



DATA MATRIX

These suggested data points/metrics would enable leadership to manage the agency, operations staff to manage specific programs, supervisors to coach, mentor and hold employees accountable and staff to understand their own performance and the effectiveness of their work. The Matrix should include performance indicators for the administrative departments and staff. The specific data metrics will vary by agency.

Any of the data elements/metrics could be shared for transparency throughout the agency as leadership decides.

Role Definitions:

- **Leadership - Agency** - responsible for the overall financial, cultural and quality of agency
- **Department/Program Management** - directly accountable for financial, cultural and quality of specific programs/departments
- **Supervision** - directly responsible for a subordinates performance
- **Staff** - all staff

The use of data varies by role rather than title. Staff who have the responsibility for managing a program may also supervise individual staff, the data and its use is different for each role.

Data Domains Definitions:

- **Financial** - data related to the overall financial status of the agency, programs and productivity performance of staff
- **Human Resources/Staffing** - data related to understanding the recruitment and quality of agency staff
- **Quality Compliance** - data relevant to measuring the agencies performance, both program and administrative functions, against regulatory standards and against agency defined quality standards.
- **Population served** - data related to the people who are served by the agency
- **Outcomes** - data relevant to understanding the impact of agencies services on the people served, including performance of administrative support services

These domains identify a small number of financial and non-financial measures with targets that when reviewed make it possible to determine whether current performance 'meets expectations'. Each of these domains represent a distinct knowable view of the health of an agency. It is important that these are **balanced** - each target being crucial to the overall mission of the agency.



	Financial	Human Resource/Staffing	Quality Compliance	Population Served	Outcomes
Leadership /Agency	<ul style="list-style-type: none"> • Cash - on hand and projected • Agency and program P&L - capturing all revenue and expenses • Balance sheet • Collection rates by program (where applicable) • Census by program 	<ul style="list-style-type: none"> • Agency turnover; by position, by program, by length of service • Salaries against market • Vacancies by position, by program • Time to fill vacancies • Satisfaction/feedback for agency and program • Staff demographics 	<ul style="list-style-type: none"> • Agency leadership assess compliance risk, e.g. medical necessity, signed treatment plans, state audits • Agency sets quality standards • Incident reports • Data breaches 	<ul style="list-style-type: none"> • Demographics - e.g. age, gender, zip, all diagnoses , ethnicity, pay source • Client/person served satisfaction/feedback 	<ul style="list-style-type: none"> • Relevant outcomes defined by leadership
Department /Program Management	<ul style="list-style-type: none"> • Program P&L - crucial targets highlighted e.g. O/T, revenue • Program census • Collection rates • Program and staff productivity/performance 	<ul style="list-style-type: none"> • Turnover by program • Vacancies • Satisfaction/feedback for programs 	<ul style="list-style-type: none"> • Department/Program audit results • Program audit results against quality standards • Incident reports by program 	<ul style="list-style-type: none"> • Program demographic data • Program satisfaction results 	<ul style="list-style-type: none"> • Program level outcome data
Supervision	<ul style="list-style-type: none"> • Staff productivity/performance 	<ul style="list-style-type: none"> • Individual staff performance goals 	<ul style="list-style-type: none"> • Individual staff quality and compliance issues 	<ul style="list-style-type: none"> • Relevant demographic data by caseload 	<ul style="list-style-type: none"> • Specific outcomes by caseload/individual
Staff	<ul style="list-style-type: none"> • Specific productivity/performance standard and achievement 	<ul style="list-style-type: none"> • Individual evaluation 	<ul style="list-style-type: none"> • Performance against specific quality + compliance standards 	<ul style="list-style-type: none"> • At least one clinical indicator e.g. DLA 20 to share with clients to indicate progress 	<ul style="list-style-type: none"> • Outcomes by caseload/individual