

Fred Buhr

DIVISION OF FAMILY SERVICES

TO: William Lentz, Director
 Bureau of Management & Evaluation
 Services

FROM: Peter Albert
 Social Service Revision Committee

DATE: August 14, 1972

RE: Committee Recommendations for Social
 Services Reporting

In order to answer the questions raised in your memo of August 8, the Social Service Revision Committee, in consultation with the WIS Classification Committee, has further explicated the proposals outlined in my July 31 memo.

Delineated in this memo will be personnel allocations; the specific questions to be tackled; the timetable for implementation; and the role of the Maine system in the development of an integrated management information system for social services.

A. ALLOCATION OF PERSONNEL AND AREAS OF RESPONSIBILITY

First of all, because of the overlap in personnel and activities, we have combined the "Social Service Revision Committee," the "WIS Content and Classification Committee" (both delegated by Mr. Stumbras) and those staff members already assigned responsibility for the development of a computer reporting network into a single Management Information systems work group. The persons noted below are considered essential members of this group. In addition, the areas for which they would be responsible and their degree of involvement are noted.

| <u>Name</u> | <u>Responsibility</u> | <u>Time Allocation</u> |
|------------------|---|------------------------|
| Donna Biddle | Liaison to Maine consultants. Technical consultant for data processing. Coordinator of tasks related to implementation of Maine system. | 80% |
| Shirley Campbell | Program (Service & Management) content and definition. Consultant for program (Service & Management) policy. Development and implementation of training. Liaison with PFP. Liaison with interim WIN system. | 50% |
| Peter Albert | Consultant on operations of interim systems. Liaison for interim systems. Consultant on current Federal reports. Coordinator of break time activities. | 30% |

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| <u>Name</u> | <u>Responsibility</u> | <u>Time Allocation</u> |
|----------------|--|------------------------|
| Fred Buhr | Program (Service & Management) content. Liaison with goals committee. | 10% |
| Kathy O'Connor | Coordinator of manual preparation. Liaison with county plan. Liaison with purchased services. | 25% |
| Tom Corbett | Consultant on effectiveness measures. Consultant and liaison on current State and Federal systems. | 20% |
| Wayne King | Consultant on management utilization of data. Liaison with interim systems (DSS), WAM. | 10% |
| Anne Faletto | Program (Service) content consultant. | 25% |

It is estimated that the time demands listed for Tom Corbett, Fred Buhr, Anne Faletto and Kathy O'Connor would diminish considerably by February, 1973. The remaining people will be involved at the specified level until December, 1973. It has also been recommended that Ms. Campbell will act as Chairwoman for this work group.

B. PURPOSE OF WORK GROUP.

The over-all purpose of the work group will be to do the necessary preliminary program (Service & Management) content revision as well as plan and implement the conversion from a county based manual system to a computer based uniform state-wide information system for Social Services. This system will be an on-line computer data base with terminal input from county agencies. In addition, the work gang will deal with the interim reporting required to comply with Federal mandates.

Final implementation of this system for all counties has been scheduled for December of 1973. There will be a pilot project conducted with the Milwaukee Region counties (excluding Milwaukee County), Direct Services from Milwaukee Region, and one county from each of the other four Regions. The pilot project should begin around February 1, 1973.

C. TASKS TO BE TACKLED

In order to implement the goals noted in the purpose statement, the workgroup will tackle the following problem areas:

1) Statewide Uniform Case Numbers

The workgroup will implement immediately a uniform numbering system consistent with the format proposed by the Maine System. The basis of this system will be the individual's Social Security number plus the Social Security number of the principal household member.

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This system will be implemented by assigning Social Security numbers to all new cases, and by changing other cases as they are reviewed.

2) Uniform Case Definitions

The workgroup will develop and introduce a uniform method for defining cases. The basis for these definitions will be our present WIS classifications, plus guidelines for determining when a given family member should be considered a separate case.

3) Information Needs

The workgroup will systematically describe all present reporting requirements and outline as well as possible anticipated future information needs of the local, state, and federal agencies. This will be accomplished by utilizing the field advisory group plus the various liaison people in this work group. As noted on the attached P.E.R.T. chart, much of this has already been done. Completion of this task and review of the results by the Maine consultants will be done in September.

4) Training

During October and November and December appropriate training and manual materials will be prepared by Ms. O'Connor, Ms. Campbell, and Ms. Biddle in consultation with the Bureau of Manpower, other members of the work group and the Maine consultants. This package will include information on new program (Service & Management) content material, instructions for using the new forms, and assistance in utilizing the terminals. Training will take place as the terminals are introduced into the Counties beginning February or March, 1973.

5) Current Information Flow Study

Members of the work group along with the Maine consultants will study the present intra-agency data flow from a sample of county agencies differing in size as well as certain other characteristics. This will entail visits by Ms. Biddle and either Mr. Corbett or Mr. Albert to the county agencies during the month of September. Based upon this study, appropriate interim systems will be developed to obtain federally mandated information. In addition, a program for converting the present county manual systems to a computer based system will be formulated.

6) Conversion of Current Systems

With the assistance of the Maine consultants, new standardized forms will be prepared and introduced to the counties. It is envisioned that all present social service forms can be integrated into two or three basic forms. Introduction of these forms will be compatible with introduction of the terminals in the counties.

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7) Social Service Effectiveness Measures

The work group will study the possibility of developing both efficiency and effectiveness measures for the social service delivery system. This will entail the development of appropriate evaluation criteria as well as an adequate methodology for determining sample sizes that will be independently verified by regional personnel for both effectiveness and efficiency. Constructs may be borrowed from the Quality Control System in Public Assistance, Maine's program impact system, Madison Region's QC of Social Services Program, and the program effectiveness measures now being developed by Milwaukee County. Essentially this will be a feasibility study to determine whether or not Wisconsin possesses the resources and the program sophistication to accomplish this end. The tasks related to this question will be coordinated by Mr. Corbett.

8) Interim Reporting

The group will establish appropriate measures for meeting Federally mandated statistics while the system is being implemented. The work group has generally adopted the posture that meeting such requirements will receive low priority attention and not interfere with the basic task of developing a total M.I.S.

COST AND TIMING

Most of the cost estimates have already been outlined previously in budget requests prepared by Ms. Biddle. Other printing and training costs are not available at this time.

The timing of the project is outlined on the attached P.E.R.T. chart.

The work group has already begun to function pending appropriate administrative approval.

Finally, the role of the Maine and Federal teams will essentially be that of systems consultants. They will be responsible for transferring and documenting an appropriate systems package for gathering and maintaining a flexible data base on social services. They will also provide a number of programs designed to utilize that data base to meet Federal reporting requirements. Wisconsin will still be responsible for developing further programs to meet all Federal and State information needs.

PA:llt

cc: Shirley Campbell
Fred Buhr
Kathy O'Connor
Anne Faletto
Donna Biddle
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Tom Corbett
Joseph Gale
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