County of San Diego

# San Diego Health and Human Services Agency

Client Services Improvement Project

**Strategy and Plan**

Presented by

inTelegy

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## Summary of Assessment Findings

## Summary of Assessment Finding

An assessment was presented on December 5 detailing the current strengths and challenges of the customer service delivery model through the ACCESS Center and FRCs.
Summary of Findings:

- Client satisfaction surveys indicate clients do want to use ACCESS call center due to convenience and quality of service.
- San Diego County is delivering a simple and accessible customer experience by way of the "no wrong door" policy and multiple access points however many challenges exist;
- ACCESS
  - Insufficient trunking resulting in 350,000+ hang-ups per month
  - Call service levels are low; 24% abandonment of call and average wait time of +30 minutes
  - Staffing levels are not sufficient to handle current or projected "should be" call volumes- between 20% and 35% below required to handle call volumes within acceptable service levels
  - Technology does not support an efficient flow of work within ACCESS and between ACCESS and FRCs
- FRC
  - Clients are unintentionally encouraged to walk into FRC - "All roads lead to the FRC"
  - There is no centralized and robust task tracking tool: Each FRC and each task unit within the FRC have 'home grown' tracking tools that are all excel based
  - Lobby Lines are long, directions are confusing, there is no automated check in, EW notification or auto receipts of documents

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## Summary of Assessment Findings

Overall Organizational Challenges

- Operational processes require **too many hand offs** to effectively offer the customer either:
  - 1st call resolution; Sharepoint hand off to FRCs (16.5%), 211 transfers back to ACCESS
  - 'No Wrong Door' process to clients but work still transferred by zip code between FRCs
- Imaging delay and receipt requirements at the FRC encourage clients to call, email and return visit to an FRC
- Organization is not prepared for the online application processing and remote benefits issuance
  - Online applications (BCW) and IVR self service is not well publicized and slower operational processes make this a less desirable channel for customers
  - Phone interviews not currently the default method for conducting CalFresh Intake, RRRs or CalWORKs RRR interviews
- There is no evidence of a joint technical plan to support the current service delivery model, operational needs of ACCESS or the FRC's or requirements of a future 'online' service delivery model. Technology solutions are insufficient for the size of HHSA and not pro-actively anticipating the needs of the organization

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## High Level Recommendations

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## Future Model Recommendations

**Customer Experience:**

1. Re-allocate resources to eliminate operational hand offs; connect process and technology stand alone initiatives into a single view of the desired customer experience

**Technology:**

1. Install additional phone lines/trunks (along with staff requirements) to receive all client calls
2. Implement a task management tool across ACCESS and FRCs
3. Implement document imaging at the point of entry
4. Implement other call center related technologies to improve the client experience: lobby management kiosks, email management, workforce management for phone staff scheduling

**Operations:**

1. Increase and allocate staff according to the staffing model assignments and organizational chart positions
2. Migrate work force to flexible work assignments based on customer need vs. task specialization. Phone support staff will do tasks 30% of available time, call handling 70% of time.
3. Revise processes to minimize customer hand offs: e.g. Sharepoint requests, 211 transfers back to ACCESS, zip code allocation of work, BCW applications into task distribution process assigned across all offices
4. Streamline operational reporting to clarify the customer experience and variables impacting that experience; resources, volume of work, channel of access and predictive analytics
5. Drive customer behaviors towards non face to face channels (phone, email, web.) Staff and build processes to support non face to face channels; simple phone interviews and standardized application processing regardless of channel.
6. Improve in person experience in FRC lobbies by adding self-help technologies, improving overall lobby flow and customer interaction with lobby signage, staff and technology.
7. Migrate Intake process to full task model with interviews scheduled centrally and assigned as tasks; emphasis on inbound/outbound **phone** interviews for CalFresh applications and CalWORKs & CalFresh RRRs

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## Summary of Recommendations:
### Current vs. Future State Changes

| Current | Recommended/Future |
|---|---|
| **Customer Experience** | |
| • Insufficient staff to answer the telephone - 59<br>• Insufficient phone line capacity, customers receive call back notification – 142 trunks<br>• Clients experience 30+ minute hold time<br>•26,804 calls answered live | •Increase phone staff FTE to 110<br>•Increase phone lines (trunks) to 192-226 (depends on use for interviews)<br><br>•Reduce average (80%) client wait time at ACCESS to 60 seconds<br>•Eliminate busy message; answer approximately 56,028 calls live |
| **Process and Operations** | |
| •Hand offs and wait times inadvertently encourage clients to visit the FRC's;<br>•Long wait time and lines at FRC<br>•Document drop off and lost/not available docs require return visits<br>•Face to face interviews for Cal fresh the standard | •ACCESS staffed to also handled allocated tasks, 70% phone, 30% task (45 FTE)<br>•Staff specialization minimized; work assigned across all offices to staff using TMT tool based on client need<br>•Process built to reduce hand offs-<br>•Eliminate Sharepoint tasks<br>•BCW apps processed as task; all apps processed the same regardless of channel received<br>•Imaging at FRC's-eliminate lag time in process<br>•Phone interviews become the standard for CF Intake and RRR and CW RRR, with inbound phone call an option to reduce appointment re-scheduling |
| **Technology** | |
| Task assignment allocated locally through home grown excel workbooks maintained by supervisors.<br>Document imaging delay<br>Workload is supported by many manual processes not sufficient for a county the size of San Diego:<br>•Email response and tracking<br>•Task allocation and reporting<br>•Lobby lines<br>•Staff scheduling | Universal task management tool built (custom) to allocate tasks to next available worker<br>Documents imaged when and where they are received.<br>Workload supported by technology to improve customer experience, staff efficiency and management visibility;<br>•Automated email management<br>•Universal task management<br>•Kiosks and lobby management software<br>•Workforce management tool |

## Detailed Recommendations

Needs-Based Customer Experience

Operational Processes

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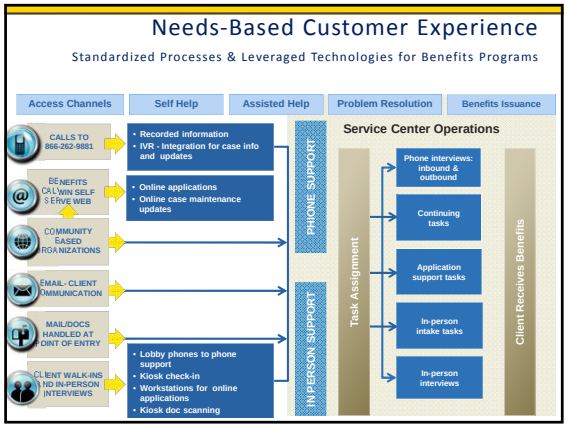
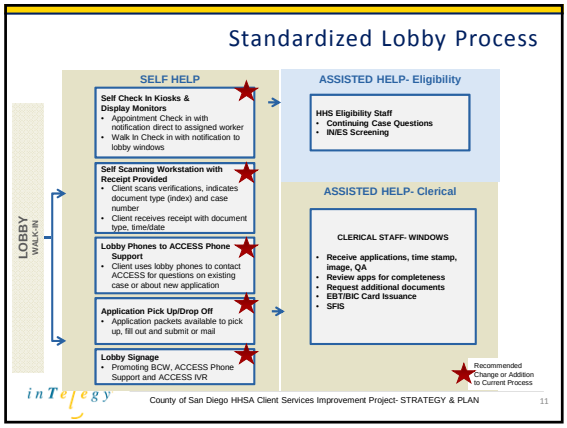

Needs-Based Customer Experience
Standardized Processes & Leveraged Technologies for Benefits Programs
Access Channels
Self Help
Assisted Help
Problem Resolution
Benefits Issuance
CALLS TO 866-262-9881
BENEFITS CALWIN SELF SERVE WEB
COMMUNITY BASED ORGANIZATIONS
EMAIL- CLIENT COMMUNICATION
MAIL/DOCS HANDLED AT POINT OF ENTRY
CLIENT WALK-INS AND IN-PERSON INTERVIEWS
• Recorded information
• IVR - Integration for case info and updates
• Online applications
• Online case maintenance updates
• Lobby phones to phone support
• Kiosk check-in
• Workstations for online applications
• Kiosk doc scanning
PHONE SUPPORT
IN PERSON SUPPORT
Service Center Operations
Task Assignment
Phone interviews: inbound & outbound
Continuing tasks
Application support tasks
In-person intake tasks
In-person interviews
Client Receives Benefits


Standardized Lobby Process
LOBBY
WALK-IN
SELF HELP
Self Check In Kiosks & Display Monitors
• Appointment Check in with notification direct to assigned worker
• Walk In Check in with notification to lobby windows
Self Scanning Workstation with Receipt Provided
• Client scans verifications, indicates document type (index) and case number
• Client receives receipt with document type, time/date
Lobby Phones to ACCESS Phone Support
• Client uses lobby phones to contact ACCESS for questions on existing case or about new application
Application Pick Up/Drop Off
• Application packets available to pick up, fill out and submit or mail
Lobby Signage
• Promoting BCW, ACCESS Phone Support and ACCESS IVR
ASSISTED HELP- Eligibility
HHS Eligibility Staff
• Continuing Case Questions
• INIES Screening
ASSISTED HELP- Clerical
CLERICAL STAFF- WINDOWS
• Receive applications, time stamp, image, QA
• Review apps for completeness
• Request additional documents
• EBT/BIC Card Issuance
• SFIS
Recommended Change or Addition to Current Process
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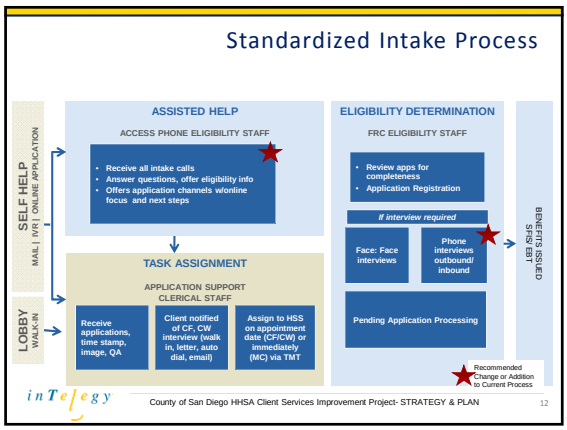
Standardized Intake Process
SELF HELP
MAIL | IVR | ONLINE APPLICATION
LOBBY
WALK-IN
ASSISTED HELP
ACCESS PHONE ELIGIBILITY STAFF
• Receive all intake calls
• Answer questions, offer eligibility info
• Offers application channels w/online focus and next steps
TASK ASSIGNMENT
APPLICATION SUPPORT CLERICAL STAFF
Receive applications, time stamp, image, QA
Client notified of CF, CW interview (walk in, letter, auto dial, email)
Assign to HSS on appointment date (CF/CW) or immediately (MC) via TMT
ELIGIBILITY DETERMINATION
FRC ELIGIBILITY STAFF
• Review apps for completeness
• Application Registration
If interview required
Face: Face interviews
Phone interviews outbound/ inbound
Pending Application Processing
BENEFITS ISSUED
SFIS/ EBT
Recommended Change or Addition to Current Process
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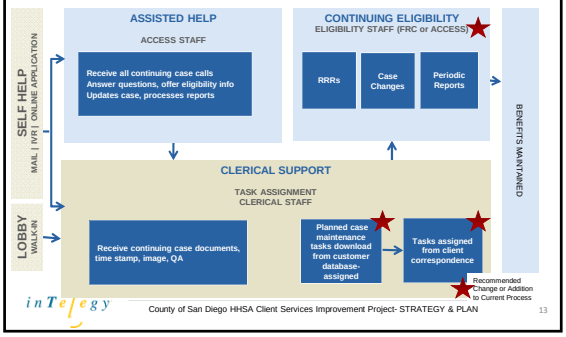
## Standardized Continuing Case Management Process

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## Organization Recommendations

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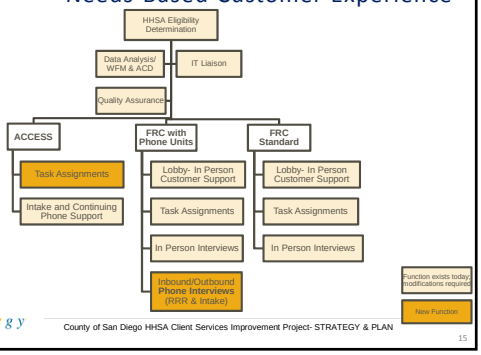
## Functional Organization to Supporting the Needs-Based Customer Experience

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## Position Requirements in Needs Based Model

- HHSA Eligibility Determination
  - Shared accountability using universal reporting; monitoring of overall customer satisfaction
- IT Liaison
  - Ensure proper functioning of service center technology including ACD, TMT and other support technologies. Work with IT to get support needed.
  - Coordinate strategic planning to identify operational recommendations to increase efficiency across all programs
- Supervisors
  - Manage individual and unit productivity through use of daily, weekly and monthly reporting
  - Ensure equal distribution of workload within unit to maintain outcome measures
  - Manage staff schedule and schedule adherence
  - Ensure proper use of technology tools and request support when needed
- Data Analysis
  - Manage reporting to include data from CalWIN, ACD, IVR, Task Management, Appointment Management, WFM and Call Recording and payroll data. Reports to deliver metrics on both the customer experience and operational efficiency
  - Create and deliver weekly and monthly dashboards across all programs
  - Manage Staff scheduling software (WFM) and deliver staff schedules that meet the demands of the client through use and analysis of historical trends in volumes.
- Quality
  - Manage quality programs and work with Supervisors to ensure proper use of quality technology.
  - Consolidate and report quality measurements to management.



## Staffing Model Assumptions

| Sept 2011 | Medi-Cal | CalFresh | CalWORKs | CAPI | Total | % increase assumptions used |
|---|---|---|---|---|---|---|
| Applications/Month | 6,785 | 10,560 | 6,782 | 23 | 24,250 | OT 18%, MC 6%, CW 0% |
| Granted Cases | 129,078 | 76,445 | 31,748 | 247 | 237,500 | |

| | ACCESS | FRC | Total | % growth since 2009 |
|---|---|---|---|---|
| Sept 2009 Actual Staffed* | 72 (no ERA client at that time) | 769 | 841 | |
| Sept 2011 Actual Staffed* | 84 (76 w/out ERA included) | 753 | 837 | -5% |

**Business Model Assumptions**
- Call volume to 211 maintained; Call backs from 211 are eliminated
- "Sharepoint" transfers to FRC are eliminated
- BCW applications are handled in a task based model just as any other application type
- Client email projected increase from today's volume by 20% in 2013 then and additional 13% in 2014 -2015

**70/30 definition**
- ACCESS Phone staff will be assigned responsibilities that include task assignments. Assumption that 70% of an average day is scheduled phone coverage and 30% is task work. Task work assumed to be case change and periodic report related tasks

**Staffing Model Inputs**
- Staffing model based on case and applicaton projections, tasks related to cases/applicatons, projected call volumes and task handle times based on input from San Diego staff
- Call handle time assumption of 11 minutes average

**Clerical Assumptions**
- Clerical staffing based on assumption that some task types will not require manual input into TMT; clerical responsibilities in general duties and lobby will remain the same
- Assumptions included document imaging at the point of entry in all FRCs and TMT task assignment duties:
  - The majority of the tasks will be auto generated and auto assigned by the TMT Application; the exceptions to the auto generation and assignment are pending application tasks and Changes.: 150% of the pending task volume will require clerical creation and assignment; 50% of the change task volume will require clerical creation and assignment
- General Clerical Support to FRCs: There are also 31 fixed Clerical Staff in the model (Mailroom, supplies, Lobby Ambassador)
- MIC clerical includes existing 12 FTE plus projection for additional to cover projected increase in mail in/ BCW and mail in verifications



## ACCESS Volumes and Projections

| | Sept 2011 237,500 Granted Cases 24,250 Apps/Month | | Jan 2013- based on growth |
|---|---|---|---|
| **Measurement** | **ACCESS Current Results** | **Projections** / Month- Current** | **Projections-/month Jan 2013** based on growth projections |
| **Attempts** | **406,311** | **0** | |
| **Calls Offered** | **67,657** | **86,378** | **94,964** |
| *Calls/Case Ratio* | *.26* | *.33* | *.33* |
| **Calls Answered Live** | **26,804 (40%)** | **50,963 (59%)** | **56,028** |
| **Abandoned** | **16,036 (24%)** | **4,319 (5%)** | **4,749** |
| **Answered by 211** | 10,058 (15%) | 12,957 (15%) | 14,245 |
| **Transferred Out** | 2,907 (4%) | 3,455 (4%) | 3,798 |
| **Self Serve** | *11,852 (17%)* | *14,684 (17%)* | *16,144* |

*unduplicated case count
**Projections assume adequate trunking capacity to accept all calls from client base

## HSS & Clerical Staffing Model Analysis based on 2013 case growth assumptions

| ACCESS HSS Staff Requirements | | |
|---|---|---|
| | January 2013 | |
| Phone FTE | 110 | |
| PubAssist | 3 | |
| 30% Task FTE | 45 | |
| Total | 158 | |
| | Sep 2011 | |
| Current Staff | Budgeted | Actual |
| ACCESS HSS | 85.2 | 84 |

| FRC HSS Staff Requirements | | |
|---|---|---|
| | January 2013 | |
| Application Processing | 231 | |
| Pending | 38 | |
| Change | 371 | |
| RRR | 158 | |
| Periodic Rpt | 59 | |
| Total HSS FTE | 857 | |
| | Sep 2011 | |
| Current Staff | Budgeted | Actual |
| FRC- not including METRO | 776 | 753 |

| Clerical Staff Requirements | | |
|---|---|---|
| | January 2013 | |
| Intake/Pending | 129 | |
| Continuing Support | 153 | |
| TMT/POE Imaging | 40 | |
| MIC- Expanded | 42 | |
| **Total** | **364** | |
| | Sept 2011 | |
| Current Clerical Staff | Budgeted | Actual |
| ACCESS | 20 | 17 |
| MIC | 12 | 12 |
| FRCs | 274 | 248 |
| Total | 306 | 277 |

| HSS Supervisor Requirements - does not included corrective action supervisor admin/doc coordinators | | |
|---|---|---|
| | January 2013 | |
| ACCESS | 19 | |
| FRC | 83 | |
| Total | 102 | |
| | Sep 2011 | |
| Current Staff | Budgeted | Actual |
| ACCESS HSS Supervisors | 8 | 8 |
| FRC HSS Supervisors | 114 | 111 |
| Total SHSS (Supervisors) | 122 | 119 |



## New Business Model Training Plan

- All Staff- Task Management Tool
  - Typical training requirement would include 1.5 hour classroom/lab with on the job support following.
- HSS Staff- Process
  - Revised intake and continuing processes
  - Call Handling
  - Interview skills- phone and face to face
  - Operations, Goals and Expectations
  - Quality Processes
- Supervisors and Management
  - Metrics Management
  - Quality Management
- Clerical
  - Lobby Processes
  - Kiosk functionality and operation
  - Appointment Management tool
- Staged Training
  - Train HSS staff on the required training in a staged training cycle to ensure proper coverage of normal business while staff is trained on new technology and processes.
- Projected Training Time Required
  - HSS- 2.5 days total
  - Supervisors= 2 days total
  - Clerical- 2 days total



## Technology Overview

Technology Requirements

Budget Requirements

## Technology Assessment Overview

- Technology to support the ACCESS Call Center and the FRC does not support an efficient operation. Workflow is mostly manual.
  - The phone system and ACD are adequate for the current scope and scale of ACCESS
  - Insufficient trunking (phone lines in)
  - Task management is the foundation to a task based system; current tools are not meeting basic task management requirements.
  - Email offered to the client with no email management software.
  - Imaging at the point of entry is needed at FRCs for 'real time' document management. Lost and delayed documents 'create' work and frustrate clients.
  - Available reporting does not tie the customer experience channels together, report on key productivity metrics or support predictive analytics needed for management action
  - Lobby Management could be significantly improved with technology solutions; check in kiosks, appointment notification, scheduling software

Technology:

1. **Install additional phone lines/trunks (along with staff requirements) to receive all client calls**
2. **Implement a task management tool across ACCESS and FRCs- Build or Borrow options**
3. **Implement document imaging at the point of entry**
4. **Implement other service center related technologies to improve the client experience:**
   - **Lobby management kiosks**
   - **Email management**
   - **Dialer technology for automated outbound calls**
   - **Workforce management for staff scheduling**



## Trunking Analysis and Recommendation

Current Structure
- 6 T1 PRI = 142 Trunks in use by 211, Self Service and ACCESS client calls
- Trunk Requirement

| Given Parameters | Interview Call back | Inbound Calls | Comments |
|---|---|---|---|
| Calls Per Month: | 6,000 | 86,000 | |
| Length of Call | 1200 | 405 | Expressed in seconds |

| Assumptions | Values | Values | Comments |
|---|---|---|---|
| Blocking Factor | 1% | 1% | (Percentage of calls during busy hour that are blocked) |
| Busy Hour factor | 1.5% | 1.5% | (Percentage of calls that arrive during the busiest hour of the month) |
| Average Wait | 75 | 75 | Expressed in seconds |

| Busy Hour Calculations | Values | Values | Comments |
|---|---|---|---|
| Calls during busy hour | 90 | 1290 | Busy hour factor * Calls per month |
| Length of call | 1275 | 480 | Average Wait + Length of Call |
| Busy Hour Traffic | 114750 | 619200 | Busy Hour Calls * Length of Call **(In Seconds)** |
| Busy Hour Traffic | 32 | 172 | Busy Hour Calls * Length of Call **(In Erlangs)** |
| **Trunks Needed:** | 44 | 192 | Using the Erlang-B Calculations |
| Trunks Needed Combined: | | 226 | Efficiency gained when combining both requirements together |

- Interview calls assumes a 60% reach rate, 40% of phone interviews requiring inbound call back from client
- One erlang is the equivalent of one call (including call attempts and holding time)
- Busy hour projection based on experience at other county service centers using real data on the busiest hour on a typical high call volume day (Tuesday at the beginning of the month after a Monday holiday).



## TMT Solutions Used at Other Counties

| | San Mateo | Santa Cruz | Placer | Santa Clara | Tulare | Santa Barbara | Sacramento | Orange |
|---|---|---|---|---|---|---|---|---|
| **Programs** CO = Continuing IN = Intake | CO: MC,CF | CO/IN: MC, CF, CW, FC | CO/IN: MC, GR, CW, CF | CO/IN: MC, CF, GA, CW | CO: MC,CF | CO: MC, CF | CO: MC | CO: MC, CF |
| **Task Solution** | Northwoods Compass | Strataframe ASP .NET | ASP .NET, C# | CA Service Desk | Proprietary ASP .NET | Visual Basic | Proprietary ASP .NET | Proprietary ASP .NET, C# |
| **Reporting** | Compass | MS SQL Reporting | MS SQL Reporting | Business Objects | MS SQL Reporting | Crystal Reports | MS SQL Reporting | Crystal Reports, BO |
| **Agency-Wide** | Underway | TBD | Yes | Yes | No | No | No | No |
| **End-to-End** | TBD | TBD | Yes | Yes | TBD | TBD | TBD | No |
| **User-Aware** | TBD | No | Yes | No | No | No | Yes | Yes |
| **Imaging Integration** | Yes | No | Yes | No | No | No | Yes | No |
| **Scheduling** | Yes | No | No | No | No | No | No | No |
| **Self Check-in** | No | No | No | Yes | No | No | No | No |
| **CalWIN /CIS Upload** | Yes | No | Yes | Yes | Yes | Yes | Yes | Yes |
| **Auto-Assign** | Partial | No | Yes | No | Yes | No | Yes | Planned |
| **Equalization** | TBD | No | No | No | No | No | No | Planned |
| **Dialer Support** | TBD | No | Yes | No | No | No | No | No |

## Document Imaging at the Point of Entry

Current Situation

- The majority of documents that need to be imaged are dropped off at the FRC.
- A receipt is given, but the documents go into a basket to be imaged at a later time
- Delay in getting the documents imaged and accessible by ACCESS causes unnecessary calls, return trips to the FRC, and duplicate submissions

Recommendation

- Install scanners at each FRC lobby
- Clerical staff that issue receipts today image the document prior to issuing the receipt
- Additionally, enable self-scanning and auto receipt through lobby self-help technology



## Items to be Budgeted

| Budget Category | High Level Assumptions | Budget Examples |
|---|---|---|
| **Telephony** | Current ACD used by the ACCESS center and can be extended to cover ACD users at regional offices | Voice, Chat, Email licenses are $1,250 for first license and $250 for each service additional license |
| **- Telesets** | Voice is deployable through existing phone system to; Intake Phone Support could be at any office | Professional Services required to scope costs and perform integration and configuration to extend ACD to one or more FRCs |
| **- Auto Dialer** | Tool that automates calls to client for appointment notification and reminder | Usually available with ACD implementation |
| **- Predictive Dialer** | Places an outbound call and transfers the call to a live when the client acknowledges the call. Predictive dialers use statistical algorithms to minimize the time that workers spend waiting between conversations, while also minimizing the occurrence of someone answering when no worker is available. | About $1,000/user, Concurrent<br>Additional hardware and professional services may be required; Need to define operational plan to determine |
| **Email Management** | Off the shelf database tool that manages inbound emails as the ACD manages inbound calls. Routes, tracks and performs closed-loop tracking on all client emails. Can be linked with Task Management tool for assignment of email as a task | $20,000-$50,000 range based on complexity and volume. |



## Items to be Budgeted

| Budget Category | High Level Assumptions | Budget Examples |
|---|---|---|
| **Workforce Mgmt** | Would require integration with ACD, and initial configuration (Professional Services), user training (Administrators), user licenses (admin and all supported staff) | One Time Costs $50,000-$80,000<br>Licensing $1,000 concurrent<br>Training<br>Professional Services |
| **Self Check-in** | check-in kiosks or touch screen terminals running custom software are two possible options | Example Self Check-in kiosks are $6,000/ea;<br>Software to drive overhead displays is $4,000 per lobby |
| **Document Imaging** | Additional scanners and scanning, capture software required to implement scanning in FRC lobbies | $1,000-$5,000 per scanning station based on speed and size of scanners |
| **Self Scanning** | Scanning at the point of client entry to lobby via self-help workstation or kiosk | Example Self Scanning kiosks are $12,000/ea |
| **Lobby BCW** | Kiosks or workstations are possible options for Lobby BCW hardware; Connectivity to Internet required; | $500 to $1,000 per workstation including furniture and security |
| **Task Mgmt Tool** | Custom built solution that links all FRC and ACCESS built in a complex database tool and easy to use UI, standard for all FRC/ACCESS. Custom and Developed reporting. | Project management, professional services and licensing (potentially) - for all staff |

## Technology Overview

| ACD License Impact | | | | | | | |
|---|---|---|---|---|---|---|---|
| | ACCESS HSS | ACCESS SHSS | 211 | Other ACCESS Overflow sites | FRC Interview Group- | FRC Interview Group- Sup | Total |
| Current ACD Licenses | 69 | 7 | 10 | 10 | 0 | 0 | |
| Additional ACD Licenses at 70/30 | 86 | 8 | -3 | 0 | | | |
| Interviews (assumes group does both F2F and Phone) | | | | | 88 | 9 | |

| Call Recording Impact | | | | | | | |
|---|---|---|---|---|---|---|---|
| | ACCESS HSS | ACCESS SHSS | 211 | Other ACCESS Overflow sites | FRC Interview Group- | FRC Interview Group- Sup | Total |
| Current Witness Licenses | 69 | 7 | 10 | 10 | 0 | 0 | |
| Additional Licenses at 70/30 | 86 | 8 | -3 | 0 | | | |
| Interviews | | | | | 88 | 9 | |

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## Technology Overview

| Workforce Management Impact | | | | | | |
|---|---|---|---|---|---|---|
| | ACCESS HSS | ACCESS SHSS | Other ACCESS Overflow sites | FRC Interview Group- | FRC Interview Group- Sup | Total |
| Current WFM Licenses | 0 | 0 | 0 | 0 | 0 | |
| Additional Licenses at 70/30 | 155 | 15 | 0 | 0 | 0 | |
| Interviews | | | | 0 | 0 | |

| Task Management Tool | |
|---|---|
| | 70/30 |
| Current Users | 0 |
| FRC Users | 1023 |
| ACCESS Users | 185 |
| Total | 1,208 |

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## Technology Timeline Considerations During Design and Build Process

**Step 1:** Develop Business Requirements for technology tools required
- All technologies
- TIMELINE: BRD development process months 1-2

**Step 2:** IT to identify potential vendors and plan for proposals based on BRD
- TIMELINE: month 3

**Step 3:** IT to do document technical requirements based on BRD and in preparation for technology implementation
- TIMELINE: month 3

**Step 4:** Technology Selection and Procurement
- TIMELINE: months 4-5

**Step 5:** Technology Implementation and Customization
- TIMELINE: months 6-7

**Step 6:** Technology Testing and Training
- TIMELINE: months 8-9

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## Design & Implementation Plan

Timeline for implementation
Committee structure
Budget requirements

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## Timeline Recommendations

- Stage 1
  - Implement changes at ACCESS and those FRCs designated at Inbound/Outbound phone interview locations.
    - Allows for required time to retrain all staff on processes and on new technologies (especially TMT)
    - Smaller launch enables quick changes or modifications to be made before full roll out
- Stage 2
  - Roll out process and technology changes to all remaining FRCs

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## Key Design and Build Milestones

| | Key Milestone | Target Date |
|---|---|---|
| Stage 1 | Assessment Delivered to Executives and Managers | Completed |
| | Strategy and Plan Draft Delivered | Completed |
| | Design and Build Process Kick Off | Completed |
| | Strategy and Plan Delivery to Staff | Completed |
| | Design and Build Committees Operational | March |
| | ACCESS and FRC Future Staffing Levels Approved | Completed |
| | Technology Requirements Finalized and Programming or Procurement Starts | April 15 |
| | Technology/Infrastructure Requirements and Procurement Starts | June 15 |
| | TMT Development and UAT Complete | Aug 30 |
| | Other Technology Testing and Implementation Complete | Aug 30 |
| | Lobby Redesign Complete in Stage 1 FRC (s); Imaging at Point of Entry – all FRCs | Aug 30 |
| | Stage 1 FRC and ACCESS Staff Trained in new processes and technology; moved if required | Oct 19 |
| | TMT Task Distribution in ACCESS Center and Stage 1 FRC(s) | Oct 24 |
| | ACCESS Process redesign launched; FRC Phone Units for Inbound/Outbound Phone Interviews Implemented- Stage 1 FRC(s) | Oct 24 |
| Stage 2 | Lobby and Process Redesign Complete in all remaining FRC subject to space avalibility | Mar 2013 |
| | Stage 2 FRC Staff Trained in new processes and technology | Mar 2013 |
| | **Stage 2 FRC Launch** | **April 2013** |

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## Customer Experience Impact Objectives

| Objective | *Projection* | Month 1-3 | 4-6 | 7-9 | 10-12 |
|---|---|---|---|---|---|
| Forecasted Case & Applications | *Projected Growth by Program* | | | | |
| Forecasted Call Volumes | *Calls/Case-App Ratio of .33* | | | | |
| Average Call Handling | *11 minutes* | | | | |
| Average speed of answer decreased | *From 30 minutes to 1 minute* | | | | |
| Call Service Level increased (SL= 80% calls answered in 60 seconds) | *80% in 60 seconds* | | | | |
| Online Applications increased | *25%* | | | | |
| Lobby Traffic decreased | *25%* | | | | |
| | | | | | |
| Customer Satisfaction | *Maintain or improve to 80% satisfied* | | | | |
| Employee Satisfaction | *Maintain or improve to 80% satisfied* | | | | |

Recommended Measurements



## Design and Build Committee Structure

| Committee | San Diego Design and Build Committees Responsibilities | Participation | Meeting Frequency/ Duration |
|---|---|---|---|
| **Executive Oversight** | • Stewardship of the overall project<br>• Approval of key design decisions as requested by Steering<br>• Budget Approval | • Agency Director<br>• Chief Operating Officer<br>• Director, Strategic Planning and Operational Support<br>• Deputy Director, East and North Central Regions<br>• Deputy Director, Central and South Regions<br>• Deputy Director North Coastal and North Inland Regions<br>• Group Information Technology Manager | Once a Month<br>1 hour |
| **Steering** | • Review and approve committee work products<br>• Provide cross committee communication<br>• Provide Executive Oversight Presentation Material<br>• Outcome Measures<br>• Dashboard Development<br>• Training Requirements and Training Plan<br>• (Curriculum customization via Staff Development resources) | • Leads of each of the Committees<br>• ACCESS Manager<br>• Staff Development Manager<br>• Regional Managers | Twice a Month<br>2 hours |



## Design and Build Committee Structure

| Committee | San Diego Design and Build Committees Responsibilities | Participation | Meeting Frequency/ Duration |
|---|---|---|---|
| **FRC Ops/Lobby** | • Design Goals<br>• Intake process diagrams for all application & interviews types<br>• Lobby Traffic Management Processes and Procedures<br>• Staffing Requirements, HSS, SHSS, Clerical Staff and Sups for Task Work, Task Creation and Assignment, Imaging, Mail, Phone/ F2F Interview Group.<br>• Organization Structure, Roles and Responsibilities<br>• Task Tracking Requirements, UAT Testing and Implementation<br>• Technology Business Requirements for Check In, Appointment Scheduling, Notification, Window Management, Imaging<br>• Lobby Signage<br>• Facility Requirements<br>• Reporting Requirements | • Lead – FRC Manager<br>• 2 FRC Managers<br>• 4 FRC Supervisors<br>• 2 FRC HSS Staff<br>• Clerical Supervisor<br>• 2 Clerical Staff<br>• Facility Manager | Twice a Month<br>2 hours<br>Out of meeting work as required |
| **ACCESS Center** | • Process Diagrams for Call<br>• Phone/Task Work Ratio- define task work that ACCESS staff will do.<br>• Staff Requirement for HSS, SHSS, Clerical Staff and Sups for Phone, Task Work, PubAssist, 211 Integration<br>• Organization Structure, Roles and Responsibilities<br>• Task Tracking Requirements, UAT Testing and Implementation<br>• Business Requirements for WFM<br>• Reporting Requirements and Implementation – Call Handling, Task Work, PubAssist, 211, WFM, Call Review<br>• Define and Implement Individual Productivity Management Processes<br>• PubAssist Processes and Marketing<br>• Training Requirements<br>• Facility Requirements | • Lead – ACCESS Supervisor or Manager<br>• 3 ACCESS Supervisors<br>• 2 ACCESS Call Agents<br>• Clerical Supervisor<br>• 2 Clerical Staff<br>• ACD/ Reporting Analyst<br>• Facility Manager | Twice a Month<br>2 Hours<br>Out of meeting work as required |

## Design and Build Committee Structure

| Committee | San Diego Design and Build Committees Responsibilities | Participation | Meeting Frequency/ Duration |
|---|---|---|---|
| TMT | • Gap Analysis of current product/plan and High Level Requirements<br>• Project Planning to fill any gaps<br>• Detailed Requirements<br>• Functional Specifications<br>• UAT Management<br>• Implementation and Change Control | • Lead<br>• 2 IT Staff<br>• 2 ACCESS Supervisors ( At least 1 the same as on the ACCESS Committee)<br>• 2 FRC Supervisors (At least 1 the same as on the FRC Committee)<br>• Clerical Supervisor (Same as FRC Committee)<br>• 2 Clerical Staff | Twice a month<br>2 hours<br>Out of meeting work as required |
| Technology | • Telephony Requirements and licenses<br>• WFM Requirements, RFP, ROI and Vendor Selection<br>• Auto Dialer Requirements, ROI and Vendor Recommendation<br>• Kiosk Requirements, ROI and Vendor Recommendation<br>• Email Management Requirements, ROI and Vendor Selection<br>• Reporting Delivery | • Lead – IT<br>• 3 IT Staff<br>• 1 ACCESS Supervisor<br>• 1 FRC Supervisor (Same as Lobby Committee)<br>• 1 Clerical Supervisor | Twice a month<br>1.5 hours<br>Out of meeting work as required |
| Communication | • Communication Master Strategy<br>• Employee Pre and Post Surveys<br>• Client Pre and Post Surveys<br>• CBO Liaison and Communications<br>• Employee and Client Communications | • Lead – FRC Manager or Marcom Manager<br>• 1 ACCESS Supervisor<br>• 2 ACCESS HSS Staff<br>• 2 FRC Supervisors<br>• 2 FRC HSS Staff | Twice a month<br>1.5 hours<br>Out of meeting work as required |



## Project Risks

- Focus :
  - Staged implementation not supported under proposed InTelegy contract
  - Conflicting initiatives or priorities could drain management resources from focus on this change
  - Executive Management focus on long term operational initiatives
- Organizational concerns over staff re-allocation; managerial oversight
- Technology resources and expertise
- Budget