

# BENEFITS PACKAGE DOCUMENTATION

## INTAKE IMPLEMENTATION INITIATIVE

Event Id: CAF-SS02\_1.1  
Version 1.0

### EXECUTIVE SUMMARY OF THE INITIATIVE

Over an 11-week period, CAF Lean Leaders and the Implementation Team rolled out a consistent statewide process of scheduling intakes for food stamps, medical and daycare benefits. The initial results are positive. Oregonians are receiving their benefits on average 9 days sooner than prior to implementation of the new Intake model. Currently 92% of clients are being seen the same or next day. No matter when they are seen, 65% are receiving their benefits on the same day as their intake appointment. Customer Satisfaction Surveys are 98.5% positive. With intakes being seen on average 9 days sooner, ~\$920,000 is generated earlier into the community, equaling ~\$1,600,000 in economic activity earlier each month into the Oregon economy. In addition, with those food needs met, families are not turning to food banks while waiting, saving \$410,400 of resources for other hungry Oregonians through the food banks each month. Additionally, CAF employees have become ~5% more efficient in the process, which is equivalent to reinvesting ~26 FTEs or ~\$113,895 into the process to handle increased volumes of 23.1%.

### IMPROVEMENT SUMMARY

A new Intake Model was created to provide more timely benefits to clients in need. Prior to this new model, there was little consistency in how intakes were scheduled and completed.

Under the new Intake Model, branches use a scheduling board and rotate workers to create heavier and lighter days of intakes and also create maximum open office hours for intakes. By assigning a time frame for the intake interview based on # of programs applied for, asking staff to complete an interview and its associated narration documentation before moving on to another interview, having staff be available throughout the work day, and using a standard narration template, more intakes are being completed and branches are able to stay within same day/next day in offering an interview.

Each branch had a Lean Team spend one week in the office teaching Lean Performance Management concepts that included metrics, visual board and team huddles along with the Intake Scheduling model. The DHS Training Center provided new Narrative Guide training to all staff as branches were implemented. The implementation also was coupled with a temporary effort from Central Office and districts to re-deploy staff to branches with the greatest need to catch up on intakes and ongoing work during the first week of implementation.

There are 64 locations across the state now collecting weekly metrics, using the new intake model and managing using Lean Performance Management Concepts. Customer Satisfaction Surveys are 98.5% positive. General evidence shows increased staff morale, and time to get their work accomplished.

Now that implementation of sites is complete, management has now become responsible for the sustainability of the model. A formal Sustainability Plan has been created and approved to guide this process.

## **BENEFIT/OUTCOME DESCRIPTION**

The largest improvement was increased speed in Oregonians accessing and receiving their benefits. There are also more Oregonians receiving benefits -- as of the current analysis, there has been a 23.1% increase in intakes since October 08. Additional improvements include reduced traffic flow in lobbies, decreased “no show” rates for the intakes, and reduced backlogs, an equalization of workload among staff, and increased client and employee satisfaction. Customer Satisfaction Surveys collected from all branches across the state are 98.5% positive. Respondents to our employee survey find 81% of staff feels the new model is working well.

### **Cost Savings/Productivity**

- **Improved efficiencies with the new intake model will lead to additional time being re-invested into increased availability for growing intake and ongoing processing demands.**
  - With this model, staff are touching an individual case fewer times as more work is done all at once during the time client is present for the intake interview. The need to pend a case for additional verification also has started to decline.
  - Workers are no longer batching their work and saving to complete on protected days, but are learning to process work in smaller time segments in between intakes. Based on ongoing paperwork counts, this is creating efficiencies.
  - Closed the workload gap by 26 FTE, equaling \$113,894.75 per month in workload gap reduction based on the 4.8 efficiency rating.
  - This model has created a 4.8% efficiency rate increase related to total HSS3 duties. One factor is that the use of a new and standard narrative has led to a time savings of 7 minutes per intake interview, which totaled 119,770 minutes in March across all interviews. With 547 HSS3s working in March, this equated to 3.65 hours of time savings per worker that month. Additional factors have contributed to the efficiency gain and associated capacity to handle an increased number of clients, including:
    - Central office staff was redeployed to the field to assist with the workload and help areas get caught up.
    - Some districts redeployed Case Managers to help with HSS3 workload.
    - Some branches utilized a minimal amount of overtime for staff immediately prior to their office being implemented.
    - Work deferred due to increased caseloads cannot go on indefinitely without being addressed.
    - “Expedited intake” training was provided statewide to HSS1s in branches that requested such training. In those branches, the HSS1s are available to do expedited zero income food stamp intakes.
- **Reduced applicant no shows and return trips.**
  - No show rates are currently at 5%; previous no show rates baseline by branches in Districts 5 and 15 in December had 16.39% for District 5 and 26.66% for District 15. Anecdotal comments from reception staff around the state point to quieter lobbies due to fewer return trips, and therefore fewer visits to the lobby, and to clients being seen within minutes of their arrival.

- **Workers are focused on completing the entire process within the intake appointment.**
  - Ongoing Paperwork has declined 38% statewide between late January and mid April. (*With same factors as noted above: redeployment, blitzing, OT, and also a current better understanding of how to accurately complete this metric by branch staff.*)

## People

- **Improved outcomes for consumers and staff.**
  - Across all branches Customer Satisfaction surveys currently show a 98.5% satisfaction rate by clients with the new intake process. There have been more than 4,441 responses entered so far.
  - Staff surveys received from all branches participating in implementation currently reflects that 81% of respondents feel the new intake model is working well. This is with 747 surveys completed and an approximate 50% response rate of those directly working with the model.
    - Worker morale is improving
    - Workers feel more current with their work
    - Workers express feeling less stress as they are dealing with happier customers

## Quality

- **Clear processes and accountability for staff and management.**
  - Staff and processes statewide are being measured with the same metrics
  - Processes related to new intakes are now consistent throughout all SSP offices that provide intakes.

## Service

- **Applicants able to access Food Stamp, Employment Related Day Care, and Medicaid benefits much sooner, with initial intakes done same and next day.**
  - Oregonians are receiving their benefits on average 9 days sooner than prior to implementation of the new Intake model.
  - By branches being able to issue benefits an average of 9 days earlier with this model, the model is infusing ~\$920,000 earlier each month into the local economy, which translates into ~\$1,600,000 in economic activity. This is based on March intakes and the federal SNAP report of economic impact of \$1.00 of food stamps results into \$1.73 entering into the local economy. The SNAP average household benefit of food stamps in Oregon is \$186.00. Receiving their food stamps 29% (9 days) earlier under this model gives the above dollar impact.
  - Food Banks are positively impacted. Many families rely on food boxes while waiting for food stamps. Receiving food benefits 9 days earlier and not needing food boxes for that time period allows food banks to use those savings with other families. Oregon Food Bank reports that for every \$12.00 donated Oregon Food Bank can collect and distribute one food box that lasts 3-5 days. Based on average intakes in March 2009, this is a savings to food banks of \$410,400 per month, allowing the food banks to distribute ~34,220 boxes to families other than those previously receiving them.
- **Commitment to being responsive to consumer expectations on a statewide basis with consistent measurement and accountability to maintaining the model.**

- In all 64 offices, LEAN principles are being embedded into the daily work, and Line Managers are managing the work through metrics.
- Standard metrics are being consistently collected throughout all the offices on a weekly basis.
- 92% of clients are receiving an eligibility interview the same or next day as they come in to apply.
- 65% of clients receive their benefits on the same day as their intake appointment.
- Oregonians can walk into any office across the state and have a very similar consistent experience when applying for program benefits.

## LOGIC DESCRIPTION

- Cost
  - Workload Gap Logic Description: According to the CAF C report, there were 547 HSS3's performing intakes during the month of March, 2009. Between October, 2008 and March, 2009 there was a 23.06% increase in the number of intakes. According to the current time study, 20.4% of an HSS3's time is spent performing intakes, 20.4% of 547 is 112 multiplied by the increase in intakes (23.06%) is equivalent to a 26 FTE closure in the workload gap. Attachments P and JF5, JF6, and JF11. (Avg HSS3 Salary is \$2,939)
  - New Narrative Guide saves 6-8 minutes per narrative based on Springfield Pilot. Using 7 minutes and total of 17,110 intakes done in March (attachment JF6), this is total of 119,700 minutes. 119,700 minutes divided by 547 HSS3's (attachment P noting 2 of these positions are with Child Welfare) = 3.65 hrs per worker.
  - No show rates prior to implementation were baseline from District 5 prior to Springfield Pilot were at 16.39% no show average for year of 2008. District 15 baseline data for December 08 as 26.66% no show rate. See attachment T and Q.
- People
  - Customer Satisfaction Surveys have been utilized by all 64 branches. Customers are given survey at time of intake from their intake worker and asked to complete and turn in before they leave the lobby. So far 4,441 responses have been entered with a 98.5% satisfaction rate. See attachment K.
  - Staff Surveys went out to all people on GroupWise servers for all 64 offices and district staff in each of the 16 districts. 747 surveys were completed. 81% of respondents rated the new model as working well. This is a combination of working very well (36.4%) and working fairly well (44.6%). See attachment N.
- Service
  - Oregonians receiving benefits 9 days sooner is based on information all branches submitted as of January 09. Prior average of 10 days is now averaging 1 day. See attachment S and current statewide intake log reports.
  - \$920,000 sooner into Oregon economy based on USDA/SNAP report that indicates for every dollar in food stamps spent, 1.73 enters the local economy. SNAP report (Website [WWW.FNS.USDA.GOV/PD/19SNAPAVG\\$HH.HTM](http://WWW.FNS.USDA.GOV/PD/19SNAPAVG$HH.HTM)) indicates Oregon average household benefit is \$186.

- Oregon Food Bank Coordinator indicated in phone call that for every 12.00 donated OFB can collect and distribute one food box that lasts 3-5 days. This equates to 2 food boxes per family in those 9 days. The March intakes for the state totaled 17,110. (see JF3). Two food boxes x total intakes is 34,200 food boxes and \$410,400 in savings Oregon Food Bank can distribute to other needy Oregonians.
- 92% of clients receiving eligibility interview same or next day and the 65% of clients receive their benefits on the same day both come from Intake Log History collected from the 64 sites. See attachment U.

**ATTACHMENTS:**

FOOD STAMP CERTS/RECERTS REPORTS BY JEFF THARP- EXCEL FILE (**DOCUMENT JF2**)

STATEWIDE C REPORTS FOR MONTHS OF OCT 08, FEB 09 AND MARCH 09 (**DOCUMENT P**)

USDA S.N.A.P. WEBSITE- [WWW.FNS.USDA.GOV/PD/19SNAPAVG\\$HH.HTM](http://WWW.FNS.USDA.GOV/PD/19SNAPAVG$HH.HTM)

OREGON FOOD BANK - [WWW.OREGONFOODBANK.ORG/MAKE\\_A\\_DIFFERENCE/DONATE\\_FUNDS/2](http://WWW.OREGONFOODBANK.ORG/MAKE_A_DIFFERENCE/DONATE_FUNDS/2)

HSS3 PAYROLL AVERAGES INCLUDING BENEFITS FROM DHS HUMAN RESOURCES (**DOCUMENTS C AND O**)

CUSTOMER SATISFACTION SURVEY (**DOCUMENT K**)

STAFF SURVEY (**DOCUMENT N**)

DATA REPORTS SUMMARY-MAY 29, 2009 (**DOCUMENT U**)