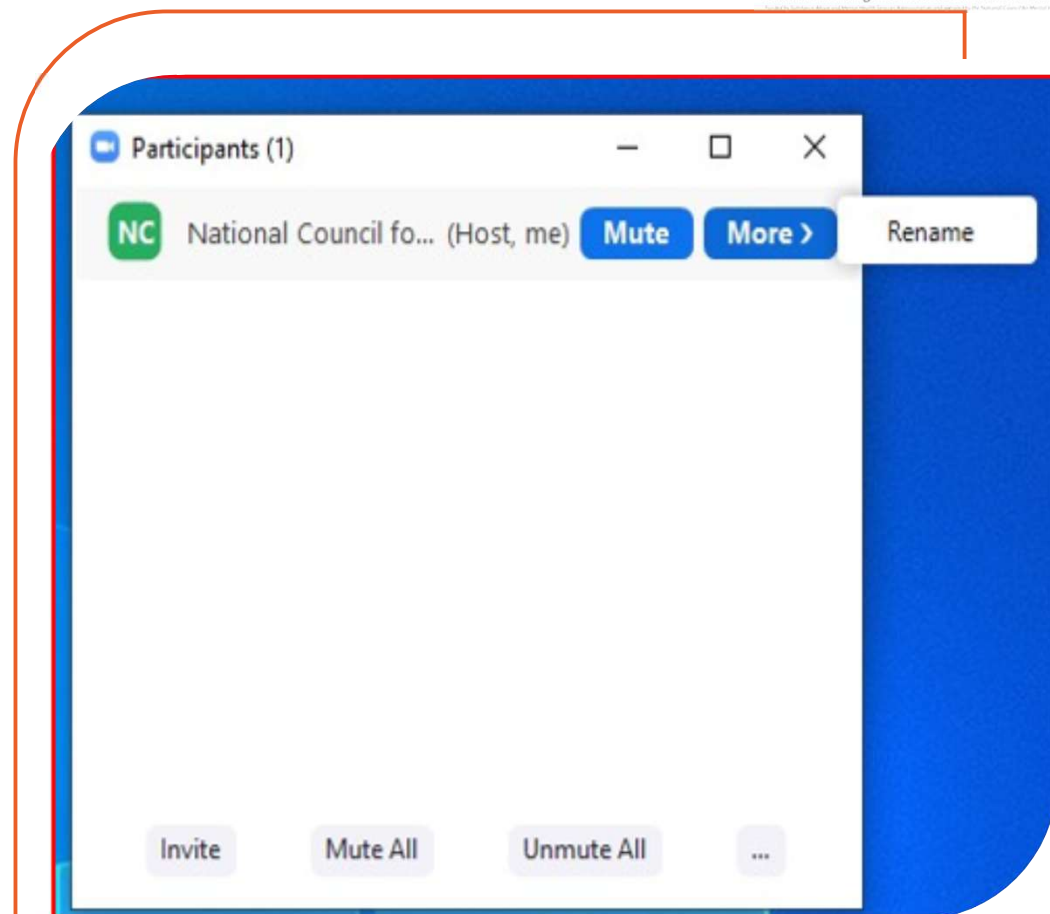
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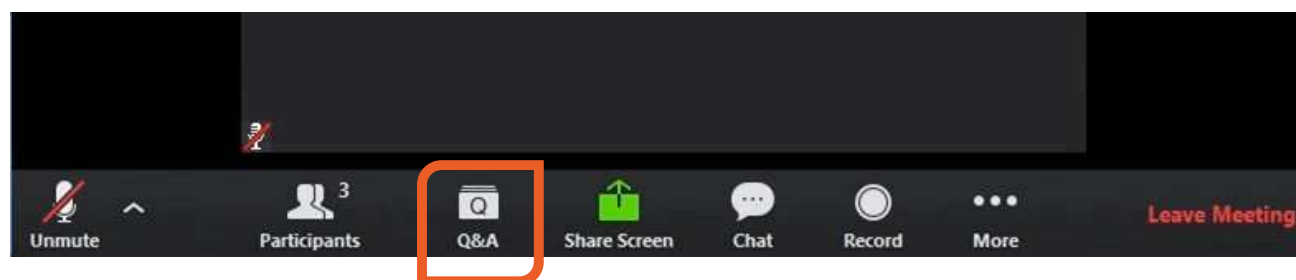
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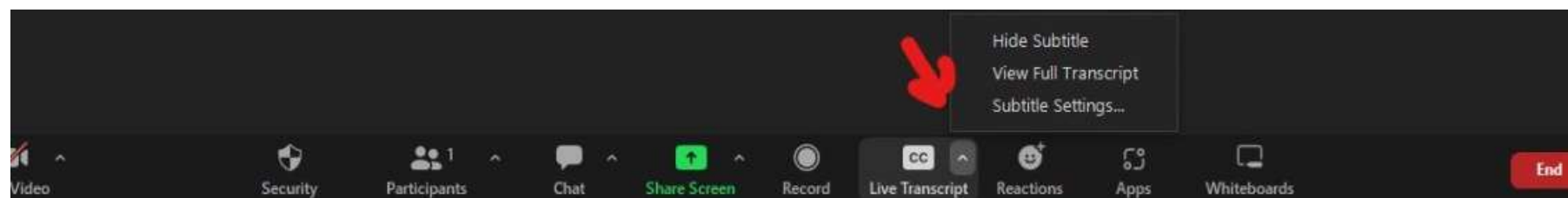
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Agenda

- Understand how the basics of the organizational analytic capability framework and how it supports CCBHC requirements and quality improvement goals through real-world examples

- Learn about how the self-assessment tool can help evaluate your current data capabilities and identify priority areas for enhancement

- Understand how enhanced data capabilities can help improve CCBHC quality metrics, operational efficiency, and financial sustainability

- Learn about follow-up technical assistance opportunities for guided support in using the tool

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Top-of-Mind Reflection

A. "To what degree does my organization have the **right data**, **at the right time**, **presented in the right way** to optimize decision-making?"

B. "To what degree does my organization struggle with integrating data from different parts of our organization to optimize decision-making?"

Consider These Prompts From Different Perspectives of Your Organization

Key Terms

Analytics: Activities examining information to find patterns to make inferences to make better decisions

- Data collection and integration
- Statistical analysis and modeling
- Data visualization and reporting

Information
aka Data

- Clinical e.g., EHR and HIE
- Administrative
- Financial
- Operational
- Client Survey
- Staff Survey
- Health Monitoring e.g., client wearables

What does a modern CCBHC need to do with information?

- *Enhanced Operational Efficiency*
- *Quality Measurement & Performance/Outcome Improvement*
- *Treatment Effectiveness*
- *Regulatory Compliance*
- *Support Alternative Payment Models e.g., Prospective Payment Systems (PPS)*
  - Workforce Management and Utilization Management
  - Population Health Management (including risk stratification)
  - Cost Prediction
  - Value-based contracting
- *Other Executive-level Data-Driven Decision-Making*

Which ones are you able to do?

NCSS experienced some significant symptoms of information challenges.

- Data existed in multiple locations and sources not effectively integrated
- Nonbillable events not captured consistently
- Inconsistent process for housing and accessing data across different IT teams
- Technology resistance
  - Under-utilization of available resources
  - Varying range of competency with using data to inform work
  - Staff see data requirements as administrative burden – focus on the 'clinical work'
- Limited bandwidth for data analytics teams
  - Focus on reacting to funding requirements
- Interoperability challenges
- Lack of strategic alignment

What is organizational analytic capability?

Analytical Capability	The level of sophistication and effectiveness with which an organization collects, manages, analyzes, and applies data to make decisions.

Organization Analytic Capability Attributes

Data	Analytic Opportunities	Analytic Techniques
People	Technology	Culture

Organization Analytic Capability Attribute Domains

Data

- Data Management
- Data Operations
- Data Quality

Analytic Opportunities

- Develop Opportunities
- Manage Projects
- Execute Solution

Analytic Techniques

- Data Preparation and Manipulation
- Analytic Tradecraft

People

- Talent Definition
- Talent Recruitment
- Talent Placement
- Talent Development

Technology

- Planning & Development
- Infrastructure
- Data Management
- Analytic Services and Integration
- Human Insights & Interactions

Culture

- Organizational Enablers
- Engagement

General Levels of Organizational Analytic Capability

Level 1: Initial

- Capability not addressed, data work is primarily reactive

Level 2: Defined

- Capability addressed in an ad-hoc manner and mostly reactive

Level 3: Partially Managed

- Capability normally addressed with standardization

Level 4: Managed

- Capability consistently addressed and governed

Level 5: Optimizing

- Capability reviewed regularly to enable continuous capability improvement

How can one problem reflect many needs?

Example

Issue: A Medicaid authority indicated a CCBHC failed to meet a value-based payment benchmark, i.e., SDOH screening.

Clinical Team Belief
- Confident screenings occurred:
- Routine SDOH assessments by health & wellness staff
- Strong linkages to primary care
- Verbal confirmation from staff

What led to this issue?
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Organization Analytic Capability Attribute Domains

Data

Data Operations: Data Collection
The data collection method was not standardized
Data Quality: Data Quality Assurance
Data quality checks were not routinely completed

Analytic Opportunities

Manage Projects: Project Validation
The analytic team failed to validate that the analytic project was yielding valid results properly

Analytic Techniques

Data Preparation and Manipulation: Structured vs Unstructured Data
The organization was not equipped to leverage structured and unstructured data

People

Talent Definition: Role Definition
There seems to be confusion about who is responsible for ensuring proper documentation and reporting.

Technology

Data Management: Data Repository
Multiple (unintegrated) systems (EHR, spreadsheets) suggest a lack of a unified
data repository or mapping.

Culture

Organizational Enablers: Policy and Procedures
There appears to be a communication gap between clinical staff, leadership, and data analysts.

Data Needs Check-in

What systems of information challenges is your organization experiencing?

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Check-in: How do you see yourself?

Role	Description
Innovator	I champion analytic capability at my organization and promote new ways of using information.
Advocate	I educate and remind direct care staff and administrators about the importance of data/information to improve clinical or organizational clinical outcomes.
Assessor	I assess my organization's ability to develop analytic capability formally or informally.
Builder	I implement new ways and standards for making good use of information in the organization.
Collaborator	I support others in the efforts to maximize awareness and engagement in implementing good use of information.

OACM and CCBHC

Criteria: Data Collection, Reporting, and Tracking (Requirement 5.A)

OACM Support: The OACM emphasizes foundational elements like data quality, governance, lifecycle management, and access policies to ensure that data used for quality reporting is complete, consistent, and valid.

Example: A CCBHC uses OACM its ability to reliably collect, analyze and report screening and follow-up data for depression (e.g., PHQ-9 scores), enabling accurate reporting on measures like DEP-REM-6 and CDF-AD/CH, as required by SAMHSA

Criteria: Continuous Quality Improvement Plan (Requirement 5.B)

OACM Support: The model provides a systematic self-assessment method to identify and prioritize areas of analytic weakness and plan for sustainable improvement.

Example: A CCBHC has lots of data but doesn't trust the results. The OACM helps the organization determine whether these challenges may relate to its data quality framework, data quality assurance, strategic data management, or strategy.

OACM and CCBHC

Criteria: Care Coordination (Program Requirement 3)

OACM Support: OACM includes subcategories on data integration and technology interfaces, critical for care coordination across physical health, behavioral health, and social services.

Example: A CCBHC with multiple DCOs and care coordination agreements but is still relying on faxes and manual file uploads between EHRs rather than using API management and shared data standards.

Analytics Capability Helps Streamline CCBHC Reporting & Service Delivery

| Select Benefits of OAC	Streamlines Reporting	Improves Service Delivery
More Automated Data	Reduces manual work, real-time measure reporting	Frees staff for client care, reduces delays
Useful Dashboards	Promotes centralizing reporting with clear use cases that can be efficiently shared with key stakeholders	Supports proactive team decision-making
More Real-Time Monitoring	Early alerts for performance gaps (e.g., quality care metrics)	Greater responsiveness to clinical and operational needs that need improvement.
Routine Risk Stratification	The ability to communicate the levels of need across your population and the care they receive	Better ensure whether people are getting the intended service type and intensity
Better Integrated Coordination	Improved data sharing with external partners	Fewer gaps in care transitions and quicker access to care

Are you ready for a comprehensive analytics assessment?

Clinical Process	OACM Process
Step 1: Brief Screening Tool Identifies whether a client may have a concern (e.g., APA-Level 1 Assessment for 12 psychiatric domains, PHQ-2 for depression). It's quick, broad, and not diagnostic.	**OACM Screener** Identifies whether the organization is ready for an analytics assessment. It's a brief check for motivation, gaps, and resource commitment.
Step 2: Full Clinical Assessment Conducted when the screening is positive or concerns are identified. Uses structured tools and clinical interviews to define specific diagnoses and needs.	**OACM Full Assessment** Used when the screener shows readiness. It is a structured, detailed evaluation of six analytics capability domains to guide a targeted improvement plan.

NCSS

- Highly motivated to improve our structure and systems for data analytics
- Headed toward CCBHC so hoping this will set us up for success
- Have resources and expertise to complete assessment
- Overall readiness - **Moexpertise to complete <ins>Moderate to High Readiness for Change</ins>**

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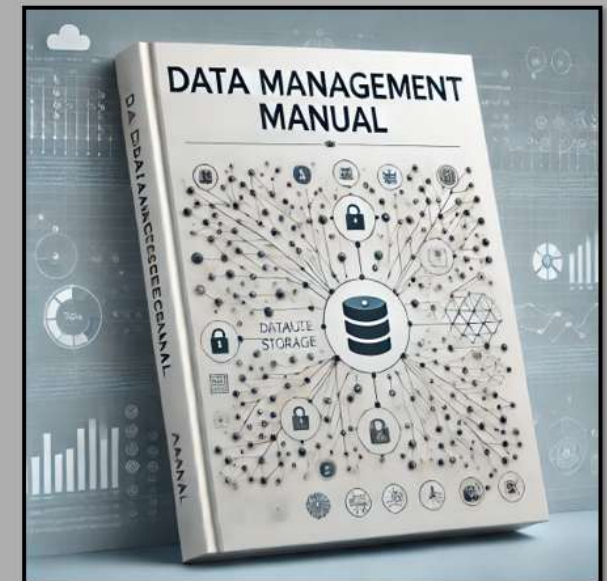
Getting Ready

Assess your Organization's Readiness

- Pre-Assessment
- Team Formation
- Orientation
- Rating Process
- Implementation Planning

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Screening for Organizational Readiness to Change: Analytics Capability.

Self-Assessment Screener

- To what degree do you know your analytic gaps, i.e., getting the *right data* at the *right time* and in the *right way* to make decisions?

- To what degree is your leadership motivated to make advancements in analytic capability?

- To what degree is leadership committed to investing resources to conduct a self-assessment?

- To what degree does the organization place value in addressing its analytic capability?

Getting Ready

Assess your Organization's Readiness

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NCSS' pre-assessment phase experience

Participants	Group Dynamics	Quick Timeline
Made sure to have folks in the room representing multiple areas of expertise –including clinical voice. Executive level ownership – made sure C-suite and other directors participated	Kept group relatively small Clearly identified everyone's role Used charter and ground rules, mapped out expectations, created binder	Snapshot in time Grant requirements Excitement amongst participants

NCSS' Assessment phase experience.

Structure	Communication	Raters	Resources
• Stuck to the timeline and used sprint model. • Allowed for quick wins along the way.	• Meetings scheduled with specific people to do each rating. • Reminders of homework • Used TEAMS for communication	• People attended the sessions they were assigned to. • Amanda and Trisha only raters for all sections	• "Phoned a friend" a few times – Wellbeing in Action consultants helped use with a few of the areas we anticipated being more challenging to work through.

Let's Review the Levels

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Data Standards and Procedures

Level	Score	CCBHC Example
Level 1: Initial	No formal data quality framework exists, or it is only loosely defined.	The CCBHC lacks a formal data quality framework. Data quality issues are addressed on an ad hoc basis, leading to inconsistencies and potential impacts on patient/client care.
Level 2: Defined	A data quality framework is defined and supported by documented policies and procedures, but these are inconsistently applied across different departments.	A data quality framework is in place, but its application is inconsistent. For example, data quality checks are performed irregularly, leading to variations in data accuracy and completeness.
Level 3: Partially Managed	• A standardized data quality framework is established across the organization, with general adherence to policies and procedures. • Regular reviews ensure the framework supports patient/client care and operational efficiency.	The clinic establishes a standardized data quality framework, including regular data quality checks and reviews. These practices ensure data supports patient/client care and operational efficiency.
Level 4: Managed	• A comprehensive data quality framework is enforced across the organization. • Adherence to policies and procedures is monitored and measured, ensuring data quality supports strategic goals and compliance.	A comprehensive data quality framework is implemented across the CCBHC. Regular audits and monitoring ensure adherence to data quality policies and procedures, supporting the clinic's strategic goals.
Level 5: Optimizing	• The data quality framework is continuously reviewed and refined. • Performance metrics and data quality improvement plans are integrated into the organization's strategic goals, ensuring ongoing enhancement of data quality.	The clinic continuously reviews and updates its data quality framework. Regular stakeholder meetings and feedback sessions ensure that data quality improvement plans are effective and aligned with strategic goals. Advanced data quality tools are used to enhance data accuracy and completeness.

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NCSS Results

Strengths

- Advance capabilities in People attribute
- Level 5 for Data Repository – advanced storage and management
- Solid Mid Level for Opportunity Identification and Selection, Communication, Use of Structured data

Areas to Grow

- Fragmented data systems
- Lacks centralized mapping and standardization across technology teams
- System Interoperability challenges
- Cultural perceptions of data requirements as admin burden
- Approach to data as an agency in general is reactive

Focus and Priority Areas

- Move agency to a proactive approach to data
- Establish comprehensive data management strategies
- Implementation of robust quality assurance
- Improve system integration capabilities
- Develop more strategic approach to analytic projects

NCSS – The various views of the report

CULTURE								
Subcategory	Advancement Objectives	SCORE	Change Types	Steward	Phase 1	Phase 2	Phase 3	
Engagement								
Communications	Establish a formal communication strategy that effectively shares and communicating key data analysis results to all staff, e.g., agencywide memos and briefs	Current ●●●○○ Target ●●●●○	Process Design	Dani				
Community	1. Expand the Outcomes Committee to include more staff or clients Quick Win! 2. Establish more direct communication from Outcomes Committee with all staff	Current ●●●○○ Target ●●●●○	Process Redesign	Amanda and Directors				

Analytic Techniques

In their Analytic Techniques assessment, NCSS demonstrated varying maturity levels across subcategories, ranging from level 1 to 3. The organization showed relatively higher capability (level 3) in:
- Organized Structured Data
- Data Visualization
- Reporting and Distribution

Growth areas with lower capability were:
- Data Analysis (level 2), and
- Organize Unstructured Data (level 1).

NCSS' advancement objectives clearly contrasted their capabilities with structured versus unstructured data. While the organization demonstrated competency in handling structured data and creating visualizations, the rating team identified a significant need to develop abilities in analyzing unstructured data, such as progress notes. Their objectives focused on expanding the use of analytic tools across the agency, implementing utilization management analytics, evaluating the effectiveness of their Key Performance Indicators (KPIs) platform, and better aligning their reporting with business goals and strategic planning.

Attribute	Subcategory	NCSS Level
Technology	Data Repository	5
Technology	Tools and Software	2
Technology	Interfaces	2
Analytic Techniques	Reporting and Distribution	3

NCSS - Results, post-assessment planning, and action steps

Key Takeaways from the experience

- Reviewed scores with full group; prioritizing exercise
- Developed action plan and roadmap in partnership with Wellbeing-in-Action.
  - Defined ideal and realistic
- Internal work continues, we are a work in progress

NCSS – post-assessment planning and action steps

NCSS - Testimonial

"When I first heard of this, I was a little scared and even joked with Kim about it uncovering the bad job I am doing, but this process has fun and the exact opposite it highlighted what we are doing well but also what we need to do to grow and I am excited for our final meeting so that we can get started as an agency.

This assessment has really made me start thinking more about our requests that we get, best way to deliver, the future of my team and data in general at the agency. Actually, thinking about it now not doing this assessment is scarier because you just helped us prioritize and lay out our strategic plan for our data analytics here as an agency and doing this without the assessment on our own would have left gaps and holes. This process was way more proactive where without it we would have been doing this process reactively and not as well. I really appreciated this process, and it has been a lot of fun."

What's next?

• Complete the OACM screener.

• Share the OACM handbook

• Consider application to the four-session OACM orientation and self-assessment learning community.

Thank You

Support Series

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