



## Kristen Cox

Former Executive Director of the Governor's Office of Management & Budget for the State of Utah where she orchestrated a 35 percent improvement across Utah's \$20B executive branch.

Founder & CEO of Epiphany Associates.

Published author, keynote speaker, international thought leader, consultant, host of the *Stop Decorating the Fish* podcast.



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Solving the impossible

# Success Stories

Missouri Dept. of Social Services – Children’s Division

Homelessness in Allegheny County, PA

Utah’s Juvenile Justice System (JJS)

North Dakota’s Dept. of Human Services



“An organization’s biggest constraint is management’s time and attention.”

Dr. Eliyahu Goldratt



# A day in the life...

- Talking budget/accounting/purchasing
- Dealing with the death of a child by neglect/abuse
- Dealing with the death of a parent by suicide or overdose
- Listening to an angry parent
- Trying to improve the work environment for your staff
- Navigating political legislation
- Media appearances
- Balancing state and federal mandates
- Engaging with stakeholders, cultural groups, advocates



All improvements require change, but not all changes produce improvements.

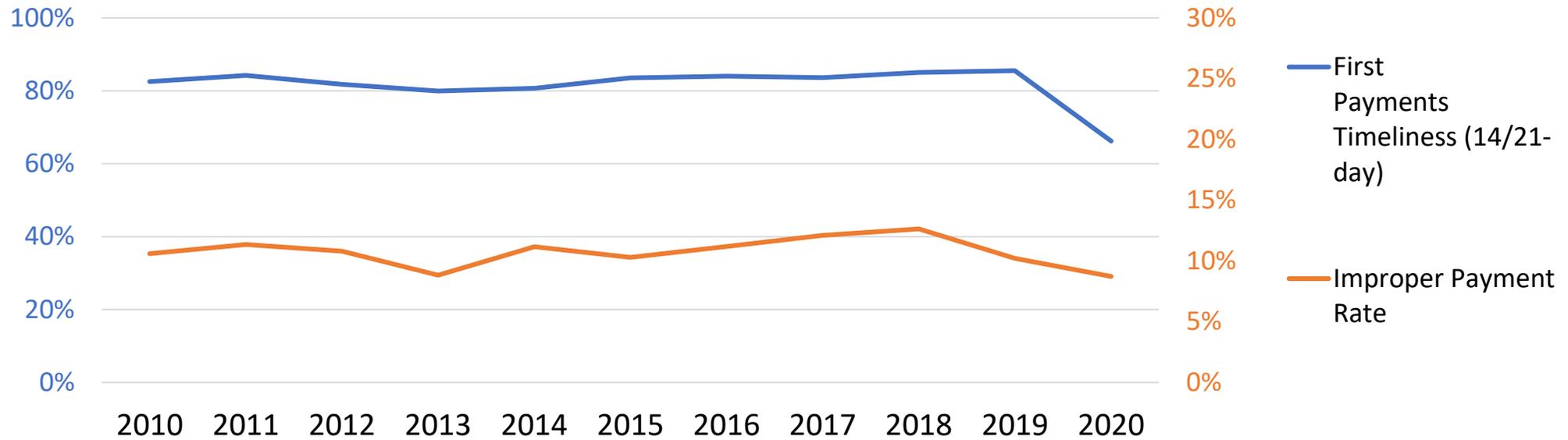


# Medicaid spending example

Cancer screenings for women	1.4% growth per year
Preventative care	0.4% growth per year
Child immunizations	0.3% growth per year
Medicaid PMPM	4.4% growth per year
PMPM in 2000 = \$393	PMPM in 2020 = \$624



# Unemployment Insurance Program Performance (Nationwide)



Administration

Priorities

- **\$600 million to modernize vulnerable state IT systems and improve program integrity**, countering decades of underinvestment that led to significant fraud and payment errors. These new grants will help states modernize IT systems, enabling faster responses to fraud, decreases in erroneous payments, and more efficient claims processing.



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With everything we could do, need to do, or know we should do, how do we decide what to do?



# Focus Filter

Start with what your primary customer cares most about—not what is best for the bureaucracy

Focus on the constraint

What do you have direct control and stewardship over?



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# Administration for Children & Families 2022 Strategic Plan

## STRATEGIC GOAL 1

Advance equity by reducing structural barriers including racism and other forms of discrimination that prevent economic and social well-being

### STRATEGIC GOAL 2

Take a preventative and proactive approach to ensuring child, youth, family, and individual well-being

### STRATEGIC GOAL 3

Use whole-family, community-based strategies to increase financial stability and economic mobility

### STRATEGIC GOAL 4

Support communities and families to respond to acute needs and facilitate recovery from a range of crises and emergency situations

### STRATEGIC GOAL 5

Enable and promote innovation within ACF to improve the lives of children, youth, families, and individuals

*As shown in the graphic above, Strategic Goal 1 is intended to be an explicit part of each of the other four goals, since advancing equity must be central to everything we do and how we do it.*



# Juvenile Justice System Example



# Juvenile Justice System (JJS) Case Study

**Primary Customer:** Youth in detention

**Primary need:** A new way to think about and address problems and challenges

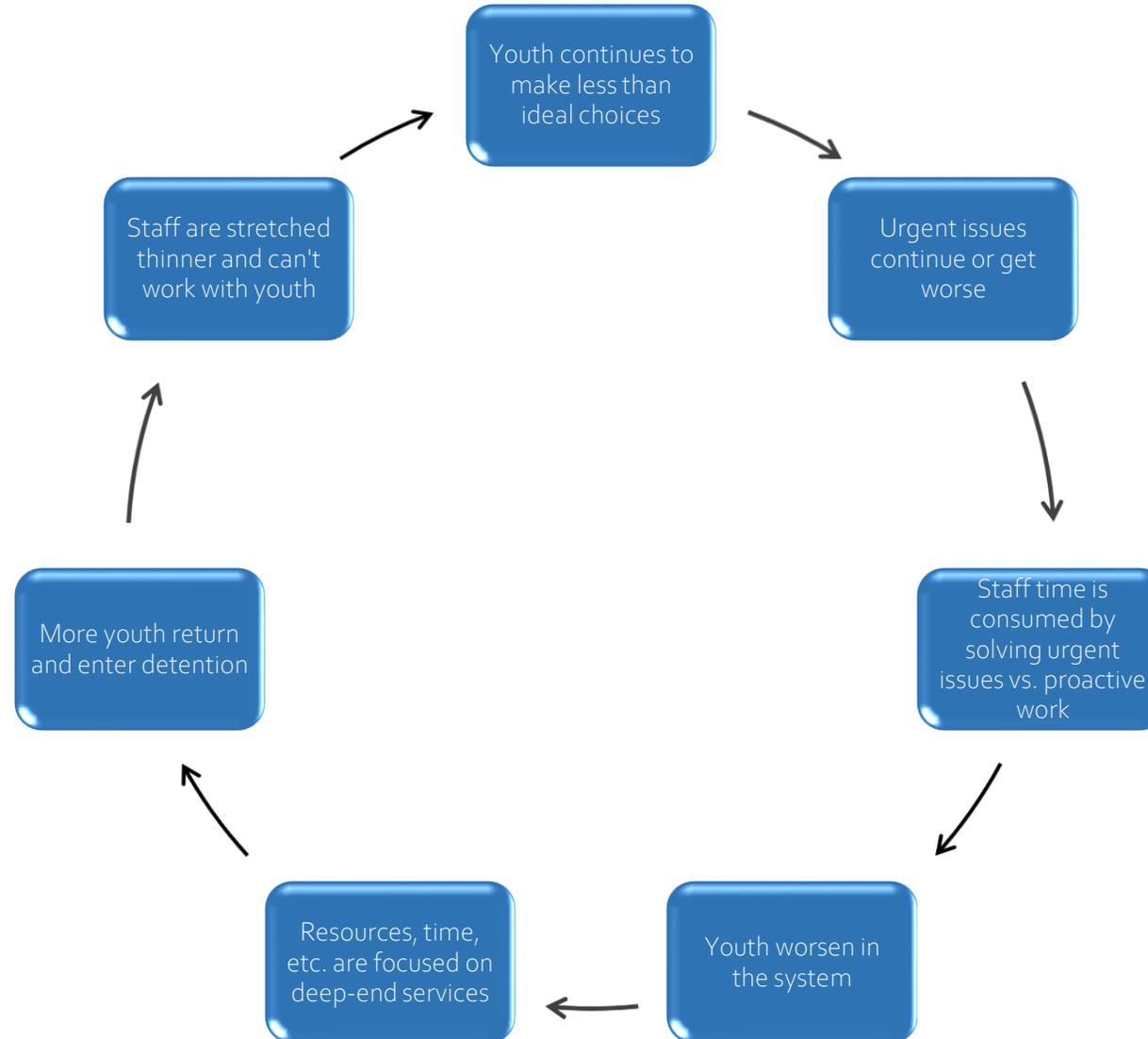
**Strategic customer:** Staff working directly with youth

**Primary need:** Time to provide the intervention

**Solution:** Provide an evidence-based model to help youth reframe problems, make better decisions, and forge healthier relationships



# JJS Vicious Cycle



# Juvenile Justice System (JJS) Case Study

The project freed up more than 1,100 additional employee hours to focus on delivering each youth in custody 12-hours of treatment a week for positive, sustainable change.

The number of reported assaults decreased by 50% and family satisfaction with JJS services increased by 26%.

Youth leaving JJS custody are less likely to recidivate as indicated by a 31% reduction in their average risk scores.

The work has continued leading to a shift in how funds are used and where youth are served-- going from approximately 600 youth in detention to less than 300 with more robust services in prevention and in the community.



# Avoid the Seductive Seven

More Money	More Strategic Planning
More Data	More Training
More Reorganization	More Blame &
More Technology	Accountability



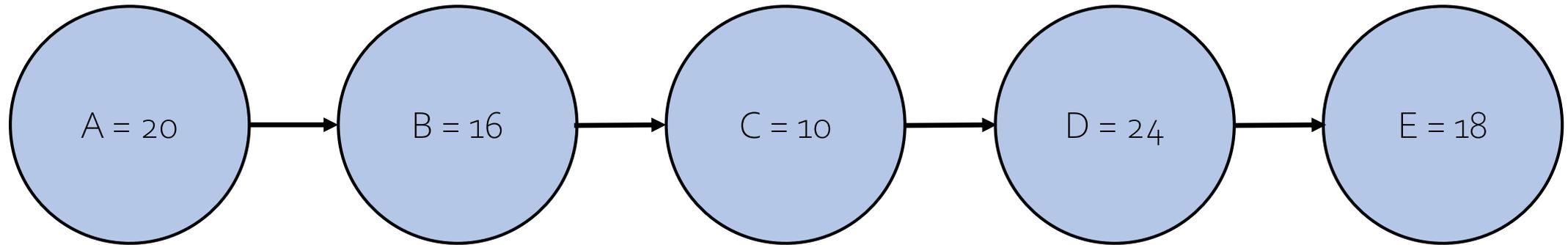
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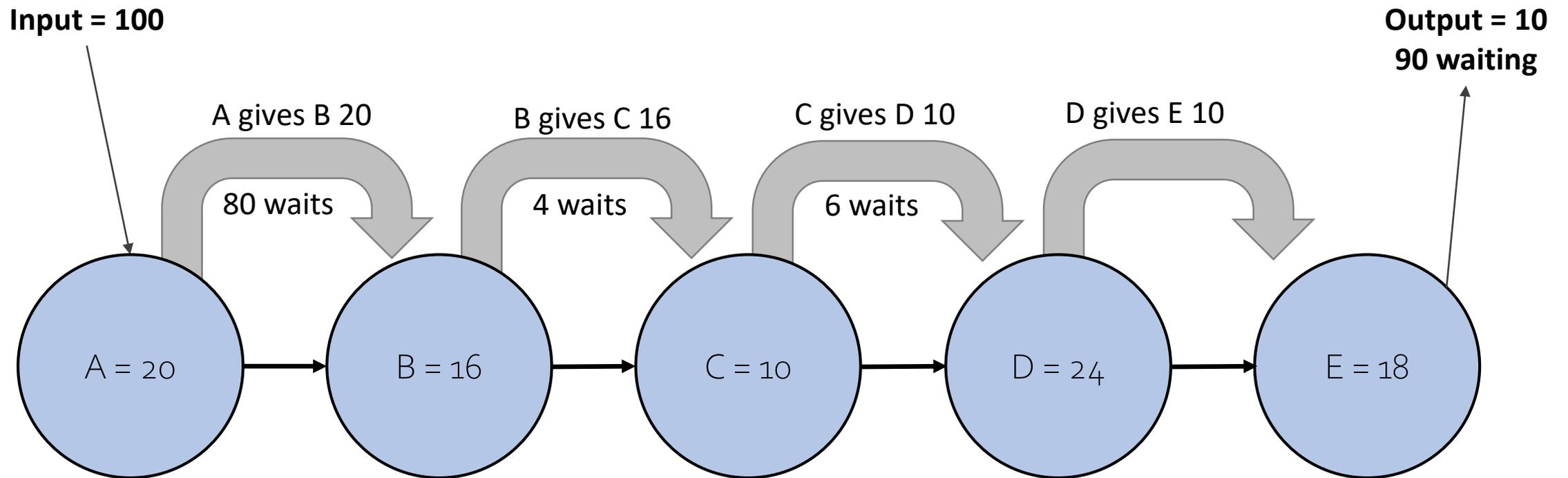




How many units can this system produce an hour?

What function is constraining the throughput of the entire system?





How many units can this system produce an hour?

What function is constraining the throughput of the entire system?



# Doctor's Office



# System Map

**System Name:** Homeless and Behavioral Health Services.

**Goal:** Provide supports and services to people who experience housing insecurity and have behavioral health needs in order to maximize their independence.

**Direction of Solution:** The right services are provided in the right amount, at the right time, to achieve the goal.

**System Performance Measures:**

- Length of stay
- % returning to system after exit
- Reduction in levels of care
- Reduction in risk/adverse incidents



<ul style="list-style-type: none"> <li>• Triage: We have simple tools that allow us to quickly identify early levels of acuity in a comprehensive and consistent way across the system.</li> <li>• We are able to use existing diagnoses when available or have a scalable quick way to determine this.</li> </ul>	<ul style="list-style-type: none"> <li>• We have insight on needs and bed availability.</li> <li>• Low-WIP: We have competent individuals available to quickly make placement decisions.</li> <li>• Triage: We are making placement decisions that best match customer needs to provider capabilities.</li> <li>• Full-kit: Additional resources are arranged for clients with specialized needs for certain placement decisions (if appropriate).</li> <li>• We are re-triaging clients on the waitlist.</li> <li>• We are determining which provider is lead for clients (if multiple).</li> </ul>	<ul style="list-style-type: none"> <li>• Clients receive services immediately once services decisions are made</li> <li>• Clients know what to expect from the beginning and are being heard.</li> <li>• Full-kit: Clients have everything they need to begin services.</li> </ul>	<ul style="list-style-type: none"> <li>• Triage: We are continually assessing customer progress and making changes based on customer needs.</li> <li>• We are synchronizing resources according to clinically driven client milestones and expected discharge dates.</li> <li>• We have a hierarchy of services established to ensure focus for clients.</li> <li>• We are achieving full-kit at program exit.</li> </ul>
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In social services, the system constraint is  
how fast the person we serve chooses to  
change



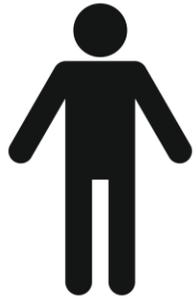
# Focus Filter

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Today



The Gap

Destination

What we can control: Providing the right service, at the right time, in the right amount



# Direction of the Solution

Provide the right services, at the right time, in the right amount to help customers achieve their goal.



# Milestone Management

CURRENT BEHAVIORS	DESIRED BEHAVIORS
Individuals/families struggle to comply with multiple plans, activities and requirements.	Plans and activities are designed based on the capacity of the individuals/families. Plans focus on one or two milestones at a time.
We don't have objective criteria that help us understand when individuals are ready to exit. We prioritize assessments and rely on front line staff to make subjective decisions.	We've defined clear criteria on exit readiness and use assessments to define services people need to successfully exit.
We manage caseloads	We manage caseload movement
We continue to focus time and attention on new, evidence-based practices we don't design the operations to accommodate for and don't have the time/resources to implement	We optimize operations and process flow to generate capacity and improve quality
We waste precious staff capacity with too many policies, forms, training, etc.	We support staff by enabling them to spend the right time and resources on the right people
We don't have clarity into the reasons why people are stuck and not making progress	We have real-time information that helps management and policymakers understand where investments should be made to help facilitate quality outcomes for people

# Our solution consists of three strategies:

1. Increase capacity
2. Implement FITT (frontloading, intensity, type, time)
3. Use Milestone Management software to manage case movement



**Strategy #3:** Use Milestone Management software to manage case movement



# Milestone Management

- IT itself is not the solution, but it can be an important tool.
- Northstar is designed to cement in the desired behaviors and use the minimum amount of data points to help answer the following questions:

## Front-Line Staff:

- How is my client progressing towards a successful exit? What do they need to focus on now to make progress on their goals?
- Of all the clients on my caseload, which one should I focus on next?

## Supervisors:

- Of all of my employees, and all of the cases they are working on, where do I need to spend my time and attention?
- Am I seeing trends in the cases that may show that there's a policy or training issue—something my staff may not be clear on?

## Leadership:

- Is our program helping people progress against their stated outcomes? If not, why not? What specific policy or resource issues are impeding people's progress the most?
- What are the most common services individuals use that we need to provide incredibly well?



# Milestone Management

Epiphany



Millicent Towne V [Edit](#)

Date of Birth 1992-12-14

Target exit date

Gender Male

Address Apt. 893 39799 Boyer Square, South Alethaburgh, NY 62241-0896

Contact

Create a Milestone

## Milestones

Name	Start date	End date	Progress	Target exit date
<a href="#">Increase knowledge of pre-employment and/or employment search tools</a>	2023-01-02	2023-01-27	Stuck [420%]	
<a href="#">Increase knowledge and understanding of legal resources</a>	2023-02-26	2023-03-02	In-progress [1250%]	
<a href="#">Establish/re-establish connection to primary care</a>	2023-02-24	2023-03-04	In-progress [650%]	
<a href="#">Connect to appropriate literacy program</a>	2022-04-29	2023-03-10	In-progress [112%]	
<a href="#">Establish/re-establish 1 or more positive relationships</a>	2023-02-01	2023-05-11	In-progress [76%]	
<a href="#">Increase knowledge and understanding of legal resources</a>	2023-02-20	2023-03-04	Completed [83%]	

# Milestone Management

Epiphany

Q Search



## My Clients

+ Add New Client

Name	Milestone Name	Milestone Plan Status	Target Completion Date	Target exit date	Last client communication
<a href="#">Delois Bartoletti</a>	Obtain/maintain adequate, healthy food supply	Stuck		2024-01-20	
<a href="#">Test Update</a>	This is a test	Stuck [3850%]	2023-02-01		
<a href="#">Ryan Reynolds</a>	Obtain/maintain adequate, healthy food supply	Stuck [567%]	2023-03-20	2023-06-30	
<a href="#">Millicent Towne V</a>	Increase knowledge of pre-employment and/or employment search tools	Stuck [420%]	2023-01-27		
<a href="#">Emerson Schowalter</a>	Increase knowledge of safe use, harm reduction, and cessation options	Stuck [92%]	2023-05-05		2023-01-09
<a href="#">Delois Bartoletti</a>	Monty Python and the Holy Grail	Stuck [88%]	2023-05-10	2024-01-20	2023-01-07
<a href="#">Millicent Towne V</a>	Increase knowledge and understanding of legal resources	In-progress [1250%]	2023-03-02		
<a href="#">Msgr. Kenton Ferry</a>	Increase knowledge of tobacco reduction/cessation options	In-progress [700%]	2023-02-28	2023-05-11	
<a href="#">Millicent Towne V</a>	Establish/re-establish connection to primary care	In-progress [650%]	2023-03-04		
<a href="#">The eld</a>	New milestone with comment	In-progress [382%]	2023-01-28		
<a href="#">The eld</a>	New milestone 1	In-progress [353%]	2023-01-31		



# Milestone Management

**Supervisor**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In tempus felis vel mollis tristique.

[+ Add Case Manager](#)

**Active Staff**

Milestone Accomplished On-Time ( Last 3 Month)

<input type="checkbox"/>	Staff name	Number of Clients	Overall Milestone Statuses	Milestone Accompli	Stuck Reasons (Past 3 Mon...)
<input type="checkbox"/>	John Doe	5	2 2 1	46% Accomplished	Lorem ipsum dolor sit amet...

<input type="checkbox"/>	Client Name	Case Manager	Risk Score Range	Milestone Status	Stuck Reasons
<input type="checkbox"/>	Joanna Smith	John Doe	High	Stuck [26%]	Praesent laoreet vulpate neque
<input type="checkbox"/>	Joanna Smith	John Doe	High	Stuck [21%]	Praesent laoreet vulpate neque
<input type="checkbox"/>	Alis Jackson	John Doe	High	In-Progress [86%]	
<input type="checkbox"/>	Eric Davis	John Doe	Medium	In-Progress [73%]	
<input type="checkbox"/>	Jack Nelson	John Doe	Low	Not Started	



# Milestone Management

## Dashboard



### Program Trends



### Top Stuck Reasons

2022 2021 2020



Export Stuck Reasons

### Flow by Program Phase

2022 2021 2020

	Initial Contact	Eligibility
Median Duration (Days)	12	32
# Active Clients (% Stuck)	37 (18%)	48 (29%)





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Kristen Cox  
Yishai Ashlag

# THE WORLD OF DECORATING THE FISH

Putting the Seductive 7  
Framework in Action

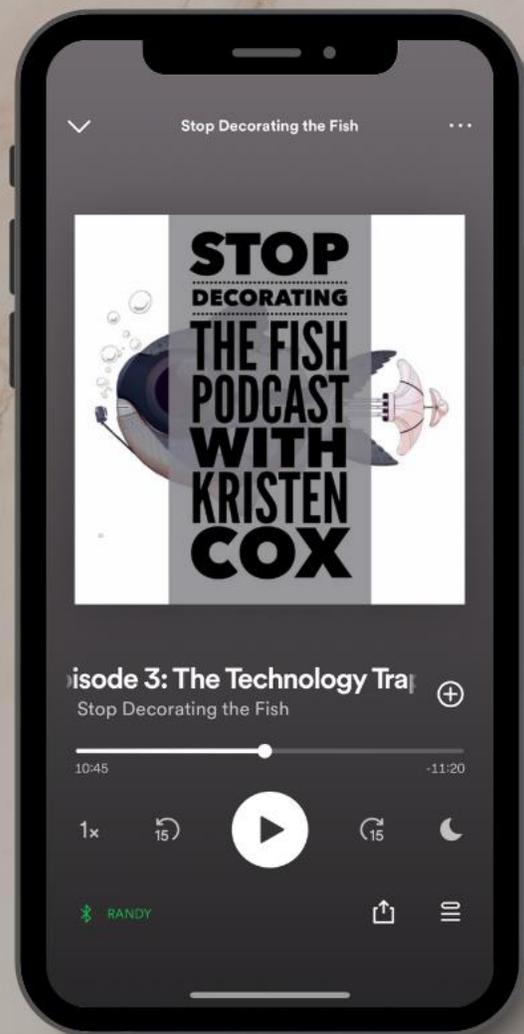
Kristen Cox

Yishai Ashlag

# STOP DECORATING THE FISH



Which problems  
to ignore and which  
problems really matter



# Stop Decorating the Fish Podcast

AMAZON MUSIC  
AUDIBLE  
APPLE PODCASTS  
GOOGLE PODCASTS  
SOUNDCLOUD  
SPOTIFY  
STITCHER



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