# The Data Access Experience at DHW

UNCOVERING INSIGHTS FROM THE DHW STAFF AS THEY ACCESS, SHARE AND USE DATA IN DAILY OPERATIONS



a User Experience Report prepared by **Hope Kiefner and Noah Woodring**

# Table of Contents


1. Purpose
2. Executive Summary
3. Methods
4. User Persona
5. User Journey Map
6. Key Findings
7. Recommendations
8. Next Steps

# Purpose

Information Technology Services (ITS) launched a Research Project to better understand how DHW staff access, use, and manage data across all divisions. This initiative **mapped user journeys and surfaced pain points,** identifying barriers and risks in the current data access experience. These insights lay the foundation for **improving system usability, streamlining workflows,** strengthening governance, and creating a more intuitive, user-friendly approach to data access.

Accurate, accessible, and secure data is critical to DHW's ability to deliver services effectively and make data-driven decisions. Staff across the department often face usability challenges such as, struggling to access the data they need, **navigating complex information architecture** across multiple systems, and dealing with inconsistent workflows. They also have to balance ease of use with compliance and security requirements, which can create friction. By mapping these user journeys and identifying pain points, we can design targeted improvements that **enhance findability,** streamline navigation, and **create a more intuitive, user-friendly experience** while maintaining trust and security.




## Project Goals

1. Strengthen data security and governance with transparent processes and clear permissions to reduce risk.
2. Improve accessibility with intuitive navigation and clear structure so staff can quickly find, trust, and use information.
3. Guide system modernization with a user-centered design approach. Incorporating policy updates and training investments to reduce friction

# Executive Summary

## Finding 01

### Access is secure but not always clear

Staff generally have appropriate access and follow least-privilege practices, but **rely heavily on informal knowledge** to understand what data exists and how to request it.

## Finding 02

### Tools are trusted but limit efficiency

Tools like Tableau, Identity Director and SharePoint are widely used, yet limited flexibility and **complex permissions lead users to manual workarounds** and increased reliance on key individuals.

## Finding 03

### Governance is valued, but standards are inconsistent

Data governance practices vary widely across divisions, with **limited standardization of policies**, templates, and approval processes. This leads to confusion, **reliance on informal knowledge**, and missed opportunities for consistent, secure data management.

## Finding 04

### Collaboration is desired but siloed

Cross-divisional data sharing is constrained by organizational silos, even though staff express strong **interest in using data more collaboratively** and proactively.

# METHODS

# Methods

## Overview

With assistance from Patty Alonzo, a comprehensive interviewee list was developed. Research **participants were drawn from multiple divisions** within the Department of Health and Welfare, including Youth Safety & Permanency, Management Services, CYFS, State Care Facilities, Division of Financial Services, Family and Community Partnerships, Self-Reliance, and Production Services.

Participants represented a diverse range of roles, spanning from Software Engineers to Financial Managers. All interviews were **conducted virtually via Microsoft Teams.** An interview guide was designed to address key questions outlined in the project memo authored by Jerred Edgar.

## Thematic Analysis

We conducted a thematic analysis of interview transcripts to identify **recurring patterns and insights across divisions.** This process combined AI-assisted text analysis with manual review of our own notes to ensure accuracy and context. AI tools were used to cluster similar ideas and highlight frequently mentioned concepts, while our team validated and **refined these findings to extract actionable themes:**

01 Strong Security and Compliance Practices

02 Desire for Cross-Divisional Collaboration

03 Fragmented Governance

04 Over-Reliance on Individuals

## Interview Questions & Data Collection

### Day-to-Day System Access

1. Tell us about your role and the team you work on.
2. What does a typical day at work look like for you?
3. What systems or types of data do you currently have access to?
4. How would you rate the ease of accessing those systems (1-5)? Why?
5. If your role were to change or you switch teams, how is your access reviewed or updated?

### Prior Knowledge

1. Are you familiar with Idaho's data classification levels (Class I–IV)? Could you briefly describe what they mean or how they apply to your work?
2. The principle of least privilege can be explained as granting users the minimum access necessary to perform their job functions. Can you describe how this applies to your role/team?
3. Have you received training or guidance on data access policies or tools? Was it helpful?
4. Are you aware of what data you do/do not have access to? How do you find out?
5. Do you utilize MFA? How is that process for you?
6. Are you aware of any monitoring or auditing of data access in your systems? Does that affect how you work?

### Data Access/Sharing

1. How do you feel about the process of requesting access to data? Do you feel confident navigating it on your own, or do you rely on others?
2. How do you utilize the data you have access to in your role?
3. How frequently do you need access to that data:
4. Can you give an example of sensitive data you work with? How do you ensure it's handled appropriately?
5. How do you share data within your organization?
6. Do you ever share data externally? If so, how and with whom?
7. Is there any data you have access to but never use?
8. Is there anything you can't currently access that would make your work easier or more efficient?

### Questions for Improvement

1. Do you feel your current access aligns well with your job responsibilities? Why or why not?
2. What works well with the current data access process? (You would notice if this feature changed)
3. Do you have any questions for us? And is there anything you wanted to discuss that we didn't ask a specific question about?

**38** Total Interviewees

- **5** Bureau Chiefs
- **2** Directors
- **14** Managers
- **4** Supervisors
- **3** Specialists
- **2** Management Assistants
- **4** Analysts
- **2** Software Engineers
- **1** Auditor
- **1** Administrator

# USER PERSONA

# The DHW User Persona

## What is a User Persona?

A user persona is a research-based profile that **represents a key group of users.** It is created by synthesizing patterns observed across multiple interviews, not by describing a single individual.

## Why does this Persona Matter?

This persona represents the majority of DHW staff who request, use, and share data to support program operations, reporting, and decision-making.

## Who is our user?

A **data-informed DHW employee** who uses reports and dashboards to support programs, follows strict security practices, and often **depends on personal networks** to find and access the right data in a fragmented system.



**Name:** Mike Thompson

**Age:** 52

**Tenure:** 12 Years at DHW

**Education:** Bachelor's in Business Administration

**Job Title:** Senior Program Specialist

# The DHW User Persona



**Name:** Jordan Lee

**Age:** 27

**Tenure:** 4 Years at DHW

**Education:** Bachelor's in Information Systems

**Job Title:** Data Analyst

### Data Access Needs

- Role-based **access to dashboards and reports**
- Ability to explore data independently
- Access to aggregate, de-identified data

### Roles & Responsibilities

- Support program operations and reporting
- **Use data to inform decisions and justify funding**
- Coordinate across internal teams
- Request and share data as needed

### Data Sharing Practices

- Primarily shares data internally
- Uses approved platforms only
- **Avoids unnecessary access** to sensitive data

### Tools & Systems Used

- Tableau (dashboards, analytics)
- SharePoint (files, reports, collaboration)
- Microsoft Teams & Email (communication)

### Access Experience

- Comfortable using tools once access is granted
- **Less confident knowing** what data exists or **who owns it**
- Relies on trusted data/IT contacts
- Familiar with security requirements (VPN, MFA, approvals)

### Pain Points

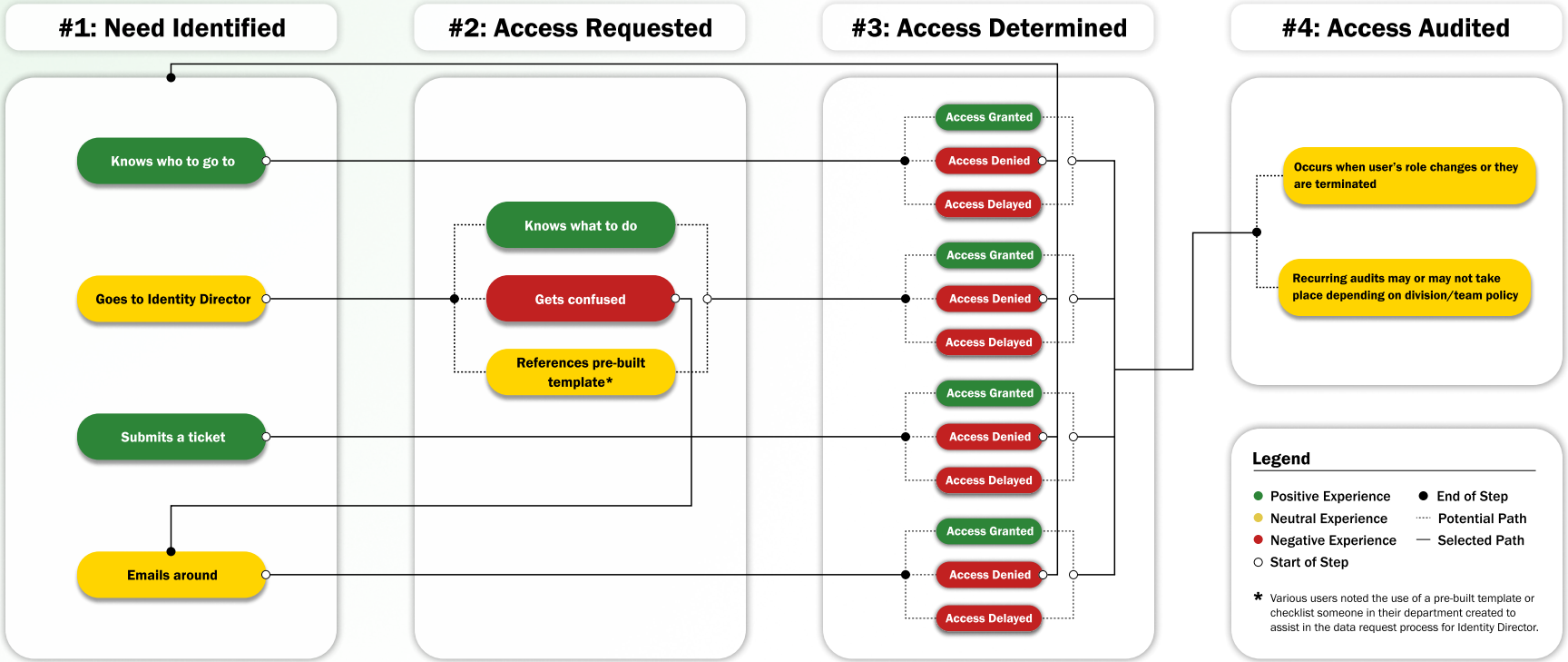
- Hard to find existing data or owners
- **Inconsistent access request processes**
- Limited self-service capabilities
- Cross-division silos
- **Tool changes** without adequate training

### Positive Experiences

- Direct **contacts speed up access resolution**
- Strong support from data and IT teams
- Clear approval paths for sensitive data
- Shared culture of responsible data use

# JOURNEY MAP

# The Data Request Experience



# KEY FINDINGS

# Key Findings Overview

01

## What's Working Well

Staff use data responsibly and trust core systems and processes.

02

## Policies & Governance Documentation

Staff follow governance in practice but lack visibility into formal policies.

03

## Cross-Divisional Data Sharing

Organizational silos limit effective cross-divisional data sharing.

04

## Identity Director Usability

Usability issues slow access changes and create workarounds.

05

## Over Reliance on Inviduals

Access and knowledge depend heavily on individual relationships.

06

## Training Potential

Training is informal, with strong need for tool-specific guidance.

# What's Working Well

- Staff demonstrate strong awareness of data sensitivity and security.
- Teams are supportive and collaborative *within* divisions.
- Core systems are trusted once users understand how to use them.
- Access is generally appropriate to job responsibilities once granted.

> **"I always approach things from the minimally necessary.**
>
> *Interview Subject #18*

> **"I've been here long enough and I know the players and we can network together and get each other what we need.**
>
> *Interview Subject #20*

> **"All the tools are mature technology, so everything runs smooth.**
>
> *Interview Subject #34*

> **"You only have the client access to the clients that have been referred to you. That's it.**
>
> *Interview Subject #19*

KEY FINDINGS

# Policies & Governance Documentation

- Staff generally understand what they are allowed to do, but not where to find formal policies.
- Governance knowledge is often learned through experience rather than documentation.
- Policies are perceived as fragmented, outdated, or hard to locate.
- Users want clearer, centralized, and role-specific guidance.

> “When it comes to data governance or cataloging tools, things like that. That’s where we need more support. It doesn’t really seem like there’s really anything for us.
>
> *Interview Subject #29*

> “I've learned to keep some long lists of documentation because usually it is something that I have to dust off and bring forward.
>
> *Interview Subject #13*

> “I think data governance is something that people don't think enough about and I would really love it if there were tools and frameworks and structures that we could leverage to build more governance.
>
> *Interview Subject #28*

KEY FINDINGS

# Cross Divisional Data Sharing Issues

- Individuals report that divisions operate largely in silos with limited awareness of shared data assets.
- Data sharing often requires personal relationships or informal agreements.
- Uncertainty around permissions and governance slows collaboration.
- Staff expressed interest in clearer pathways for cross-division access.

> “There's this idea that we can't share data internally even though we're one department, which has created huge data silos. The future of data in government is much bigger than that.
>
> *Interview Subject #31*

> “I needed data from [a different division in the department] and I got railroaded. It was because they weren't sure what they could and couldn’t share.
>
> *Interview Subject #3*

> “Everybody's system is so different, all their levels of data are different. I wish there was something standardized. I wish we were all meeting together to have these conversations.
>
> *Interview Subject #32*

KEY FINDINGS

# Identity Director Usability

- Users find the interface unintuitive and difficult to navigate.
- Common tasks (requesting, modifying, or revoking access) take longer than expected.
- Errors or unclear statuses lead users to seek manual help.
- Many rely on specific individuals to complete requests successfully.

> **To try and figure out what the request actually is in Identity Director. That part is a huge pain.**
>
> *Interview Subject #4*

> **You don't always know that you're asking for the right thing, and oftentimes it takes several iterations to get the right combination of permissions for a particular role.**
>
> *Interview Subject #10*

> **I actually hate the Identity Director system. It is not intuitive.**
>
> *Interview Subject #5*

> **Somebody's got to help you navigate to know which thing to request.**
>
> *Interview Subject #22*

KEY FINDINGS

# Over Reliance on Individuals

- Access success often depends on knowing “the right person.”
- Institutional knowledge is concentrated among a few long-tenured staff.
- Absences or turnover can delay access or data use.
- Users recognize this as a risk to efficiency and continuity.

> “We have a magic person named —— and he maintains all of the rules and we follow his handbooks.
>
> *Interview Subject #7*

> “When it comes to modifying or giving permissions, I usually have to go phone a friend.
>
> *Interview Subject #10*

> “It's also hard because I tend to be the point of contact for putting in people's access, and I don't know everybody's jobs or roles.
>
> *Interview Subject #14*

> “We ended up making one staff person, like figure it out, take some notes... we actually wrote ourselves a process guide.
>
> *Interview Subject #5*

# Training Potential

- Training primarily occurs through peer support and on-the-job learning.
- New staff rely heavily on coworkers for system and process knowledge.
- There is demand for task-based training tied to tools and workflows.
- Users want updates communicated clearly when systems or policies change.

> **“What I found in a lot of the training videos, they’re like 45 minutes or an hour long. If I had something that could give a 10-15 minute overview I would [attend].**
>
> *Interview Subject #27*

> **“I would be more than happy to attend a [session about], ‘Here are [tools] that are available.’ You don’t know what you don’t know.**
>
> *Interview Subject #19*

> **“What we have learned is that we have to keep an ear and an eye to the ground for updates from the IT department… It’s kind of buried in there now.**
>
> *Interview Subject #32*

> **“I think it’s needed and it’s necessary.**
>
> *Interview Subject #3*

# RECOMMENDATIONS

# Recommendations*

01

## Form a Cross-Divisional Working Group

- Share what's working well and lessons learned across divisions.
- Work together to **define shared governance principles**, clarify ownership of data assets, and create standardized guidance for data access, classification, and sharing.
- This group should help **reduce reliance on informal knowledge** by making expectations explicit and visible, while ensuring governance decisions reflect real operational needs.

02

## Establish Standards for Cross-Divisional Data Sharing

- Collaborate across divisions to **define what data can be shared internally**, under what conditions, and through which approved mechanisms.
- Shared standards and templates (e.g., data-sharing agreements, approval checklists) will help replace informal negotiations with predictable, trusted processes and reduce uncertainty that currently slows collaboration.

03

## Promote Formalized Access Workflows to Reduce Dependency on Individual "Gatekeepers"

- Document and **standardize common access scenarios** and approval paths to ensure success does not depend on knowing the "right person."
- Clear criteria for access, combined with defined points of accountability, will improve continuity during staff absences or turnover and reduce delays caused by ad hoc troubleshooting.

04

## Introduce Lightweight, Governance-Focused Training and Change Communication

- Provide short, task-based training that explains not just how to request or manage access, but **why governance rules exist** and how they apply in daily work.
- Pair this with **clear communication when policies or systems change**, so staff are not dependent on word-of-mouth or personal networks to stay informed.

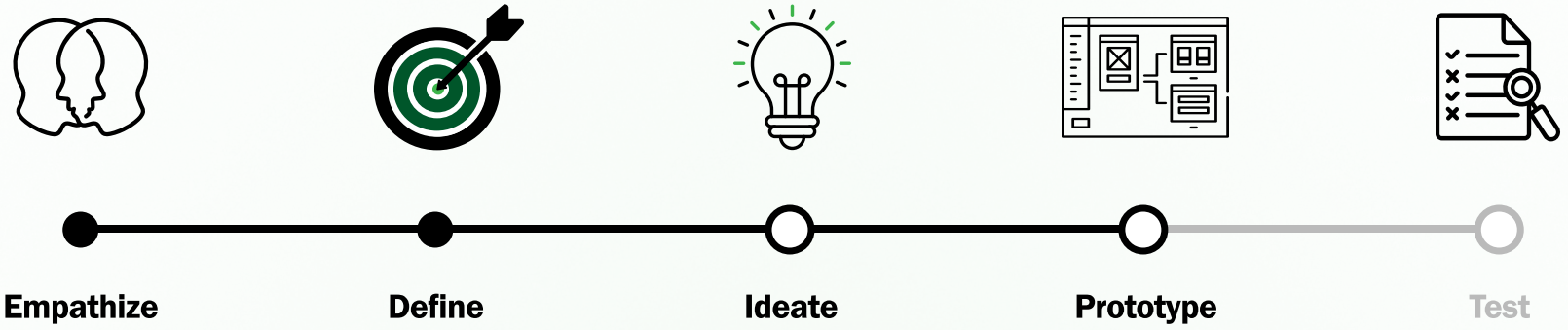
* *Recommendations are listed in order of priority. Highlighted recommendation denotes the solution we recommend prioritizing.*

# NEXT STEPS

# Applying UX Strategies To DHW

Design thinking is an iterative, human-centered process that moves from understanding user needs to defining problems, generating ideas, and testing solutions. It emphasizes **learning through collaboration and experimentation** before committing to large-scale change.

In this project, **we focused on the Empathize and Define phases** by conducting user interviews and synthesizing insights to clarify pain points. With this foundation in place, the following slide outlines potential next steps that move the work into Ideation and Prototyping, where solutions can be collaboratively designed, tested with real teams, and **refined before being scaled or formalized.**



# Next Steps*

### Step 01

## Form a cross-divisional pilot working group

- Identify a small, representative group (6–10 participants) from two divisions that frequently collaborate
- Include data owners, operational users, and governance/ compliance stakeholders
- Define clear scope and expectations, including:
  - Focus on cross-divisional data sharing
  - What the group can decide vs. where it provides recommendations
  - A time-bound pilot with clear outcomes (e.g., 8–12 weeks)

### Step 02

## Make current data-sharing practices visible

- Facilitate a working session to document:
  - What data is currently shared
  - How approvals happen today (formal and informal)
  - Pain points, delays, and workarounds
  - Identify where uncertainty or rework most often occurs
- Outputs:
  - Journey map or diagram
  - List of “known unknowns” and friction points

### Step 03

## Co-design and prototype shared standards

- Collaboratively define:
  - What data can be shared across divisions
  - Conditions and constraints (e.g., sensitivity, purpose, roles)
  - Approved mechanisms for access and sharing
- Prototype key artifacts, such as:
  - A lightweight data-sharing agreement template
  - An approval checklist or decision tree
  - Clear ownership and escalation paths

### Step 04

## Test the Prototype with Real Use Cases

- Apply the prototype to 1–2 active cross-divisional data requests
- Observe:
  - Time to approval
  - Clarity of expectations
  - Points of confusion or friction
- Gather quick feedback from participants

### Step 05

## Iterate and prepare for scale

- Refine artifacts based on pilot feedback
- Identify:
  - What should become shared standards
  - What needs flexibility by division
- Document recommendations for:
  - Governance alignment
  - Broader rollout
  - Ownership of ongoing maintenance

** Note: This process is designed to be a low-risk, learn-fast approach, **NOT** a top-down governance rollout. These steps intentionally avoid over-engineering until testing has been conducted with real teams.*

# Thank You!

We would like to extend a special thank you to Patty Alonzo, whose collaboration was integral throughout this project.

We also want to extend our sincere appreciation to all participants for generously sharing their time and insights.



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