Prince William County, Virginia

No Wrong Door Human Services Solution Study

Recommendations and Implementation Plan

December 3, 2018

PCG Human Services
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REVISION HISTORY

Version Number	Release date	Notes
v1.0	10/12/2018	Initial submission of combined Recommendations and Implementation Report to Prince William County
v2.0	11/28/2018	Resubmission incorporating feedback from County
v3.0	12/3/2018	Resubmission incorporating additional feedback from County

INTRODUCTION

Prince William County (the County) partnered with Public Consulting Group (PCG) at the beginning of 2018 to conduct the *No Wrong Door (NWD) Human Services Solution Study.* PCG was responsible for analyzing the service delivery and customer experience across the seven state or county agencies that provide human services in the County, including:

- Area Agency on Aging ("AAA")
- Community Services Board ("CS")
- Department of Juvenile Justice Court Service Unit ("CSU")
- Department of Social Services ("DSS")
- Office of Housing and Community Development ("OHCD")
- Prince William Health District ("PWHD")
- Virginia Cooperative Extension ("VCE")

As a part of this seven-month study, PCG has examined data, conducted on-site observations, mapped the client experience, conducted leadership and staff interviews, led focus groups and white-boarding sessions, conducted surveys, and researched local and national best practices to identify and recommend ways to improve accessibility of services regardless of entry point and develop a plan to implement these recommendations. This document builds upon prior deliverables, particularly the Current Challenges report and the Recommendations report, to provide a roadmap for the County to implement strategies to improve the customer experience.

Goals

Figure 1. Project goals, incorporated across all recommendations.

The County's Vision, Values, Beliefs and Expectations document includes the County's vision statement, which calls for the County to "do the right thing for the customer and community every time." This document also includes the expectation that County leadership will "communicate and collaborate at all levels," and cites teamwork among the County's core values. This concept of collaboration that drives improvements to customer service is the foundation of the development of a new business model going forward, which seeks to help the County improve service delivery by enhancing client access to services and their experience with county agencies. The County wants to ensure that customers receive a consistently high level of service regardless of the agency in which they first receive services, and that customers do not have to repeatedly enter county agencies to receive the same or different services. In order to realize these objectives, the County and PCG have identified five specific goals that guided the formation of the recommendations presented in this report.

Goal 1: Increase Integration and/or Alignment of Services to serve each individual or family holistically and in a streamlined fashion. Clients are often receiving or in need of multiple services and the County is looking to ensure each client's needs are met, regardless of their entry point.

Goal 2: Improve Client Experience to improve convenience, accessibility, and satisfaction with access to services. Within policy and programmatic mandates, the County should consider the needs and desires of clients in when, where, and how they receive benefits, and the client's experience with services should be of a high degree of importance to the County.

Goal 3: Reduce Service Delivery Complexity to improve access to services whether by raising awareness of services, increasing referrals or improving the referral process across human services programs (where appropriate), or improving the convenience of services.

Goal 4: Realize Operational Efficiencies to improve efficiency in service delivery where possible, and without loss of quality of services. Outcomes, performance, and a positive customer experience will provide the ultimate measure of success.

Goal 5: Adopt Innovative Practices to model future-state service delivery on the most efficient and promising practices. Service delivery is constantly improving, and the County wants to ensure its services are easily accessible to clients and meets their needs as best as possible. Customer service, efficiency, and data will drive the development of service delivery models and the development of innovative practices.

Human service agencies function at their best when they deliver coordinated information and assistance, offer streamlined services, utilize innovative technology solutions, and provide effective physical environments. After the implementation of the recommendations included in this report, it is our belief that all these goals will become a reality for the County's human services agencies and clients.

Document Overview

This report presents a package of recommendations for achieving the goals of the County as well as an implementation plan. To realize a new service delivery mode, we see a need for true redesign of the delivery of human services, starting with a change effort that must be driven from within the organization to be successful. While efficiencies will be gained from each independent recommendation, the greatest impact will come from county and agency leadership adopting a new strategic direction promoting holistic customer service and horizontal integration to all staff and agencies to support the new NWD model. The American Public Human Services Association (APHSA) has developed several characteristics of a modern, 21st century, horizontally integrated health and human services delivery model (Figure 2). The County should strive to re-envision the delivery of human services within this framework; our recommendations are intended to help each agency move to a future state where streamlining processes, data, and other resources across agencies can have a positive impact on the client experience.

Horizontal Integration refers to the sharing of data, policies, processes, staff, resources, and technology across agencies to streamline processes, such as eligibility and enrollments.

Figure 2. APHSA characteristics of integrated health and human services model.

The successful implementation of these recommendations will depend heavily on the County's commitment to developing and communicating a new model for human services delivery. PCG's recommendations include steps to develop that vision, create pathways for accountability, and take advantage of the efficiencies that this new model will create. Although the implementation plan for the new model is a separate component of this project, it is not too early to begin laying the ground work for implementation.

An important component in any transformational project is sustainability. Developing and implementing a new system is of little value if it can be easily discarded by those who are opposed to change, or who have not "bought in" to the culture shift. There are a number of approaches to sustainable change; PCG has developed a method, referred to as "DESIgN," that sets objectives, expected outputs, and desired outcomes for each step in the change process, and helps to build and cultivate stakeholder buy in and organizational support. The County should utilize DESIgN, illustrated in Figure 3, or a similar method, to ensure that the work that goes into developing and implementing this new model of service delivery is not negated by a failure to manage change effectively.

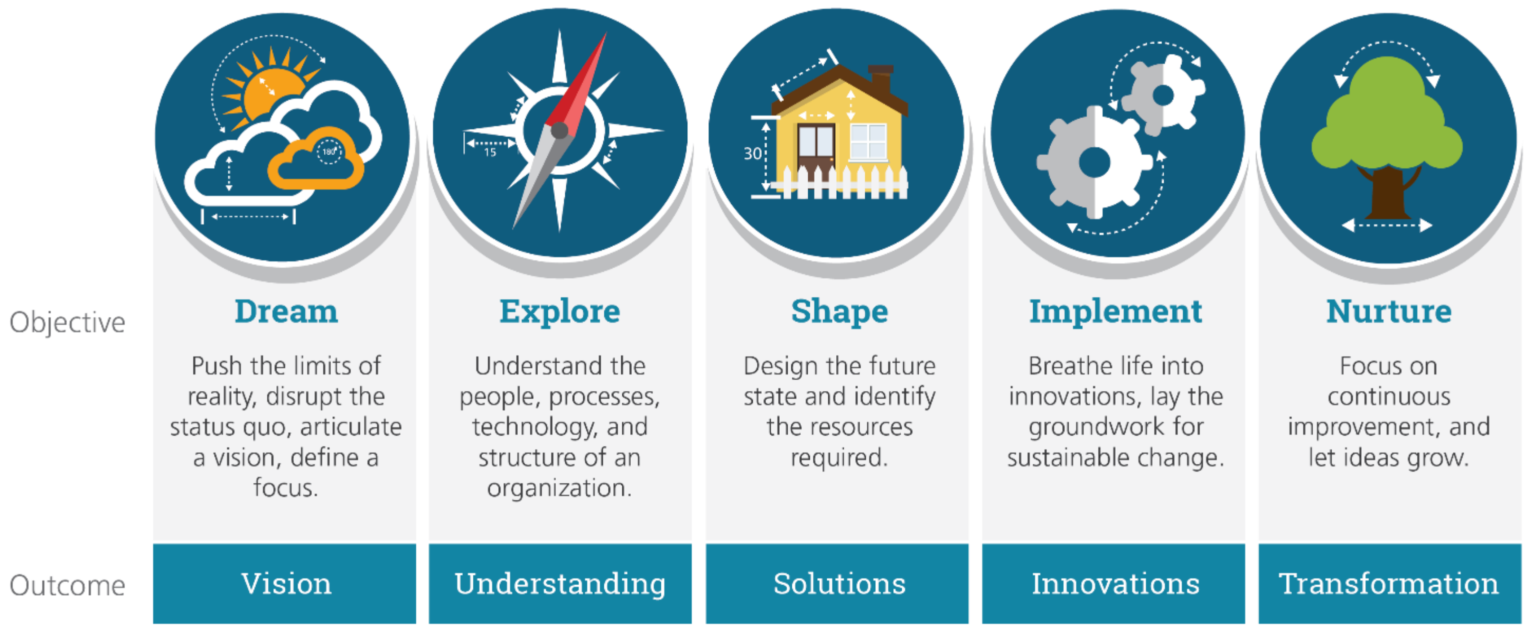


Figure 3. DESIgN framework for implementing and sustaining organizational change.

The recommendations included in this document and detailed in the subsequent sections will significantly improve the County's human services' customer experience, eliminate duplication of effort, and help to create a collaborative culture among agencies. Although the County should view each of the recommendations within the context of the larger report, it is not necessary to implement all of the recommendations at once. The County can still see significant impacts by moving forward with implementation of individual recommendations as funding and other conditions allow.

RECOMMENDATIONS KEY

Throughout the course of our evaluation we listened closely to agency leadership, supervisors, and staff about what recommendations would lead to improved client experience and streamlined service delivery. In addition to recommendations suggested by the County, we have included recommendations based on innovative and promising practices, quantitative and qualitative data collection and review, experience with other counties, and experience with other human service agencies. Each recommendation has been selected with the following criteria in mind:

- It is practical and realistic to implement
- It utilizes creative and innovative solutions
- It includes both immediate and long-term changes
- It will have a positive impact on client experience
- It creates value for both agencies and clients
- It will impact multiple agencies
- It addresses concerns raised by agency clients and staff
- It draws on best practices locally and nationally
- It must be cost-effective
- It must be in alignment with the mission, vision, values, and strategic plan goals of the County

The recommendations below include those that involve higher-level changes as well as those that are more closely related to the specific work of agency staff. Each recommendation includes a narrative that explains the reason why it is something that the County should undertake, how it meets key criteria listed above, and, most importantly, how it will impact the experience of clients seeking or accessing services.

Recommendations Summary Table

The table below contains a brief summary of each of PCG's recommendations, which will be discussed in more detail in the sections that follow. It should be noted that while cost estimates have not been provided for recommendations where County funds will be required for implementation, it is anticipated that several of these recommendations, including but not limited to Recommendations 1, 2, 8, and 11, will require capital funding to move forward. The implementation planning component of this project will reflect the time and effort required to secure capital funding as necessary.

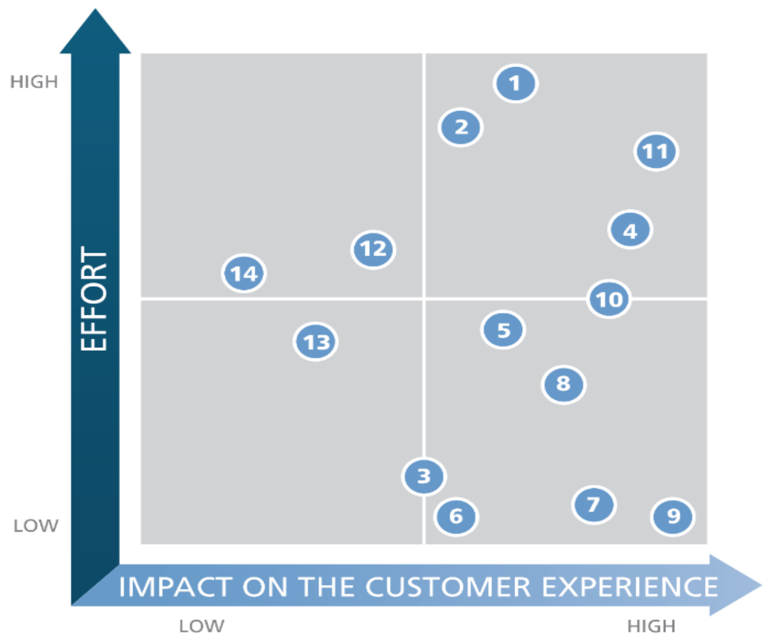
NO.	TITLE	SUMMARY
1	Improve Alignment at Human Services Facilities	Improve the physical facilities for human services agencies by renovating existing office locations and through development of a new central county location for administrative and home- and community-based staff.
2	Update Technology to Support Efficiency	Improve technology including mobile work supports, video interpretation and conferencing, and enhance the County intranet to decrease administrative burden and improve the quality of services.

NO.	TITLE	SUMMARY
3	Use Trainings to Build Professional Skills of Staff	Provide trainings for staff to further develop professional skills around human services programs, executive functioning, trauma, customer service, managing challenging client behaviors, poverty, and cultural competency.
4	Improve Interconnectedness at Entry Points	Improve the client experience by developing a Human Services Information and Referral Call Center and/or streamlining and consolidation of front desks.
5	Make Information Readily Available and Accessible to Clients	Improve client access to information about services through a client portal, self-service kiosks, and other automated customer service features.
6	Clearly Articulate a Human Services Vision	Establish a shared vision for human services agencies, establish a vision for each agency and its role in the shared vision, and acknowledge the need for culture changes and change management.
7	Adopt a Process to Consistently and Routinely Evaluate the Client Experience	Develop robust and frequent processes to obtain information about client satisfaction (phone calls, lobby surveys, text campaigns, online surveys, and other methods) to help agencies continuously monitor service quality.
8	Implement Workflow Efficiencies	Restructure agency workflows, adopt a culture of continuous improvement, and invest in workflow management systems to help agencies maximize efficiency and improve services.
9	Designate or Hire Full-time Temporary Project Manager to Guide Implementation Activities	Create a position to be responsible for coordinating implementation activities and managing projects and workgroups to support change management.
10	Establish Shared Measures Across Agencies and Accountability for Agency Outcomes	Develop shared measures and outcomes such as lowering child poverty, increasing access to behavioral health services, or decreasing food insecurity that can be achieved as a result of increased agency collaboration, and share measures in a public dashboard.
11	Implement System Architecture to Collect and Use Data for Strategic Decision-making	Harness the massive amount of data from each human services agency into a data warehouse and leverage it to inform strategic data-informed decisions.
12	Align Program Documents for Clients and Staff	Develop a single, county-wide “consent to release information” form and align other documentation across agencies to streamline services for clients and staff.

NO.	TITLE	SUMMARY
13	Create Liaison for Strategic Partnerships position	Create a new position to focus at a high level on identifying, developing, implementing, and monitoring opportunities for collaboration both between human services agencies and with community partners and other stakeholders.
14	Coordinate Back Office Support Across Human Services	Consolidate human resources, finance/procurement, information technology, fleet management, and/or communications functions across human services agencies to realize operational efficiencies.
15	Unify Health and Human Services Agencies Under a Single Umbrella	Create a single Human Services Department to oversee agency services and programs in order to achieve positive outcomes for clients, break down barriers between agencies, improve communication, realize cost savings, leverage resources, and share best practices.
16	Conduct a Workload Study for Selected Programs	Help agencies answer questions about staffing needs and the processing time required to deliver high quality services by conducting workload studies.

Recommendations Impact/Effort Matrix

PCG developed the following matrix that categorizes each recommendation according to both the effort it will take the County to implement and the impact that implementing the recommendation will have on the overall Human Services customer experience. Plotting the scores for effort and impact together allows the County to develop a broader plan for which recommendations should be implemented first, which can be implemented concurrently, and where the County can achieve both some "quick wins" and longer-term solutions.



1. Improve Alignment at Human Services Facilities
2. Update Technology to Support Efficiency
3. Use Trainings to Build Professional Skills of Staff
4. Improve Interconnectedness at Entry Points
5. Make Information Readily Available and Accessible to Clients
6. Clearly Articulate a Human Services Vision
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12. Align Program Documents for Clients and Staff
13. Create Liaison for Strategic Partnerships position
14. Coordinate Back Office Support Across Human Services

Implementation Plan Methodology and Components

After recommendations were developed according to these guidelines, PCG worked with the County to prioritize these recommendations according to both the perceived ability to move them forward, and to the anticipated impact on the customer experience. The result of this prioritization is reflected in the order of the implementation plans presented here, as well as the order of the recommendations in the final version of the Recommendations Report. While two of the recommendations were set aside for future consideration, the remaining 14 have been incorporated into the implementation plans in this document.

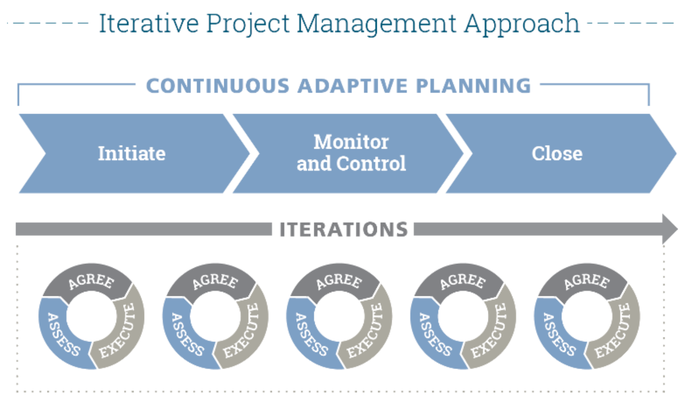
Our approach to creating this document was informed by a desire to ensure that implementation plans for each recommendation would be "evergreen," so that the County could implement one or more recommendations, independent of others. Therefore, we have created separate plans for each of the recommendations that include all of the steps necessary to implement them, along with timeframes, as opposed to specific dates. We have also created a "master timeline" that the County could use in a situation where it is possible to move forward with multiple recommendations at one time. Each implementation plan detailed on the succeeding pages is displayed in table format and includes the following components:

- **Task Name** – Each plan is phased out into several tasks, to be completed consecutively, each with its own set of action steps. The start and stop of these tasks signify the milestones for the plan.
- **Action Steps** – These are the specific steps and detailed activities that the County will need to take to complete each task.
- **Estimated Timeframe** – This section includes the estimated amount of time it will that the County to complete each action step. These timeframes may vary depending on when each plan is actually undertaken, and are meant to serve as a guide for planning.
- **Expected Outputs or Deliverables** – This section describes the expected results of each action step.
- **Dependencies** – This section compiles, across each plan, any activities that may need to take place in order for the plan to succeed. These activities may include things that fall outside of the actual plan but would impact the ability of the County to carry the plan out (i.e., funding or Board approval).
- **Implementation Resources** – This section details the resources that will be required to carry out each plan, often staff time or other activities that may bear an additional cost to the County.

The plans also include an introduction, a list of agencies that will be involved in the implementation of the recommendation, a list of anticipated outcomes, potential risks or challenges, with mitigation strategies where available, that the implementation may present.

Overall Approach to Implementation

The County should take an iterative approach to implementing these plans and use them as a roadmap for steps and a guide for areas of consideration and key decision points. Since the completion of tasks and subtasks in one phase may lead to organizational efficiencies that will benefit tasks in subsequent phases, measuring progress and outcomes along the implementation plan will increase the efficiency of the process towards the achieving the goals the County seeks. In an iterative approach, continuous adaptive planning is used, meaning that each new system or process that is rolled out should be tested and improved throughout implementation using data analysis and feedback from staff and clients. The expected outcomes defined in the implementation plan serve as a guide for the County and involved stakeholders. Expected outcomes are written to be tangible, measurable outcomes that indicate whether successful implementation has been achieved. Other characteristics of an iterative approach include:



- Ability to implement several tasks simultaneously.
- Ability to adjust implementation strategy or timelines due to unexpected outcomes, delays or obstacles.
- Regular meetings with stakeholders to check progress and discuss roadblocks.
- A continuous improvement process that is created from the solicitation of quick feedback from end-users/customers.
- A high-level of participation and transparency with staff and clients.

- Formation of cross functional teams where everyone participates in decision-making.
- Ability to change implementation priorities based on short-term business/political value.

In order for this type of approach to work and be successful in the overall endeavor (as well as future endeavors), however, the County must continue to invest in a culture of continuous quality improvement (as detailed in Recommendation 8 and further below). The key components that Human Services and agency leadership should focus on include:

1. **Using leadership strategically and productively**. Agency leadership should come together, not just to receive regular updates on changes across the County and communicate information, but as a working group dedicated to: challenging each other on performance metrics, sharing best practices, utilizing collective wisdom to solve problems or innovate, and working across agencies on shared outcomes. This change starts at the Human Services-level and should filter down into each agency and become a regular part of leadership meetings and the way the agencies do business.

2. **Using data to drive decision-making and engage in meaningful conversations**. The County should further their efforts to nudge the current accountability system to one that is based on a near-constant analysis of outcomes, uses an integrated approach across agencies, and accounts for the return-on-investment that Human Services produces. The ability to move to this type of organization is supported by the implementation steps detailed in Recommendation 11 that will produce the relevant data necessary for an analysis that identifies areas of risk, highlights trends, answers questions, explains outcomes, and drives an enhanced level of thinking.

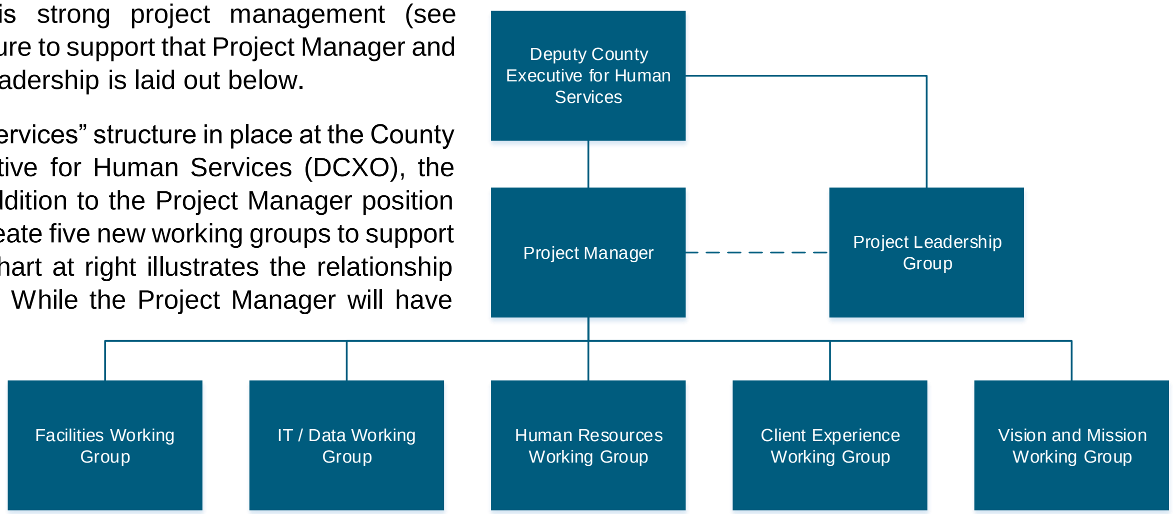
3. **Develop a formal process to drive change across agencies and at all levels of agencies**. Building on the evolution of the Process Action Teams, the County should ramp up its use of cross functional and cross-agency teams to drive change. These teams should engage in a formal process of engaging staff at all levels, meeting, chartering and goal setting, and continuous process improvement through a process such as Lean, Kaizen, use of decision-charting, or others. In addition, the following culture-focused components should be built into your formal processes.

   - Identify small steps, assess impact
   - Look at results that make an initiative sustainable
   - Get client input before finalizing plan(s)
   - Recognize competing demands
   - Get input from direct service staff
   - Focus on follow through
   - Engage stakeholders such as the Department of Information Technology (DoIT) and HR at earliest stages
   - Create a culture that allows mistakes

4. **Ensure communication around decision-making**. Leadership should work to further develop a “system” that values the input and engagement of direct service staff and supervisors in charting the course (or course correction) of the delivery of services. To accomplish this, the County should develop structured ways to communicate with and engage employees, through such venues as PAT participation, regular supervisory meetings, listening sessions with agency directors or the DCXO, messages on the Intranet, and others. These formal structures make it easy and straightforward for employees to participate, and to reach employees early in the decision-making process. The County should strive to communicate transparently and proactively to engage staff in shared decision-making.

Governance Structure

Also, key to the success of the County's effort is strong project management (see Recommendation 9) and oversight. A governance structure to support that Project Manager and ensure streamlined and effective communication with leadership is laid out below.



Because there is not currently an overarching "Human Services" structure in place at the County level, with the exception of the Deputy County Executive for Human Services (DCXO), the County should create a series of working groups, in addition to the Project Manager position suggested in Recommendation 9. The County should create five new working groups to support the implementation of the new business model. The chart at right illustrates the relationship between each of these groups and county leadership. While the Project Manager will have regular opportunities to present to and collaborate with the Project Leadership Group, the position will report to the DCXO.

It is anticipated that these groups will include staff from across each of the Human Services agencies, as well as other county staff as applicable (e.g., Public Works staff may participate in the Facilities working group; Human Resources staff should participate in the Human Resources working group, and potentially the Vision and Mission working group) who not only have background or expertise in the subject matter but have interest in the completion of the tasks involved. Staff may participate in multiple working groups, but agency leadership should take care to ensure that their day-to-day work is not impacted by this participation. The County should look to encourage participation in these working groups from staff at all levels to encourage buy-in and capture as many good ideas as possible; these groups may be able to build on the work of Process Action Teams (PATs) already meeting regularly in some agencies. These groups will handle much of the on-going work of implementation, under the guidance of the Project Manager; the Project Leadership Group will retain a level of oversight of these activities but will not be focused as much on day-to-day implementation work. Working groups must develop clear objectives and milestones to meet, and report out on the progress of work activities at regularly scheduled implementation meetings.

The following table represents the proposed working group structure to carry out these implementation plans:

Working Group Title	Implementation Plans Addressed
Facilities	Recommendation 1: Improve Alignment at Human Services Facilities
IT / Data	Recommendation 2: Update Technology to Support Efficiency Recommendation 11: Implement System Architecture to Collect and Use Data for Strategic Decision-making
Human Resources	Recommendation 3: Use Trainings to Build Professional Skills of Staff Recommendation 9: Designate or Hire Full-time Temporary Project Manager to Guide Implementation Activities

Working Group Title	Implementation Plans Addressed
	Recommendation 13: Create Liaison for Strategic Partnerships position Recommendation 14: Coordinate Back Office Support Across Human Services
Client Experience	Recommendation 4: Improve Interconnectedness at Entry Points Recommendation 5: Make Information Readily Available and Accessible to Clients Recommendation 7: Adopt a Process to Consistently and Routinely Evaluate the Client Experience Recommendation 8: Implement Workflow Efficiencies Recommendation 12: Align Program Documents for Clients and Staff
Vision and Mission	Recommendation 6: Clearly Articulate a Human Services Vision Recommendation 10: Establish Shared Measures Across Agencies and Accountability for Agency Outcomes

Funding and Resource Needs

Costs associated with implementing PCG's recommendations include expenditures for vendor contracts, the addition of staff, infrastructure and facilities upgrades, and system design and development as well as ongoing system maintenance and operations, including, but not limited to:

1. Two (2) new FTE positions (Liaison for Strategic Partnerships and Project Manager – the latter as a short term/temporary position)
2. Depending on the scope and nature of the technology improvements acquired, several FTEs could be needed in the future to provide ongoing maintenance, reports-developing/writing, and other supports.
3. Two (2) or more substantial technology systems, to potentially include a workflow management system, and a back-end data warehouse. In addition, there will be costs associated with providing enhanced technological tools for direct service staff.
4. Significant investment in facilities upgrades and additions (through the Capital Improvement Program).
5. Costs associated with changes to lobby designs/setup and additional signage, as well as with the addition of the integrated lobby and call center, including telephonic equipment, kiosk(s), and potentially FTEs depending on the level of staffing necessary.

COMBINED RECOMMENDATIONS AND IMPLEMENTATION PLANS

Recommendation 1: Improve Alignment at Human Services Facilities

Throughout the course of the discovery phase of this project, we heard from agency leaders, managers, and staff that the physical offices for human services agencies have some significant limitations that impact staff productivity, safety, and client access to services. We heard repeated requests for physical renovations and improvements, or additional or new office locations that could better serve the community. Facility issues arose on surveys as well; 59 percent of community partners surveyed suggested that "more convenient locations for services" were in their top five recommendations to impact their clients. Human services staff surveyed reported similar support for "more physical locations in parts of the community where client services do not currently exist" (38 percent), "co-location of human services agencies" (33 percent), and "improved office and meeting spaces" (29 percent).

Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Realize Operational Efficiencies

Primary Criteria Met

- ✓ Includes both immediate and long-term changes
- ✓ Addresses concerns raised by agency clients and staff

Below we propose a two-phase approach that the County should consider to address these facility concerns, as well as some additional smaller recommendations. The County may choose to implement Phase One and Two either sequentially or simultaneously depending on the capital investment available for renovations or new construction. The recommendations in Phase One can begin to be implemented immediately and roll out over a shorter period of time (in the next one to three years), whereas construction of a new facility under Phase Two is a longer-term recommendation.

PHASE ONE: RENOVATE EXISTING HUMAN SERVICES OFFICE LOCATIONS

We observed numerous challenges with the existing physical offices for human services agencies which can be improved upon with renovations and updates. Our recommendations focus primarily on the Ferlazzo and Sudley North offices because they are primary locations that serve clients and house multiple human services agencies. Additional locations where minor improvements can have a major impact are also included below.

Ferlazzo:

- Identify alternate locations for non-human services agencies, including Human Rights office and/or Tax Services, to allow CS and DSS to expand as necessary for additional staff offices and cubicles.
- Improve CS waiting room area with new lighting.
- Replace the intercom system at DSS to improve communication at the front desk so staff and clients can clearly hear each other at a reasonable volume.
- Develop a space at DSS that is dedicated to family visitation that is child-friendly and welcoming.
- Renovate the CS bathroom so a single person bathroom is available for observed urinalysis. This bathroom may also be more comfortable and welcoming for transgendered visitors.
- Improve signage and wayfinding in the atrium so visitors can quickly and easily locate agencies including:
    - Exterior “cling” type signage for the glass windows (see Figure 5);
    - Large overhead signs in atrium pointing visitors to CS (upstairs), OHCD, DSS, cafeteria, and bathrooms that are immediately visible at each entrance;
    - Clear signage that directs visitors to the elevator to access the second floor;
    - Arrows or indicators on the floor showing a path for visitors to follow to each agency; and
    - Additional signage in long hallways to indicate what programs or services are located at the end of the hall or behind locked doors. This helps orient new staff and promotes awareness of what programs are available within the building.

Figure 4. Example of clear interior signage.

Figure 5. Example of exterior window signage.

In addition, **the County should consider hiring staff to sit at a clearly labeled information desk during business hours to direct visitors to each agency and answer questions.**

Sudley North:

- Identify alternate location for VCE so that CS can expand as necessary for additional staff offices and cubicles. We recommend a location for VCE that is centrally located and has space available for community education groups.
- Renovate CS lobby area so a single bathroom stall is available for clients and visitors in the waiting area.
- Renovate CS bathrooms so a single person bathroom is available for observed urinalysis. This bathroom may also be more comfortable and welcoming for transgendered visitors.
- Add signage to direct staff and visitors towards agencies and programs within agencies to orient new staff and promote awareness of programs and services.

CSU Woodbridge:

- Install wireless internet service to improve staff’s ability to work efficiently from their desk, meeting rooms or common areas. Wireless internet will also allow clients and other waiting in the lobby or attending meetings or appointments to access information that may help them and communicate with others.

Figure 6. Example of street sign.

PWHD WIC Woodbridge Office

- Adjust lobby seating so that parents can more easily maneuver strollers and queue up for the front desk. This may be accomplished by renovating in the future to combine with Clinical Services and WIC.

All Human Services Locations

- Implement street signs within two block radius of office location directing public to human services agencies (similar to signage near Manassas Senior Center now). This will increase visibility of services and help visitors locate the building.
- Develop standard signage for all human services agencies including font, color, and logo that promotes uniformity and instant recognition for the public.
- Ensure that all locations have clearly marked signs at the entrance of the parking area and on the building itself near the main entrance.
- Install clear signage inside buildings and near lobbies directing visitors to areas where they can get more information or have their questions answered.

Figure 8. Clear building signage.

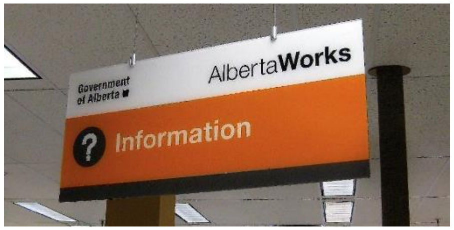


Figure 7. Example of lobby sign.

Figure 9. Example of uniform signage with logo.

PHASE TWO: IDENTIFY OR BUILD A CENTRAL COUNTY LOCATION IN ADDITION TO PRIMARY SERVICE HUBS AT EAST AND WEST ENDS OF COUNTY

The County can benefit from a new location to house combined human services agencies. During the Discovery Phase we learned that there are 19 physical locations for human services agencies across 248 square miles in Prince William County. Clients have to travel between locations to access services from different programs. The physical locations of services also present a challenge for agency staff who travel between locations for meetings, appointments with clients, collecting materials and tools, and delivering home- and community-based services to clients. The different locations also present a challenge to supervisors, managers, and agency leaders who are located across the County, hindering communication and collaboration. An additional, third primary location for human services agencies would not replace the primary service hubs for clients located in the East (Ferlazzo) and West (Sudley North) parts of the county, which should still be improved with the renovations recommended in Phase One. Clients would still need these locations to access services closest to where they live. However, it would likely remove the necessity for overflow spaces like the Ridgewood location and serve as a point where more staff and leadership can be housed together to also improve internal coordination. A central County location would house the following:

The trend of consolidating human services programs in a single location is growing in popularity across the country, and particularly in county-administered states, where local counties have more autonomy to organize services. For example, in 2014 **Arlington County**[1] consolidated human services, including Public Health and Community Services, in a single location close to where many clients live and accessible by public transportation. **Both Onslow[2] and Wake[3] Counties (NC)** have consolidated programs in a centralized building, or are considering such a move, as well as **Gwinnet County, Georgia**.[4]

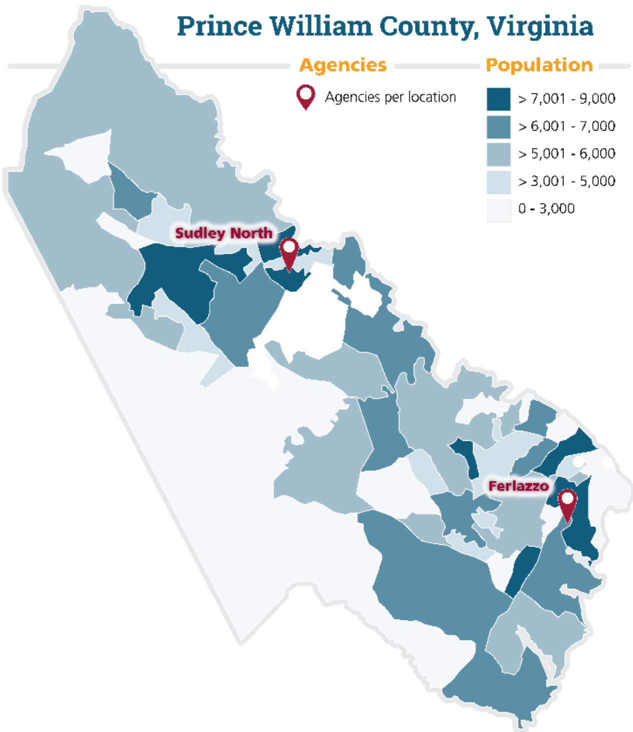


Figure 10. A large percentage of the County's population is far from the two main hubs for human services.

1. Centralized human service agency administrative staff (as discussed in Recommendation 14), including agency directors, and human resources, information technology, and finance. We recommend that agencies evaluate whether a single point person for these services should remain in the client service hubs so staff can have immediate access to support from these units.

2. Home- and community-based program staff to facilitate their ability to reach clients throughout the county as needed. This may include the CS programs like Program for Assistance in Transitioning the Homeless (PATH), the Get on Track program (GOT), and Early Intervention for example and DSS services like Child Protective Services (CPS) and Adult Protective Services (APS), and OHCD staff who conduct inspections across the county.

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[1] *Arlington County Board approves lease to consolidate human services at Sequoia Plaza.* (July 24, 2014). https://newsroom.arlingtonva.us/release/arlington-county-board-approves-lease-to-consolidate-human-services-at-sequoia-plaza/
[2] *Onslow County to dedicate new human services building.* (May 30, 2017). http://www.jdnews.com/news/20170530/onslow-county-to-dedicate-new-human-services-building
[3] *Wake County considers new $61 million public health campus.* (January 15, 2018). http://www.newsobserver.com/news/local/counties/wake-county/article194772074.html
[4] *Georgia consolidating Gwinnett DFCS, child support offices in new facility.* (June 1, 2016). http://www.gwinnettdailypost.com/local/cities/lawrenceville/georgia-consolidating-gwinnett-dfcs-child-support-offices-in-new-facility/article_d14871d0-8770-5f49-a5a7-b1693ead5462.html

3. Dedicated meeting space for agency staff meetings and collaboration with community partners.
4. Dedicated smaller meeting areas for interviews or family team meetings including Family Assessment and Planning Team (FAPT) meetings.
5. Dedicated family visitation and interview space that is child-friendly and welcoming.

Additional Considerations

To maximize the efficiency of current office space and reduce the need for staff to contribute to traffic congestion, agency leadership should identify roles that can be carried out from home and what technology supports are necessary to support their work, such as laptops, mobile Wi-Fi devices, or printers. If this results in reduced need for cubicles or desk space in offices, designate shared workstations for when staff do need to come into an office. The County can incentivize staff to become home-based by offering stipends for internet service or supply them with mobile hot spots.

Also, as additional human services locations are identified or built, agency leaders should work proactively with local and regional transportation systems to ensure that locations are adequately served by public transit. This includes a consideration of how far clients have to walk to access a bus route, average wait times between buses and frequency, vehicle capacity, and transfer points. As leases on other County properties are approaching expiration, the County should evaluate each location to determine if the location meets County and client needs against the following areas and questions:

Accessibility	*Is the location fully ADA compliant?*
Capacity for meetings and group education	*Is there adequate space for meetings and group activities?*
Capacity for staff workspace	*Do staff have adequate work space?*
Distance for home- and community-based services	*How far are staff having to travel to deliver services from this location?*
Parking	*Is parking adequate, accessible, and safe for clients and staff?*
Proximity to client homes by zip code	*How accessible is this location to where clients live?*
Public transportation	*What is the proximity to public transit?*
Safety	*Is the location safe for all clients and staff?*
Signage	*Are the building and services easy to identify?*
Technology limitations	*Does the location have Wi-Fi or other technology amenities?*
Volume of client daily traffic by program or service	*How many clients are served in this location?*
Waiting areas	*Are the lobbies well laid out and sufficient?*

Implementation Plan

The implementation plan for Recommendation 1 includes the steps necessary to Improve Alignment at Human Services Facilities, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Please note that due to the complexity and long-term nature of Recommendation 1, it includes "sub-recommendations" to help group tasks across the renovation and new construction components of the project.

Agencies Involved

It is anticipated that all Human Services agencies will be involved in the implementation of this recommendation. The County Executive's Office, the Capital Improvement Program, the Public Works Department and Facilities Management Group will also have roles in various stages of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- A study that recommends locations for a new central county Human Services building and options for construction.
- Upgrades to current office locations that help the County meet the needs of clients and staff during the time that a new facility is being considered and constructed.
- Better access to Human Services programs for clients and staff across the County.
- Opportunities for enhanced collaboration by central office staff across agencies, if they are collocated in a new facility.

Recommendation 1: Improve Alignment at Human Services Facilities			
Sub-Recommendation	**Renovate Existing Human Services Office Locations**		
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
1.1 ESTABLISH HS FACILITIES WORKING GROUP	1.1.1. Identify members to form working group with representation from each Human Services (HS) agency including Project Manager and representatives from Facilities Construction Management (FCM), along with representatives from the Communications Department and Department of Information Technology (DoIT).	Month 1	✓ Representation from all HS agencies, Communications, and DoIT, and established leadership and roles
	1.1.2. Convene working group and establish meeting schedule and frequency.	Month 1	✓ Working group is productive
	1.1.3. Review implementation plan and identify which action steps should be completed by workgroup during meetings, what can be assigned as “homework,” and what can be delegated to a leader(s) or agency staff.	Months 1-2	✓ Responsibilities delegated as appropriate to maximize efficiency
	1.1.4. Identify which improvements detailed in Recommendations Report should be implemented based on established criteria and potential sources of Funding. (See Appendix A for example criteria and Appendix B for potential funding sources)	Months 3-4	✓ Recommended renovations evaluated to weigh impact and opportunity

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
1.2 APPLY FOR BUILDING AND FACILITY CAPITAL PROGRAM FUNDS[5]	1.2.1. Submit list of selected eligible renovations to PWC Public Works Department for general funding and for Building and Facility Capital Program Funds.	Months 4-5	✓ Eligible expenses may be accepted for Building and Facility Capital Program or general Public Works funding ✓ HS agencies may be able to request funding through annual budget process
	1.2.2. Meet with Public Works to discuss which renovations can be made.		
	1.2.3. Receive approval from Public Works to make renovations to existing county buildings.		
1.3 IDENTIFY OTHER SOURCES OF FUNDING FROM PROGRAM OR AGENCY BUDGETS OR PUBLIC WORKS DEPARTMENT	1.3.1. Identify other renovations not eligible for capital improvement funding.	Months 4-5	✓ Renovations may be funded with other sources of agency or county funding
	1.3.2. Submit requests for funding to agencies or Public Works Department.		
	1.3.3. Receive approval from agencies and follow process to implement renovations or signage.		
	1.3.4. Communications should draft and submit a press release to the appropriate media outlets to inform the public of the renovations.		

[5] The County has approximately $8M of funding available to make improvements on existing county facilities. These are typically maintenance improvements associated with older buildings (ex. new HVAC system, roofing, sidewalks, etc.) and are based on a schedule for anticipated maintenance based on the age and condition of the facility. Public Works did not indicate any formal process to submit items for consideration. These funds are allocated over the course of the fiscal year and availability is not guaranteed.

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
1.4 UTILIZE KIOSKS TO PROVIDE INFORMATION	1.4.1. Define goals, expectations, and outcomes of information kiosks. Information kiosks can be used for a number of purposes and at varying levels of complexity. While the project team should brainstorm possible uses and goals, some ideas include: • Kiosks in county buildings to help visitors locate services. • Kiosks in high traffic public areas to inform the public of services and share public notices. • Kiosks in high traffic public areas that also display wait times at different locations, including availability at area shelters. • Kiosks that could be used for multiple functions by multiple County agencies (beyond Human Services) • Consider surveying the public and other stakeholder groups for feedback on potential ideas.	Months 1-3	✓ Clearly defined goals, expectations, and outcomes
	1.4.2. Develop RFP for information kiosks and content and technical development services, if necessary.	Months 4-5	✓ RFP ✓ Procurement of information kiosks and content and technical development services, if necessary
	1.4.3. Complete procurement process to select a vendor for information kiosks and content and technical development services, if necessary.	Months 6-8	✓ Information kiosk vendor selected to meet requirements and outlined goals and expectations
	1.4.4. Develop a marketing campaign to educate the public of the added value of the kiosks and to strengthen the County's presence and partnership in the community.	Months 8-10	✓ Public understanding of the kiosks and their purpose/uses ✓ Strengthened public awareness of the County as a partner
	1.4.5. Develop standard operating procedures (SOPs) for building lobby areas that build in the ability of kiosks to provide self-service opportunities to clients and reduce burden on staff.	Months 8-10	✓ Clear understanding of how kiosks will be used in lobby context
	1.4.6. Install and implement information kiosks, ensuring sufficient staff presence to handle technical issues, the public's questions, and increased server traffic if linked to the County's website.	Months 9-12	✓ Supported implementation process to seamlessly handle any challenges that arise

Recommendation 1: Improve Alignment at Human Services Facilities			
Sub-Recommendation	**Identify or Build a Central County Location in Addition to Primary Service Hubs at East and West Ends of County**		
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
1.5 CONDUCT REVIEW OF PAST CAPITAL PROJECTS AND DEVELOP PLAN	1.5.1. Review any lessons learned from design and proposal to build new animal shelter.	Month 1	✓ Avoid potential pitfalls and maximize potential success
	1.5.2. Review any lessons learned from construction of Development Services Building.	Month 1	
1.6 DEVELOP PROPOSAL TO REQUEST FUNDING	1.6.1. Meet with County Architect and others from the Facilities Construction Management (FCM) group to identify potential locations and begin cost projections.	Month 1	✓ Gain an understanding of the process and costs to plan and build a new facility
	1.6.2. Develop proposal summarizing challenges, needs, and benefits for a HS agency building in central county location. Include estimated costs and potential locations. (See Appendix C for ideas)	Months 1-4	✓ A PowerPoint presentation that concisely summarizes the recommendation for a central county location for HS agencies
	1.6.3. Meet with the County Executive and Board of County Supervisors to discuss recommendation for a central county location for HS agencies and garner support and provide direction.	Months 1-4	✓ Obtain support to move forward with budget request
1.7 SUBMIT AND OBTAIN REQUEST FOR FUNDING	1.7.1. Submit request for Capital Improvement Program (CIP) funding in budget module to support process to evaluate potential locations and design options for renovations or new construction.	Month 5[6]	✓ Funding to support study of potential locations and options for new construction
	1.7.2. Obtain funding for planning year to evaluate locations and develop design options with architectural firm.	Months 6-12[7]	

[6] CIP requests for the following fiscal year are submitted in September. For inclusion in the FY20 CIP, requests will be submitted between September and November 2018.
[7] Depending on when CIP request is made, funding may be available to move forward prior to month 12, in which case timelines for Task 1.8 can be moved up.

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
1.8 STUDY PLANNING AND OPTIONS FOR CENTRAL COUNTY HS BUILDING	1.8.1. Develop and release RFP to obtain architectural firm to identify potential location(s) and design central county HS agency building.	Months 10-12	✓ A study that recommends locations a new central county HS building and options for construction
	1.8.2. Award contract to architectural firm.	Month 12	
	1.8.3. Conduct study to determine potential locations and develop options for construction of a central county HS building.	Months 13-23	
	1.8.4. Prepare presentation and present options to Board for selection.	Month 24	

Dependencies	Implementation Resources
Requires a well-defined and functioning workgroup with strong leadership	Staff time
Requires County Executive support	Meeting space
	Funding to support capital improvements
	Funding to hire architectural firm to develop options for new construction

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **The County may have competing priorities for funding other capital projects.** Facility construction and renovation are expensive tasks, and the County has a limited amount of funding available each year to address capital projects. **Mitigation Strategy**: The County will need to determine how to make funding available over the course of several years to pursue implementation of this recommendation.

- **The timeframes for desired renovations and investments may not align with the budget cycle.** Agency budgets and the CIP process are tied to the County fiscal year (July 1 – June 30), and funding must be allocated to these projects well in advance of them moving forward. This plan references the dates for the CIP cycle, but makes no other assumptions about when the County would choose to move forward with this plan. In short, the ability of the County to complete and receive approval for funding requests in a given budget cycle will determine how long it takes to move forward with implementation.

- **The facility needs for human services agencies are expected to continue to grow, increasing need for behavioral health services, and other factors. Mitigation Strategy:** The County should ensure that, to the extent possible, future projections of need are incorporated into the facilities planning efforts carried out in this implementation plan so that an appropriate level of capacity is included in any new facility updates or designs.

Recommendation 2: Update Technology to Support Efficiency

Primary Goals Achieved

- ✓ Realize Operational Efficiencies
- ✓ Improve Client Experience

Primary Criteria Met

- ✓ Positive impact on client experience
- ✓ Addresses concerns raised by agency clients and staff

Throughout the discovery phase of this project, staff expressed their frustration with having to lug heavy laptops into the field and not having seamless, up-to-date technology supporting them in fulfilling their responsibilities. This was particularly the case for staff who do home visits and struggle with their air cards for reliable Wi-Fi, having too many devices and cords that children could grab, and then have to manage the slow process of re-entering their field notes when they return to their desks.

The lack of the most updated technology — both hardware and software — slows the workflow of staff and ultimately impacts the services that clients receive because information is not streamlined. Improving the ease with which staff can perform home visits and reducing the administrative burden requiring them to be at their desks, frees up time that they can spend with their clients. This results in more time for home visits and higher quality service delivery where staff can be focused on their client. The same is true for staff who are office based; accurate information and streamlined processes allow staff to focus on their clients instead of being distracted by the tools meant to support them.

ENHANCE MOBILE TECHNOLOGY FOR MOBILE STAFF

Enhanced mobile technology may include functionality like an application with critical case management functionality that shares information with a case management system, allowing for access to historical information in the field and for the ability for field notes to automatically interface with the main system; the ability to take and store photos, videos, or other media; or the ability to document case notes via talk to text functionality. This can result in significant time savings and efficiencies for staff, particularly for staff that meet their clients outside of a traditional office setting or are in regular, close contact with their clients, including:

- CS – Early Intervention specialists, GOT, PATH, New Horizons
- AAA – In-home support assessments, other services
- PWHD – long-term care assessments, TB monitoring
- DSS – juvenile services, Adult Protective Services, Child Welfare, and Homeless Prevention team
- CSU – Gang Response Intervention Team (GRIT), probation officers
- OHCD – HCV Inspections staff

Miami-Dade County (FL) found that mobile case management technology produced a 30% rise in home visits as administrative time was reduced and ease and timeliness of reporting and compliance requirements was improved. The total increase in productivity is estimated to be 45%, simultaneously increasing the time available for case work and job satisfaction thereby reducing staff turnover, for a total savings of tens of thousands of dollars each year.

Applications that are designed for smartphones and tablets allow for easier scheduling and communication with managers and team members as well as the safety feature of a panic button and GPS location. They will also make it easier to protect client information, reducing the risk of carrying around paper files. Tablets reduce the burden of carrying around multiple pieces of technology that are cumbersome and time consuming to set up. There is also potential to streamline data entry and upload notes and information directly from the mobile solution.

ENABLE REMOTE VIDEO INTERPRETATION AND CONFERENCING SERVICES

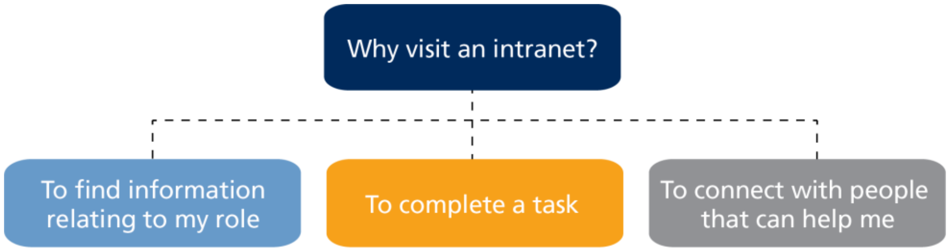
Each agency is challenged to communicate with and serve the needs of the growing population of clients who speak a language other than English. While LanguageLine is available, staff expressed frustration with the quality and reliability of translation and reported that it can take three times longer to communicate via LanguageLine as compared to a standard interaction. In particular, LanguageLine does not allow the translator to see the speaker's facial and body language cues, which can be essential in a number of settings. Some agencies have a Spanish translator on staff but translators for other languages, such as Farsi and other languages spoken by more recent arrivals to the County, are currently scarce. Often, staff who happen to speak the language needed are pulled away from their own work to assist with translation.

The ability to video conference with a translator would result in higher quality interactions between clients and staff, improved quality of information gathered, as well as increased efficiency. This can be accomplished by expanding to LanguageLine's InSight Video Interpreting® service or exploring other remote video interpretation providers. This service is also available as an app to support field-based staff with smartphones.

In addition, CS commitment hearings currently take place in a conference room at CS's Sudley North office. The room gets crowded with attendees and patients. It is a challenge to bring everyone to the same location and a disturbance to regular clients. Video conferencing technology, including a TV screen, speakers, and camera, allows time savings by bringing everyone together without requiring anyone to travel, and reduces the risks associated with meeting patients who may become agitated or uncomfortable in a crowded room.

EXPAND AND EMPHASIZE USE OF THE COUNTY'S INTRANET SYSTEM

Use of the County's intranet page should be further encouraged as it provides an opportunity for information sharing and to disseminate important notifications that support a culture of a larger, collaborative human services organization. During interviews, staff acknowledged that they do not frequently use the County intranet site. Encouraging use is accomplished by making the intranet site a valued and accessible resource that meets the needs of staff, rather than one more item on their checklist.



Award winning intranet sites:

- Engage their staff by being essential to day-to-day work;
- Allow personalization;
- Create social networks;
- Store shared resources and enterprise-wide approved documents; and
- Are simple and intuitive to use.

The screenshot in the example below (Figure 11) highlights how some of these characteristics can be incorporated into an intranet site that adds value to staff and the agency.

Figure 11. Elements of a successful intranet site.

The circles above highlight features of this intranet site that make it useful and engaging to agency staff:

1. The intranet's name represents organization's culture.
2. A search bar helps staff locate internal documents or other information.
3. The drop-down menus allow staff to easily locate resources.
4. The content is staff-focused to encourage engagement.
5. The site includes intuitive and convenient links for daily functions.
6. A Google search bar in included so that intranet can function as homepage.
7. Agency news and announcements are highlighted for easy access.

A common information resource will help staff stay current on practices across agencies. One way to improve the frequency of intranet use is to set it as an internet homepage or to automatically open when the computer turns on. Notifying all human services agencies of policy or procedural changes within agencies, highlighting community partners, and providing information on federal requirements are all ways agencies can stay current on changes that affect their clients.

Implementation Plan

The implementation plan for Recommendation 2 includes the steps necessary to Update Technology to Support Efficiency, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all Human Services agencies will be involved in implementing this recommendation. In addition, county Budget and Finance, DoIT and Communications staff will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Increase in efficiency for staff.
  - Increase in time for direct-service activities and decrease in time required for paperwork.
  - Decrease in travel costs and increase time for clients, staff and stakeholders.
- Improvement in “cohesion” among staff.

Recommendation 2: Update Technology to Support Efficiency			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outcomes or Deliverables**
2.1 ENHANCE MOBILE TECHNOLOGY FOR STAFF	2.1.1. Create a list that details technologies needed. 2.1.1.a. Project Manager schedules meeting with the IT Working Group to kick off the technology update initiative across agencies. Include Budget and Finance in the workgroup and kickoff. 2.1.1.b. Create meeting schedule for the initiative.	Month 1	✓ Workgroup to initiate technology update efforts ✓ Meeting schedule and goals
	2.1.2. Working group develops technology needs and specifications, including: 2.1.2.a. Review existing list of IT systems and determine whether it is up to date, and which systems are obsolete, need updating, or have been tagged for updating in the near future. 2.1.2.b. Determining the best options for upgrade within the existing replacement schedule. 2.1.2.c. Creating, as needed, a written plan for updating existing staff technology and an amendment to Capital Improvement Plan. 2.1.2.d. Working with DoIT to decide what specific brands and types of technology would work best based on needs of the mobile staff.	Months 2-3	✓ Draft of written plan to update technology for staff
	2.1.3. Submit plan to County leadership and IT Committees for review, revision and approval. 2.1.3.a. Submit request to County Leadership to initiate the planning and procurement process for mobile technology update for staff across HS and other County agencies and departments. 2.1.3.b. Make TIP request to funds to include update in FY21 budget (if not available in current budget). 2.1.3.c. Once approved publish plan in the appropriate place.	Months 4-6	✓ Plan to County leadership for review, revision and approval ✓ Plan provided to technology review board ✓ Plan provided to IT Advisory Board

Task	Action Steps	Est. Timeframe	Expected Outcomes or Deliverables
	2.1.4. Procure updated technology and devices. 2.1.4.a. Begin the process of ordering/requesting new devices and technologies for staff.	Month 7	✓ Partnership with the procurement department to obtain news devices and technologies for staff to increase productivity
	2.1.5. Create or distribute materials for staff regarding how to use the new technology.	Month 7	✓ New training materials and resources
2.2 ENHANCE REMOTE VIDEO INTERPRETATION AND CONFERENCES	2.2.1. Engage IT working group to begin efforts to enhance remote video interpretation. This can be done in tandem with 2.1.	Month 1	✓ Workgroup to initiate technology update efforts ✓ Meeting schedule and goals
	2.2.2. Identify where the greatest need for these capabilities are needed across all agencies (using PCG Recommendations as guidance).	Month 1	✓ Needs study across HS agencies
	2.2.3. Create plan to enhance video interpretation and conferences in agencies with the greatest need. 2.2.3.a. Identify possible partners to provide video interpretation system services 2.2.3.b. In partnership with Finance and DoIT, create a budget to estimate cost to the County to undertake this enhancement. 2.2.3.c. Prioritize agencies/staff who need this capability the most and where it will have the most impact. Determine how to include video as an enterprise-wide priority for DoIT.	Months 2-3	✓ Draft enhancement plan
	2.2.4. Present plan to County leadership and IT Committees for review, revision, and approval.	Months 4-5	✓ Plan to County leadership for review, revision and approval ✓ Plan provided to technology review board ✓ Plan provided to IT Advisory Board
	2.2.5. Identify source of funds in current and/or future budget. If necessary, add to TIP for FY20.	Months 4-5	✓ Funding “plan” or addition to FY20 TIP

Task	Action Steps	Est. Timeframe	Expected Outcomes or Deliverables
	2.2.7. Identify partner to provide translation services.	Month 7	✓ Partner identified
	2.2.6. Work with County leadership, DoIT, and the procurement department to draft, review, and publish bid for services.	Month 6	✓ RFP
	2.2.8. Begin implementation efforts to install new technologies in identified agencies.	Months 7-9	✓ RFP disseminated ✓ Remote video interpretation and conferences services technology procured
	2.2.9. Provide training and manuals to staff on how to use these new technologies.	Month 9	✓ Training on new video translation and conference services
2.3 EXPAND AND EMPHASIZE USE OF COUNTY'S INTRANET SYSTEM	2.3.1. Working together, the Communications Director and the Online Communications Manager and the PM gather input from agency, ensure alignment of the County's intranet needs with the changes happening at the county-level, and update county leadership about the intranet system update.	Month 1	✓ Input from county and agency leadership about the intranet update
	2.3.2. Engage DoIT and state agencies who are a part of HS to explore a way for state staff to access part/all of Intranet (as applicable).	Months 1-6	✓ Considerations made for state staff who are part of HS to access County Intranet
	2.3.3. Research intranet sites listed as best practices provided in PCG's Recommendations Report and identify opportunities to make the website more functional for end users. Best practices include: 2.3.3.a. Designing a site that is engaging to staff and *essential* to their day-to day tasks, while also simple and intuitive to use 2.3.3.b. A site that allows personalization but also promotes standardization. 2.3.3.c A site that creates/encourage social networks. 2.3.3.d. A site that hosts and stores shared resources and approved documents.	Months 2-3	✓ Best practices that are incorporated into the website redesign

Task	Action Steps	Est. Timeframe	Expected Outcomes or Deliverables
	2.3.4. Office of Communications staff, along with input from Project Manager, work together to identify new design and layout and incorporate best practices.	Months 3-8	✓ New and improved website layout and design
	2.3.5. Submit website redesign draft to County Leadership to review, revise, and approve.	Month 8	✓ County Leadership approval of draft website redesign
	2.3.6. Implement changes described in the approved plan.	Months 8-12	✓ Updated intranet site
	2.3.7. Publish the new website on the county's domain.	Month 12	

Dependencies	Implementation Resources
Organizational IT infrastructure to update and enhance technology	Funding for additional laptops, tablets, smartphones and aircards/hotspots as well as video conferencing materials
Development of an intranet that is useful for HS staff and brings people together	Time to implement (many of these tasks may take upwards of 12 months to implement)

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Needed resources are unable to be procured.** Once the County begins undertaking the changes described herein, technology purchases will be required. If these expenditures are not approved, there are few avenues available for the County to achieve the same results and have a positive impact on efficiency and customer service. **Mitigation Strategies**: For budget requests, leadership should provide detailed descriptions of why each request is needed, providing business needs, tied to outcomes, for each line item.

- **County Leadership and Project Sponsors aren't able to engage or provide leadership to the ongoing effort**. In order for this transformation to succeed, there must be active involvement and buy-in from members of the County's Leadership group; otherwise, without direction from the top, major decisions will not be able to be made and little will be able to change. **Mitigation Strategies**: The Project Manager must ensure that members of leadership are involved at a level that isn't heavy-handed, but gives them decision-making powers.

Recommendation 3: Use Trainings to Build Professional Skills of Staff

Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Adopt Innovative Practices

Primary Criteria Met

- ✓ Positive impact on client experience
- ✓ Aligns with vision, mission and goals of County

While training was not a specific focus of the discovery phase of this project, it did arise during our evaluation as a topic where additional county investment is desired. Throughout our interviews and focus groups with staff across human services agencies we observed a strong desire from professionals at all levels to continue to develop their professional skills and ability to serve clients through training and continuing education. Our experience with other agencies, as well as research, supports the idea that increased interagency coordination can improve both access to services and better outcomes for clients. For example, a national longitudinal study of child welfare agencies and mental health service providers found that high levels of interorganizational relationships improve service access and mental health outcomes.[8] The authors further recommend that cross-training of staff, along with sharing case level data, blended funding, written agreements, and joint programs, can support more inter-agency collaboration.

Training and professional development benefits staff and teams by increasing skills of mastery, satisfying requirements for continuing education, and promoting team cohesion. Clients benefit from staff who have participated in advanced training topics because they can better understand the needs of clients and how to help them.

While in-person training is ideal for most topics, it doesn't always complement the different adult learning styles and can take staff away from their day-to-day responsibilities. Trainings are best delivered through a mixture of in-person, classroom style instruction, and online, self-directed modules. We recommend that the County invest in training on the special topics below and offer them in a variety of formats. These trainings should also be developed to satisfy continuing education requirements for licensure. These topics were selected because they were either specifically mentioned as an area of interest from staff or they are recommended topics based on experience with training in other communities.

[8] Bai, Y., Wells, R., & Hillemeier, M. M. (2009). Coordination between child welfare agencies and mental health service providers, children's service use, and outcomes. *Child abuse & neglect*, *33*(6), 372-381.

Special training topics may include:

Cross-training on human services programs

Staff surveyed and interviewed generally reported knowledge of their own agency's services and programs, but noted challenges with knowing what services were available in other agencies. As the County moves forward with a new model of service delivery in which each staff member is at a minimum knowledgeable of the programs and services offered across human services agencies, training staff on the services and programs offered by other agencies will help them make better referrals for clients and build a common understanding of agency mandates, restrictions, and opportunities to help the community. This training should be offered to all human services agency staff at an introductory level and offered at a second, more in-depth level to staff responsible for information and referral services at the front desk or primary agency phone number.

This type of cross-training has been successfully implemented in other communities and provides an opportunity for staff to enhance their understanding of services as well as network with peers from other agencies. For example, DuPage, Kane and Will Counties in Illinois brought together child welfare, early care and education, and housing and homeless service providers for cross-training to learn about each other's systems.

Executive functioning and self-regulation

Clients who receive services from human services agencies may have impaired executive functioning that impacts their ability to request, apply for, and receive services and programs. Executive functioning is the brain's way of managing and processing complex information. Both executive functioning and self-regulation can be impacted by biological differences present at birth, or impaired by damage to the brain as children or adults including physical trauma, neglect, maltreatment, substance use, and illness. Challenges in this area can lead clients to engage in non-compliant behavior, return incomplete paperwork, mismanage their schedule and appointments, and engage in disruptive behavior. Human services agencies can enhance services to clients with impaired executive functioning by understanding the drivers of these behaviors and learning skills to help clients and improve processes.

The County of San Diego has successfully developed a program model based on brain research around executive function that combines health and wellness, exercise, peer support and job search activities to propel TANF individuals to employment and self-sufficiency. The program has achieved employment outcomes at 3-4 times the rate of typical TANF services and has also led to improved health outcomes including weight loss and reduced body mass index and blood pressure for participants.

The impact of trauma and adverse childhood experiences (ACEs)

Research has shown that adults who experience multiple adverse childhood experiences (ACEs) including everything from divorce and parental incarceration, to child abuse and neglect, are more likely to develop chronic physical and behavioral health issues that impact their wellness, productivity, and capacity to function. Understanding the impact of childhood trauma and ACEs can help human services staff relate to clients and to each other resulting in an improved customer service experience. Training on ACEs has become standard practice in child welfare and juvenile justice agencies, but can be beneficial for all human services agencies because of how widespread the impact of trauma and ACEs are on child and adult outcomes.

There are currently nine Trauma-Informed Community Networks (TICNs) across the Commonwealth of Virginia who are actively engaged in collaboration and training to create a trauma-informed culture amongst human services agencies and partners. For example, Fairfax County offers multiple introductory and advanced trainings on the impact of trauma: https://www.fairfaxcounty.gov/neighborhood-community-services/prevention/trauma-informed-community-network

Poverty and services simulation

During this project, human services agency leadership engaged in a client experience simulation that exposed how disconnected and challenging it can be for clients to access services across the County. Several leaders commented, and we agree, that a similar experience could benefit supervisors and frontline staff and enhance their understanding of the client journey. Additional simulations that replicate the experiences of clients living in poverty can build empathy for clients, remind staff who they are helping and why they have chosen a career in public service, and encourage creative problem solving to reduce friction in the service delivery process.

Poverty simulations have been used with community and government agencies, for example in Fairfax County and Alexandria, to raise awareness and learn about resources available to families. A useful poverty simulation kit from the Missouri Community Action Network can be found here: http://www.povertysimulation.net/.

Customer Service

Human services agencies serve clients accessing services for a variety of reasons and with many different perspectives – whether they are voluntary or mandated; in crisis or trying to prevent one; seeking help for the first time or on an ongoing basis; long-time residents of the County or new immigrants; or fearful or trusting of government. No matter what circumstances bring a client into contact with an agency, the County strives to treat each client with respect and dignity, and offer them appropriate assistance to meet their needs. However, the day-to-day bureaucracy of service provision, high caseloads, and external pressures, can wear on employees and impact the quality of the services they deliver. Emphasizing excellent customer service through comprehensive initial training and periodic refreshers will help create a culture that values the interactions between staff and clients and encourages staff to hold each other accountable for high quality services. Training topics on general customer service may include:

- Being knowledgeable about program guidelines and requirements
- Following-up when client issues cannot be immediately resolved
- Client sensitivity and how it may impact interactions
- Body language and its role in communicating
- Telephone etiquette and dealing with sensitive issues on the phone
- Taking initiative to solve problems and resolve client issues

The Los Angeles County Department of Human Resources has developed a helpful Customer Service Information Guide for all employees that can be accessed here:
http://hr.lacounty.gov/wp-content/uploads/2015/09/CustomerServiceGuide20091208.pdf

Managing challenging behaviors and de-escalation techniques

Clients can demonstrate a variety of challenging behaviors when interacting with human services agencies, including behavior that is aggressive or unsafe. These may be driven by mental health issues, cognitive impairment, substance use, or just general dissatisfaction with services or programs. During our interviews and focus groups with staff and leadership, this issue arose as a particular concern of administrative and front desk staff who often interface with clients about eligibility, appointments, and health issues that can increase their frustration with services. These staff reported they lack the skills to manage these behaviors and de-escalate aggressive client behavior. While it is not their responsibility to provide treatment to individuals or take the place of emergency services, all staff can benefit from training to increase their knowledge of how to manage challenging client behavior. Crisis de-escalation training can help reduce the risk of injury to staff or clients, improve staff retention, and minimize agency exposure to liability.

The County has already invested in Crisis Intervention Training (CIT) for some law enforcement and staff at the Crisis Assessment Center. This type of training should be expanded to Human Services staff (and additional law enforcement personnel as appropriate) who frequently interact with clients who may become agitated, aggressive, or a danger to themselves or others. The County can explore universal trainings for all human services staff on topics like Mental Health First Aid which can equip all staff with basic skills to help a client in crisis and increase client and staff safety.

Cultural competency

While many human services agencies employ staff who are native Spanish-speakers, they may have different life experiences, and face a different set of challenges, than the growing numbers of immigrants coming from Central and South America who are fleeing widespread violence. Additionally, Prince William County is now home to numerous refugee populations from the Middle East and Africa. Additional training to enhance staff competency working with different immigrant populations can improve the quality of customer service, enhance client participation in services, and improve program outcomes. Cultural competency training should include background information on cultural groups who frequently interact with human services agencies including religious and cultural practices, languages and communication, gender and family roles, attitudes towards government and services, common myths and misperceptions, and community resources. Cultural competency trainings should be developed in conjunction with these communities represented in the training and in partnership with advocacy or community organizations that specialize in services for these populations.

Orange County (CA) has developed a successful cultural competency training that is offered regularly for both staff and the community. The training gives an overview of a culturally responsive approach to incorporate into service attitudes and interactions with clients to reduce the effects of stereotyping.

Implementation Plan

The implementation plan for Recommendation 3 includes the steps necessary to Use Trainings to Build Professional Skills of Staff, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all Human Services agencies will be involved in this implementation plan. In addition, the County Human Resources Training Coordinator and the DoIT will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Development of professional skills for staff across all agencies.
- Consistent messaging for staff around expectations for customer service.
- Increased staff knowledge of the work done at other Human Services agencies.
- Improved connections and referrals to relevant programs for clients.

Recommendation 3: Use Trainings to Build Professional Skills of Staff			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
3.1 ESTABLISH WORKING GROUP AND DEVELOP TRAINING FRAMEWORK	3.1.1. Convene HR working group and confirm that it has appropriate membership for this initiative.	Month 1	✓ Form a comprehensive workgroup with members who have the knowledge and power to make decisions about HS trainings
	3.1.2. Review implementation plan and identify which action steps should be completed by workgroup during meetings, what can be assigned as "homework," and what can be delegated to a leader(s) or agency staff.	Months 1-2	✓ Delegate responsibilities as appropriate to maximize efficiency
	3.1.3. Establish workgroup goals and identify selected trainings for the next year.	Months 1-2	✓ Ensure workgroup members are aligned in purpose and objectives
	3.1.4. Develop an outline for a training plan including objectives and questions that need to be answered. (See Appendix D for an example of what content to include)	Months 2-3	✓ Approach the adoption of new trainings in a uniform practice ✓ Training should meet the needs of current and new HS employees across agencies ✓ Offer training in a format that meets the needs of staff and facilitates learning ✓ Capitalize on existing resources
3.2 DEVELOP A PLAN TO DESIGN/ PROCURE AND DELIVER SELECTED TRAINING TOPICS	3.2.1. Develop a detailed training plan for each selected topic identifying known/unknown information.	Approximately 2-3 months per training selected	✓ A detailed training plan for each selected topic

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
3.3 DELIVER TRAININGS ON SELECTED TOPICS TO HS AGENCY STAFF	3.3.1. Deliver training utilizing the training plan developed for each selected training topic.	Ongoing	✓ High quality trainings will follow a consistent format and be delivered with fidelity and good outcomes
	3.3.2. Continuously monitor trainings for quality, satisfaction, and make updates as necessary.	Ongoing	✓ Trainings will be current and high quality

Dependencies	Implementation Resources
Requires a well-defined and functioning workgroup with strong leadership	Staff time
Where appropriate, trainings should meet requirements for CEUs or other credits for staff to achieve or maintain licensure or requirements for employment	Meeting space
Ensure that all HS agency staff can access trainings regardless of their agency (especially CSU, PWHD, and VCE)	Funding to support purchasing training curriculums from other agencies or vendors
All trainings (but customer service in particular) should align with the vision for Human Services in PWC (*Recommendation 6*) and the way in which HS agencies will evaluate the client experience (*Recommendation 7*)	Technology or physical resources to support online or in-classroom trainings
	PWC may be able to leverage internal resources at CS or DSS for some trainings as well as PWC University

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Staff may not see the value in attending new trainings or have the time available to attend them.** Especially in agencies where staff are dealing with heavy workloads, it may be difficult to make the case that they should take time away from their day-to-day activities to attend trainings**. Mitigation Strategy**: County and agency leadership will need to prioritize these trainings and work with staff to ensure that they are able to keep up with their workloads, while also explaining how these trainings can provide them with resources for their clients.

- **Similar trainings may be offered through EAP and PWC University but may not meet the needs of staff or be well-attended. Mitigation Strategies:** To avoid duplication of effort, the County should look to adapt currently available trainings to better meet staff needs, or encourage staff to attend trainings that are already available. In some cases, trainings may be appropriate for other County staff but not sufficient for Human Services staff; in those cases, the County may be able to justify adding a training that is similar but more comprehensive than what is currently offered.

- **Staff will have varying levels of experience and subject matter knowledge in trainings.** Trainings will need to be tailored to the level of experience that staff bring to each session. **Mitigation Strategy**: The County should consider providing multiple levels of trainings on the same subject (similar to a "101, 201, 301" course series that might be offered at a college), to ensure that all levels of staff are brought to the same baseline of knowledge.

- **Demand for trainings may exceed the capacity or funding available. Mitigation Strategies:** Depending on the type and frequencies of trainings selected by the working group, the County may need to deliver trainings in phases, prioritizing areas of greatest need. Another option is to create a multi-year plan for all-staff trainings that focus on one or more topics per year, while providing high-priority trainings on an on-going basis as needed.

Recommendation 4: Improve Interconnectedness at Entry Points

In developing the implementation plan for Recommendation 4, PCG determined that in order for the County to conduct the tasks required, it would make sense to first update and enhance current workflows, so as not to introduce inefficiencies from the current processes into the new business process. For that reason, we have moved that component of Recommendation 8, *Implement Workflow Efficiencies*, and its implementation plan, to this section.[9]

Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Improve Client Experience

Primary Criteria Met

- ✓ Positive impact on client experience
- ✓ Draws on best practices locally and nationally

The County should seek to improve interconnectedness of services so that they can capitalize on the following:

- Improved client and stakeholder outcomes and better serve citizens;
- Significant cost savings, cost avoidance, leveraging of additional resources, or new revenues;
- Improved internal business process; and
- Enhanced organizational and collaborative capacity.

Many counties across the nation have been successful in their integration of (health and) human services at entry. These include Dauphin County (PA), New York ODJFS, Monroe County (NY), Mecklenburg County (NC), and Sonoma County (CA). Detailed on the following page is an overview of Buncombe County (NC), who integrated their human services programs in 2005, and officially consolidated them in 2012.

The primary ways that agencies have been successful in aligning services is through the two main mechanisms of initial involvement for clients: on the phone and in offices. In the sections that follow, we detail our recommendations for a Human Services Information and Referral Call Center as well as integrated front desk entry points. However, before the County can achieve successes from better aligning services from both client and staff perspectives, there are several decision points that Leadership must consider.

1. **Agencies to Include**: The County can choose to include any combination of the following agencies, though we recommend including — at a minimum — the first three listed: AAA, CS, DSS, OHCD, and PWHD.

[9] Note: Implementation plans for Recommendations 4 and 8 have been renumbered from prior versions to reflect this update; section 8.1 from previous versions is included here as section 4.1, and subsequent sections have been updated accordingly.

2. **Program Integration**: Within the agencies that will be a part of this interconnectedness effort, the County should determine what programs are included and to what degree. We recommend considering all major programs across the agencies, though a slow implementation will need to occur to allow for staff to be trained and gain experience.

3. **Processes**:[10] Looking to AAA for guidance on what has worked well for information and referral (I&R) staff there, we recommend staff be trained to provide services across multiple programs, answering basic questions around waiting lists, services offered, process to apply, completing an initial assessment of needs, and providing information on application or program participation status where applicable. We recommend that staff start with more basic I&R tasks, over time shifting to having call center staff perform more complex tasks that include basic programmatic functions such as scheduling appointments and giving out case status information. This shift would require the use of phone queues, where some staff are dedicated to those additional tasks, and a robust phone tree to direct callers. Clients who need additional information should be transferred directly to someone on the program side for a warm handoff to program staff.

4. **Oversight Umbrella**: The County will need to answer the question of who would be the oversight umbrella for these staff and their leadership. While it is our recommendation that these staff be members of the Human Services Department (described in Recommendation 15) and not one particular agency, we understand that may not be simple to implement from the beginning. If moving to an integrated agency is not possible from the outset, County leadership will need to consider an oversight umbrella that will instill a culture and practices that are agnostic of agency, but will work hand-in-glove with the agencies supported.

Buncombe County (North Carolina) has aligned services across Human Services to improve client and stakeholder outcomes and better serve citizens. The linchpin of that effort was integrated customer service via entry-point/front door services combined into a single work unit: call center, intake, community service navigators, front desk, greeters, and interpreters for Human Services programs.

To ensure a more convenient, less time consuming, and increasingly integrative and helpful experience when clients seek services, Buncombe County developed a “no wrong door” philosophy. Since Social Services and Public Health, especially, have considerable client overlap, the County carefully redesigned its largest office space to offer integrated services for both Health and DSS in one location via a shared front desk entry point. One team of Front Desk and Greeter staff served an average of 340 clients per day in FY13 and answered over a thousand calls a day coming into one Call Center.

[10] It is worth noting that these process recommendations are not incongruent with the lobby workflow recommendations detailed in Recommendation 8. Lobby changes are able to be made more quickly with immediate impact while integration efforts at any centralized front desks will take longer to implement.

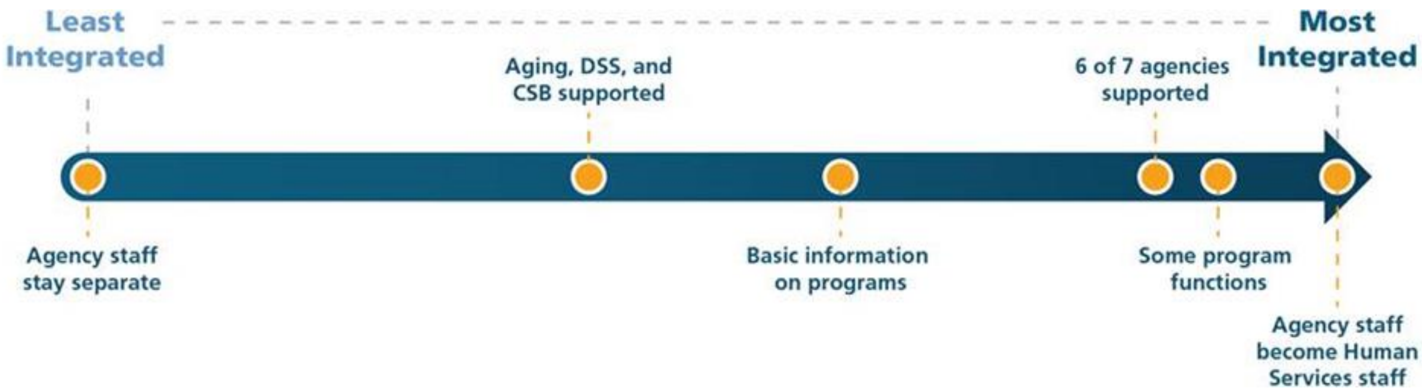


Figure 12. Checkpoints for agency integration.

DEVELOP A HUMAN SERVICES INFORMATION AND REFERRAL CALL CENTER

In an effort to reduce the complexity surrounding access to services, as driven by the 85 published phone numbers that exist presently, as well as a way to streamline the movement of shared clients across agency lines, PCG strongly recommends for the County to move to a single Human Services call center. When surveyed, 59 percent of clients who responded stated that they preferred to communicate with agency staff by phone, the largest share of the responses. A centralized Call Center model will cover the different programs under the same access umbrella. The goals of the Call Center would be:

- Offer general information and referrals for all human services programs and services;
- Serve as the single portal of entry for all human services clients on the phone;
- Meet the language needs of non-English speaking callers through multi-lingual Call Center Agents, or, if necessary, a translation service;
- Serve as a resource portal for staff who want to refer existing clients to other programs (relieving the pressure of all staff having to know more than what programs the county offers and having a standardized process for assisting clients with additional services);
- Provide basic level services and information (see below for more detail); and
- Be agnostic of the agency, but instead be holistically human services-focused.

Leadership should, collectively, develop goals and outcomes for a future state call center regarding customer experience. Based on successful public-sector call centers, we recommend using the following list as a guide:

One-Stop Access	Promoting Trust from Customers
Focused on Outcomes	Consistency is Key
Low Transfer Rate	Systems and Information Access (Internally) Across Agency Borders
Integrated Service Delivery	Clear Focus on Meeting Client Needs
Minimal Wait Time (<5 min) and Low Abandonment Rate (<8%)	Breadth of Programmatic Understanding
Driven by Data	Outstanding Customer Service

Figure 13: Common Call Center Goals

The Human Services Information and Referral Call Center will serve as an entry point to reach all programs under the HHS (and potentially later, the entire County) umbrella. This will create a seamless, more accessible, and more easily managed public interface for citizens to interact with the County. Phone calls will come into a single, public-facing number between 8:00am and 4:30pm Monday through Friday, and be routed to staff who are trained to answer questions and provide information across Human Services programs. For example, staff should be:

- Knowledgeable in all services that are offered;
- Well-versed in the basics of how to apply for services;
- Understand and be able to communicate clearly the program requirements for all programs;
- Understand the specifics of how to receive services (walk into a building, need an appointment, can apply online, need to get on a wait list, must meet eligibility criteria); and
- Have updated information on hours, days, schedule, and specifics of services (classes, locations).

In addition to meeting the language needs of clients, the Call Center should be designed to have a phone tree that directs callers to automated messages that can provide basic information: hours, locations, and other pertinent information. We recommend starting with a focus on general information and referrals. Staff in the Call Center, like the Front Desk staff described in the following section, are the forward-facing staff of human services agencies. They should be trained and knowledgeable in all the programs offered across the human services continuum and general access and program requirements. They should triage as much as they can and hand off to the individual agency staff only for more complicated matters.

When considering the transition to a Call Center environment, the County should, at a minimum, institute a feature that tells callers where they are in the queue, and also consider adding a "call back" feature. Both features will decrease wait times (and wait time frustration) in the queue and impact service level in a positive manner. Software can be programmed to inform callers of the estimated wait time and provide the client the option to opt out of waiting in the queue and receive a return call from one of the call center agents when they become available. When implementing this tool, it is important to correctly classify the call as answered rather than abandoned to ensure service level performance metrics are accurate. When a caller is placed on hold, educational messages giving answers to Frequently Asked Questions should be played in order to raise awareness, shorten call length or decrease additional future calls. A "Message of the Week/Month" functionality should be used to provide answers to callers responding to short-term call drivers creating volume spikes.

In addition, in the future, the County should consider staff with more depth and ability, as well as a queue-system to allow clients to quickly get to someone who is trained and able to conduct and discuss more case-related information, such as the ability to:

- Provide and receive client-level/case information;
- Make, cancel, request, or reschedule an appointment;
- Share individual and household changes;
- Perform renewals and reporting activities;
- Find out wait list status;
- Be automatically routed to customer support based on prompted requests, case status or other criteria; and
- Receive automated outbound calls providing appointment dates, wait list status, case status, or paperwork reminders.

In Fairfax County, VA, a **Coordinated Services Planning (CSP)** team operates a call center that helps residents connect to both county-based and community-based services. Call center agents work with callers to complete an assessment of needs and to provide links to programs that can help, and for which the callers may be eligible. This may include programs to help access emergency food, shelter, clothing, healthcare, employment, financial assistance or other needs.

Fifteen languages, in addition to English, are spoken by call center staff, ensuring that many callers can communicate in their native language without the need for a translation service.

STREAMLINE AND CONSOLIDATE FRONT DESK(S)

Prior to increasing interconnectedness at front desks, however, the County should make efforts to address areas where inefficiencies impact current process, so as not to allow them to be transferred from one agency to another. One effort that the County should explore is streamlining tasks at the DSS lobbies in Sudley North and Ferlazzo.

DSS should eliminate non-value-add steps in the current process and reconfigure staffing and tasks so that clients only need to talk to the Navigator and someone at the front window on each visit (unless the purpose of their visit is appointment or interview-based). Therefore:

- DSS should designate one of the clerical staff to serve as an **on-demand Navigator for the lobby**. There are a number of activities that occur without the need to spend time standing at the desk: accessing services on the phone, filing an application on the computer, telephoning a worker (though we hope to greatly reduce/eliminate the need for that with the below change). In addition, the Department should – in the future – consider a self-scanning station that allows clients to scan their documents directly into Harmony/DMAS. The Navigator is primarily responsible for:
    - Assisting clients with use of the computer or phone;
    - Making sure clients are properly routed;
    - Monitoring wait times and those who are waiting;
    - Closing/reopening additional windows as needed; and
    - Addressing any additional lobby-related issues.

- DSS should also consider **utilizing a decision-maker stationed at the front desk** who can quickly identify eligibility-type issues and simple interactions that can be addressed quickly (e.g. reporting an address change, picking up an application, dropping off verifications). This means that at least one eligibility staff should be posted at the front desk to assist with these activities. The only way this works without driving additional traffic to the lobbies is if the County implements this in conjunction with changes to back-end processes that reduce call volumes and/or performance metrics that drive changes in improving returned call rates. This could include other changes that decrease processing time or access to real-time status information for clients via self-service. Addressing these customers immediately in reception, or with dedicated staff to manage "fast track" transactions, provides more effective customer service and eases the burden on workers to focus on more substantive case issues. See below for a diagram of the updated process.

Figure 14. Diagram of future-state lobby flow at DSS Ferlazzo and Sudley North offices.

Going forward, national best practices tell us that clients experience better service and improved outcomes when they can access multiple, integrated services in one location, in one stop. As the County considers moving forward with plans to renovate or realign services at facilities across the county, we recommend consolidating front desks and "bundling" services so that clients can be seen at one entry point for each of the main 2-3 locations (Ferlazzo, Sudley North, and Mid-County). Beginning the moment a client enters one of these main facilities, they should see and be greeted by integrated front desk staff who are agnostic of agency. Staff should work closely together given the integrated nature of the positions to address single as well as holistic client needs at this point of entry. When moving forward, considerations for the integrated front desk include:

Key Consideration	Detail
Traffic Flow	Agency leadership will need to develop an updated process of "directing" traffic in the integrated lobby to ensure that people and flow are managed efficiently. This can be done through a number of ways: • If client volume and capacity dictate, **kiosks** can be used to direct clients to windows where staff can effectively and efficiently meet their needs. • A **Navigator** can assist clients with the kiosk (we have found that clients are disinclined to use a kiosk without help, rendering it almost completely useless). • Through a **triage** process (with the kiosks or without), people who are there to drop off paperwork, check-in for an appointment, or other quick service items can be triaged efficiently without significant wait.
Signage	As noted in Recommendation 1, signage both in the building, to the lobby, and the windows where clients are served is incredibly important to help clients correctly navigate where they are going and locate the lobby, bathrooms, or self-service items such as computers, phones, pamphlets or applications.
Technology	In addition to adopting a robust Workflow Management System (F 8) that will allow front desk staff to efficiently and effectively move clients to the correct place, the County should ensure that staff have access to and training on all needed state and local systems.
Training	In much the same way that Call Center staff will need to be trained in all programs, so will Front Desk staff. They will need customer service, programmatic, and IT training for all of the agencies they serve.
Layout	The County will need to be cognizant of the layout of the integrated lobby: • Clients will need access to facilities; • The layout and chairs should accommodate people with strollers and physical disabilities; • Lighting should be bright and welcoming; • Computers and phones should be easily accessible but placed away from main traffic for confidentiality; and • Staff should be safe and secure, but not to the extent that clients are made to feel like second-class citizens.

In addition, we know based on experience, human services entry points are most effective when they have trained and staffed the operation appropriately; developed refined Standard Operating Procedures (SOPs); and implemented technology to support dynamic staff scheduling, call/task tracking, performance monitoring, and reporting. The below list is not meant to be inclusive, but to note key components of both successful Front Desks and Call Centers for the County's consideration.

Technology

For a call center, advanced technologies are allowing agencies to move to Cloud-based services and multi-channel integration, which has given agencies the ability to provide multiple avenues to service customers. Cloud Services mean organizations are no longer restricted to brick and mortar locations where the staff are all located together allowing more flexibility in hiring and staffing. Multi-channel integration has become key as customers expect fast and quality service regardless of the avenue they choose to contact Customer Service. In addition, advancements in technology mean that Internet technologies like Voice over Internet Protocol (VoIP) do not require the call center to go through the telephone company directly to connect with callers. Hosted service providers can offer all the components of a call center infrastructure as a standard service provider. Agencies with these solutions are not required to have and manage large amounts of equipment that make up traditional call center infrastructure.

For the front desk, a Workflow Management System (see Recommendation 8) will be integral to the success of being able to route people and paper throughout the agencies served.

Performance Metrics

Working to ensure that reporting dashboards are developed and consistently used is a major part of this process. A balance between quantitative and qualitative measures is also important. Placing too much emphasis on quantitative metrics can lead to poor quality of service. Front desk and call staff can sometimes find it easy to take shortcuts and provide minimal service which leads to unresolved issues, bad customer experience, and repeat interactions. To ensure quality, customer interactions need to be monitored, tracked, and made part of the review process. Place too little importance on quantitative measures — while quality may be high for those who are able to get through — and abandonment rate will increase, customer complaints will rise, and performance measures will decline. Below are examples of performance measurements that the County should adopt:

- **Call Center Staff Utilization.** Utilization is a metric that compares the time an agent is in an active call state (on a call, after call wrap-up or waiting for a call) versus the total time logged into the system.
- **Average Call Handle Time (AHT).** This metric consists of talk time plus after-call work (wrap-up time), and is a factor used in determining overall workload and staffing requirements.
- **First Call Resolution (FCR)**. FCR (the percentage of customers who achieved call resolution in one call) is directly aligned with better service levels, reduced operating costs, higher customer satisfaction, and higher employee satisfaction. This also applies for staff at the front desk.
- **Average Wait Time**. This is the average amount of time that callers wait in the queue before speaking to a live agent.
- **Overall Customer Services**. This is the way the client was treated and whether or not the information they got was correct and all of their needs were addressed. Measures that can be used to gauge customer service can be either quantitative (such as those listed above), or qualitative (such as a survey asking for a client's opinion on the level of service received).

Change Management and Processes

To combine different processes that are currently performed by different programs, there will need to be a comprehensive change management effort. Agencies should be strongly encouraged to: think broadly, cleave with old processes and ways of doing business, make decisions based on the holistic needs of clients, remember change doesn't have to happen overnight, look outside the walls of their program, and — most importantly — surrender to the greater organizational goals.

As a part of the effort to bring staff from multiple agencies together to serve as one, the County will need to develop an SOP guide for both the Call Center and Front Desk that can be used by anyone to describe information related to the goals and purpose of the operation structure, target service levels, performance expectations, client interaction and handling procedures, scripts, and onboarding/training across program areas. SOPs should be included in the guide, but also be able to stand alone as quick resources for staff to understand and execute a process step by step.

Training and Staffing

As SOPs are developed and performance measures are standardized and set as targets, leadership and staff should be comprehensively trained in all of the tools available to them, from systems used to applying data to supervision of individual staff. These trainings should apply to all staff to ensure consistency in application. In addition, protocols and messages should be developed that provide clients with consistent messages and direction for following up with the agency and what to expect in terms of case processing and the receipt of documents. The County will need to carefully select/hire staff, considering customer service experience and abilities, as well as programmatic knowledge and whether they can assimilate to the integrated culture. PCG can assist the County with estimating and scaling-up staffing, but going forward the use of data will allow both the Front Desk and Call Center to manage staffing levels to forecast the need for boosting or reducing staffing based on the total client volume. After reviewing the peaks and valleys of volume, the County should work to adjust staffing levels to match. As a part of this, the County can pilot using part-time or temporary staff positions to augment staff if needed. In addition, the County can use this data to start expanding beyond normal business hours a few times a week to see if there is a great demand from clients for accessibility during these hours.

Implementation Plan

The implementation plan for Recommendation 4 includes the steps necessary to Improve Interconnectedness at Entry Points, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

In developing this plan, PCG determined that in order for the County to conduct the tasks required to implement Recommendation 4, it would make sense to first update and enhance current workflows, so as not to introduce inefficiencies from the current processes into the new business process. For that reason, we have moved that component of Recommendation 8, *Implement Workflow Efficiencies*, to this section. We have renumbered this piece of the implementation as part of Recommendation 4; the remaining components of Recommendation 8 follow later in this document.

Agencies Involved

It is anticipated that AAA, CS, DSS, OCHD and PWHD, along with Public Works, DoIT, Human Resources, and Communications will be involved in this implementation plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Client access to services will be streamlined thanks to simplified traffic flows in buildings and lobbies.
- Wait times for services will be reduced.
- Clients that access services through more than one agency will not need to make multiple calls or visits to find out their program status.
- Staff telephone and walk-in administrative burden will be reduced, allowing them to spend more time on processing.

Recommendation 4: Improve Interconnectedness at Entry Points and Eliminate Non-Value Add Steps from Current Process			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
4.1 RESTRUCTURE EXISTING WORKFLOWS - ELIMINATE NON-VALUE ADD STEPS FROM THE CURRENT PROCESS	4.1.1. Convene Client Experience working group to guide the implementation of this recommendation.	Month 1	✓ Appropriate agency staff included in plan activities
	4.1.2. Conduct survey and interviews to validate and fully understand why people come to existing offices, and review any existing data on the reasons people visit a physical location. • Develop tool to be used by front desk staff at both Sudley and Ferlazzo. • Discuss with front desk staff purpose and use of tool. • Implement tool for 30 days, refining/narrowing at the midpoint as needed.	Months 2-3	✓ Validated lobby traffic numbers ✓ Understanding of the universe of current data being collection around client office visits
	4.1.3. Assess data (cutting and analyzing by agency, by time (month, day, year), as well as other permutations).	Month 3	✓ Improved understanding of *why* people come in ✓ Ideas for reducing lobby traffic ✓ Better understanding of traffic flow, volume, and in-front-of-the-desk needs to adjust staffing ✓ Determination of which activities could be accomplished without coming in, standing in a long, line, waiting, through better signage, or speaking to someone at the desk
	4.1.4. Create updated process flows and SOPs for the front desk (based on activities people come in for). These can/should include activities that route people more quickly (such as triage) who have simple needs.	Months 4-5	✓ New or updated policies and SOP documents

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.1.5. Identify stakeholders for communication and prepare change management schedule and communication plan including: • Email design / layout template • Email language to be used for each stakeholder group, including translation into other languages as necessary • Communication schedule • Dedicated inbox to receive inquiries related to changes • Handouts/flyers describing coming changes	Months 4-5	✓ Communicate coming changes to mitigate risk and concern and begin educating staff and the public of what to expect during and after implementation of new processes
	4.1.6. Engage with facilities staff to develop new/updated signage (for example, for triage/express, update current signage as noted in Recommendation 1).	Months 4-5	✓ Improved / updated signage
	4.1.7. Designate new staff for in-lobby navigation as needed and train all front desk clerical staff to: • Assist clients with use of the computer or phone • Make sure clients are properly routed • Monitor wait times and those who are waiting • Close/reopen additional windows as needed, and • Address any additional lobby issues	Months 4-5	✓ Navigators trained and ready to provide high level of customer service
	4.1.8. Post at least one eligibility staff member at the front desk to assist with eligibility-type issues and simple interactions that can be addressed quickly.	Month 6	✓ Front desk eligibility staff should assist with: ○ Address changes ○ Application pick up ○ Verification drop-off
	4.1.9. Implement changes to lobby workflows.	Month 6	✓ Decreased wait times and improved client satisfaction with services

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.1.10. Track wait times and seek/record client feedback to monitor effectiveness of Navigator and of maintaining an eligibility staff member at the front desk.	Ongoing	✓ Improvements and impact of changes on lobby traffic flow and overall client experience identified
4.2 IDENTIFY AREAS TO INCREASE INTERCONNECTEDNESS	4.2.1. Convene Client Experience working group; be sure group includes, at a minimum, AAA, CS and DSS, and all agencies that share a particular space for maximum impact. 4.2.1.a. These efforts could include both the Human Services Call Center and the consolidated front desks	Month 3-4	✓ Appropriate agency staff included in plan activities ✓ Work builds on efforts in Task 4.1.
	4.2.2. Determine if any programs should be excluded from interconnectedness effort (due to complexity, need for specialized interactions, confidentiality, or other reasons).	Month 1-2	✓ The universe of programs that will utilize cross-agency communications is identified
	4.2.3. Building on the information gathered in step 4.1.2., determine the kinds of inquires that interconnected staff could respond to for each agency, and the level of training that would be required.	Month 1-2	✓ The level of information that will be shared by staff across agencies will be identified ✓ The intensity of training required for these staff will be identified
	4.2.4. Develop phased timeline for the expansion of services provided by interconnected staff.	Month 3	✓ A plan will be developed to have staff sharing information across agencies to begin with simple information, such as where to go to receive services, and progress to more time and knowledge - intensive tasks, such as case lookups or entering data into a data-collection template

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.2.5. Client Experience working group will work with, and Leadership Group will decide on, the appropriate level and type of oversight for staff who provide support for multiple agencies, such as: • Creation of a new unit • Management by current agencies • County-level oversight	Month 4	✓ Oversight for call center or other cross-agency staff is established
4.3 ESTABLISH HUMAN SERVICES INFO AND REFERRAL CALL CENTER	4.3.1. Working group should set priorities for call center activity, thinking through the following: • Kinds of calls expected / directed to the line • Whether or not the call center is expected to provide a resolution (this will result in longer call times) • Which agencies will be utilizing the call center (this will impact call volume) • In order to determine the anticipated number of calls, the County should collect data from front desk staff as to the number of calls currently received per day for several weeks. • How client satisfaction will be measured The County may wish to approach this like a pilot program, starting the call center with a limited number of call types and expanding to additional call types once the center is established. If possible, during this step, the working group should map out the multiple levels of services that the County will seek to implement over time.	Month 4-6	✓ Clear priorities and goals for call center ✓ Phased approach to implementing call center duties

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.3.2. Develop metrics for expected call center agent performance including: • Average handle time • First call resolution expectation • Overall calls per day handled by call center • Client satisfaction (measures by post-call follow up) The County should draw upon experience with Coordinated Entry call center to help determine areas of priority within these metrics.	Month 4-6	✓ Clearly defined expectations for the call center, in terms of the types of calls to be handled and how they are expected to be resolved (e.g., short calls focused on referrals, or longer calls that get into more case specifics)
	4.3.3. Working group to identify staffing and technology needs and costs to stand up call center. • The County can plug the data gathered in step 4.1.1. and the metrics developed in step 4.3.2. into an Erlang calculator to determine the optimal number of staff required to hit targets. • The number of staff required will allow for an accurate estimate of call center equipment required.	Month 6-7	✓ Call center resource needs are established and tied to the level of services that will be provided
	4.3.4. Identify location and equipment needs for call center, dependent on number of staff and available space. Ideally the location will be centrally located to attract the widest array of candidates to staff the center.	Month 6-8	✓ Physical location for call center is established. The County will determine whether the location should be a current county office location or a newly acquired (purchase or rental) location
	4.3.5. Develop clear guidelines for staff about what kinds of calls should and should NOT be sent to call center. County should make clear that clients with an assigned caseworker should contact that person whenever possible.	Month 6-8	✓ Roles for call center and caseworkers are defined ✓ Staff are aware of the proper situations to transfer or direct a caller to the call center

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.3.6. Determine when and how to add additional features to call center system and how to communicate the benefits of those features to clients and staff. • Notification of position in queue to manage wait time expectations • "Call back" feature to reduce need for callers to wait on hold	Month 8-9	✓ Additional call center features are identified ✓ Implementation schedule of various features is established
	4.3.7. Create job description for call center agent, drawing on any relevant current positions at county agencies, such as current Coordinated Entry call center staff. See Appendix G for a list of skills and duties that are often included in call center agent job descriptions.	Month 8-9	✓ Call center agent job description is complete and draws on performance metrics established in step 4.2.2.
	4.3.8. Hire and train call center agents so that they: • Are familiar with the specifics of the programs they are supporting • Are comfortable using the call center technology • Are aware of their performance targets and what they need to do to achieve them • Can provide the level of customer service desired by the County.	Month 10-12	✓ Call center is staffed, agents are trained, and agents and other agency staff are clear on how and when to direct callers to call center
	4.3.9. Develop scripts for call center agents and for other agency staff who may transfer calls to call center.	Month 10-12	✓ Call center agents have clear instructions for addressing calls ✓ Agency staff are clear on how to transfer calls to call center

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.3.10. Develop transition plan for bringing call center online, including: • Internal and External communications plan • Staffing plan • Go-live date • Outreach to community stakeholders • Any additional facilities work that needs to be done, including: ○ Furnishing call center space (desks, chairs, etc.) ○ Expanding phone system ○ Procuring agent equipment (phones, headsets, etc.)	Month 10-12	✓ Consistent internal and external communications around call center developed ✓ Call center is introduced across agencies, internal and external stakeholders ✓ Call center facilities work completed and go-live date is identified
	4.3.11. Call center goes live; data analysis and continuous improvement efforts are ongoing.	Month 12	✓ Call center is operational ✓ Performance metrics are monitored and adjusted regularly to ensure center is meeting needs of agencies and clients
4.4 STREAMLINE AND CONSOLIDATE FRONT DESKS	4.4.1. Identify physical locations within Ferlazzo and Sudley North where consolidated front desk could be situated.	Month 4-6	✓ Candidates for “consolidated front desks” are identified and move forward with planning
	4.4.2. Add signage in these buildings to direct clients to front desk, then on to agency offices if necessary.	Month 6-7	✓ New work flows for these sites are developed, minimizing client travel through buildings

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	4.4.3. Incorporate additional elements to assist with traffic flow: • Kiosks, that are focused on self-service tasks and providing clients with information • A Navigator staff position, to assist with kiosks, self-service tasks (such as dropping off paperwork) and general traffic direction • Triage staff, to conduct a brief review of client information that resolves an immediate issue, beyond simply accepting paperwork or directing clients to another office The County may wish to start with the consolidated front desk and then add these components over time after assessing staff and client response.	Month 6-12	✓ Services that will be provided by consolidated front desks are identified ✓ Additional equipment needed to support these services is identified
	4.4.4. Identify and address facilities needs to establish consolidated front desks in each location • Desk equipment / furniture • Location of consolidated desks • IT / phone equipment or setup needs	Month 6-12	✓ Facilities supporting consolidated front desks have the physical and IT resources necessary to assist clients
	4.4.5. Transition and train current administrative staff to consolidated front desk positions.	Month 12-14	✓ Staff are in place and trained on their duties and responsibilities at the consolidated front desk
	4.4.6. Establish go-live date for consolidated front desks and develop and share communications plan for stakeholders.	Month 12-14	✓ Start date for consolidated front desk, and the changes that will impact agency / County stakeholders, are established and communicated

Dependencies	Implementation Resources
Ability / willingness to make physical changes to building layouts	Physical / IT resources to “create” front desks
Willingness of agencies to participate in consolidated front desk effort	Staff to serve at consolidated front desks
Each agency involved will need to contribute staff, staff time, and training resources	Staff / leadership time to serve on working group
Call center staff will be County employees (no outsourcing)	Supervisory oversight for new staff
Decisions made in step 4.1.5 (level and type of oversight)	Adjustment of FTEs to staff call center (or additional FTEs)
Level of services to be provided via call center	Facility for call center and additional call center equipment
	Staff to serve as call center agents (and supervisory staff)

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Staff may not volunteer for consolidated front desk coverage.** Staff may not embrace the change to a consolidated front desk, and may not wish to take on any different duties from their current work. **Mitigation Strategy**: The County must determine whether job descriptions must be altered to meet these new staffing needs with current staff members. Similarly, if there are no experienced staff available to support the consolidated front desk, the value to clients will be low until staff are properly trained and “seasoned.”

- **Interconnectedness may pose IT and physical space challenges.** The County Facilities team will need to be part of this project from the earliest stages, to help determine where and how changes to the physical space should go. Likewise, DoIT staff can provide support to determine the equipment that will need to be set up in shared lobby spaces.

- **A consolidated front desk has the potential to create an additional touchpoint for clients with little perceived benefit.** If all clients are required to "check in" at a main lobby desk and then wait a 2nd time at the specific agency lobby, they are not likely to see the change as a positive. **Mitigation Strategy:** The County must make sure that if the consolidated front desk can't solve a problem, the client is referred on to the correct agency with little to no wait.

- **The call center may end up fielding calls that should go to caseworkers, if clients can't reach them**. Likewise, it is important to ensure that the call center does not begin operating outside its scope, and handling calls that should be directed to caseworkers. If that happens, it will quickly become overwhelmed with people trying to reach their caseworkers and will be unable to provide assistance to those it is intended to support.

Recommendation 5: Make Information Readily Available and Accessible to Clients

Primary Goals Achieved

- ✓ Improve Client Experience
- ✓ Realize Operational Efficiencies

Primary Criteria Met

- ✓ Draws on best practices nationally and locally
- ✓ Utilizes creative and innovative solutions

Human services can be a challenge to navigate, especially for those new to the service, system, or county. Without knowing what to look for, clients may not know what is available to them or what they may qualify for. Providing this information and educating the public of the County's services helps clients to seek out services and improve their experience of navigating services. It also shows the public that the County can be a trusted partner if or when they should ever need to access services.

INCREASE CLIENT SELF-SERVICE

There are several options the County should consider adopting in order to increase clients' ability for self-service or communication with staff in an alternate manner. Human services-wide use of outbound call campaigns or text messaging for appointment reminders, recertification reminders, or other easily-automated functions will be extremely helpful in decreasing call, intake, and no-show volumes. In addition, use of chat functions, social media, or even a County smartphone app can help further reduce as well as offer service outside of business hours.

Self-service options, when properly implemented alongside complementary, self-learning knowledgebase technology, can help agencies achieve much higher self-service rates (up to 90 percent), allowing agencies to optimize their customer experience within their existing resource constraints.[11] It is important when considering self-service options that the County ensure that whenever possible, tasks can be completed through a single channel. In many cases, applicants or clients will not "switch channels" (e.g., go to an office to complete and application that was started online) if required to do so, negating the value of the self-service option and increasing client frustration.[12]

INCREASE TRANSPARENCY WITH A CLIENT PORTAL

An online, client portal would allow clients to track the status of their applications without calling or visiting in person to follow up. It reduces the administrative burden for staff during application processing by proactively making this information available to the client. A more robust portal could also allow clients to schedule appointments, view their case file, and upload pay stubs and other required documentation directly.

In the same way that DSS currently uses CommonHelp as a client portal to VaCMS for clients to apply and receive benefits, an external vendor could be contracted to provide a client portal that integrates with county systems, allowing for information sharing between the portal and county systems. A client

[11] Oracle white paper: http://www.oracle.com/us/products/applications/8-steps-cust-exp-gov-wp-1560471.pdf.
[12] https://www.mckinsey.com/industries/public-sector/our-insights/implementing-a-citizen-centric-approach-to-delivering-government-services.

portal solution may be web-based, but could also include a mobile application to help the County further reach the public with additional mediums for providing information on services, renewal deadlines, group schedules, and easy access to update consent forms and submit information for benefits and case files.

When considering a client portal, there are several options:

- If determined to be possible, enhance existing technology to support the more robust needs of all County human services entities.
- Purchase a Commercial Off-the-Shelf (COTS) solution that will require a degree of configuration to support the number of services available.
- Develop a new, custom solution to provide the County an opportunity to tailor a solution to meet all programmatic needs.

Further analysis will need to be completed to establish the option that best meets the County's business priorities while being financially feasible.

TEXT REMINDERS FOR SCHEDULED APPOINTMENTS AND BENEFITS OR PROGRAM RENEWAL

Text reminders offer an important nudge that is effective in reducing the number of "no-shows" for appointments. When clients do not reschedule or show for their appointment, it costs staff time and overall efficiency in their ability to manage their work. Likewise, for benefits, confidentiality forms, and other program renewals, text reminders can help reduce the administrative burden of mailing reminders, back-and-forth phone calls, and missed deadlines. An automated scheduling service, which typically involves a data transfer or software to schedule and send text reminders when an appointment is made, could help reduce the number of "no-shows" and improve staff efficiency. A number of agencies offer services by appointment only. Below is a list of services that could use text reminders for their appointments.

Agency	Service by Appointment
DSS	• Case Management • Public Benefits (SNAP Renewal, Medicaid Renewal, etc.)
CS	• Case Management • Toddler and Infant Early Intervention Services • Development Disability Services • Mental Health Services • Substance Abuse Services • Vocational Services • Psycho-Social Rehabilitation Services • Youth Services
AAA	• Case Management • Meals on Wheels
VCE	• Parent Education • Financial Education and Assessment • Housing Counseling
PWHD	• Onsite Sewage • Onsite Inspections • Nursing Home Screenings

Agency	Service by Appointment
	• Clinical Services • Women, Infants, and Children Services • Nutritional Education
CSU	• Probation and Parole • Public and Community Service
OHCD	• Housing Choice Voucher Case Management • First-Time Home Buyer Program • Home Investment Partnership Program

UTILIZE KIOSKS TO PROVIDE INFORMATION

Another way to enhance the County's community presence is to station touchscreen information kiosks in downtown areas. New York City has implemented LinkNYC kiosks to replace payphones. The kiosks offer free phone calls, free Wi-Fi, an emergency 911 button, USB charging docks, and maps, in addition to public service announcements and information on how to access city services.

The County could station a few, simpler kiosks in high pedestrian-traffic areas to provide information on county services, directions and transportation information to county buildings, real-time availability at local shelters, public service announcements, and announcements for classes and group meetings. The kiosks could be located at the main county buildings, the mall, or the County could partner with Manassas and Manassas Park to locate them in downtown areas and help guide clients to the correct services based on their zip code.

Implementation Plan

The implementation plan for Recommendation 5 includes the steps necessary to Make Information Readily Available and Accessible to Clients, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all Human Services agencies, along with Communications, will be involved in this implementation plan. In addition, county DoIT staff will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Clients will have easier access to basic information about their cases.
- Clients will have additional options for communicating with the County, reducing their need to call or visit an office.
- Fewer missed appointments will result in increased staff productivity.
- More clients who cannot attend a previously scheduled meeting will contact the County in advance to reschedule because they've received a reminder.

Recommendation 5: Make Information Readily Available and Accessible to Clients			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
5.1 INCREASE TRANSPARENCY WITH A CLIENT PORTAL	5.1.1. Convene IT working group under the leadership of the project manager. Ensure that it includes staff with experience implementing client-facing software solutions.	Month 1	✓ Formation of a dedicated project team with relevant technical expertise
	5.1.2. Define goals, expectations, and outcomes of a client portal. This should include data collection and outreach to both internal and external stakeholders to determine: • Tasks that they would like to complete via "self-service" • The kinds of information clients seek when they call or visit agencies • Actions that currently require multiple steps or points of contact to complete.	Months 2-3	✓ Clearly defined goals, expectations, and outcomes for the client portal ✓ Research that indicates the level of interest for additional self-service options
	5.1.3. Conduct research on other agencies that utilize a client portal to determine which functions they have moved to the portal, and to understand how their clients interact with the system.	Month 4	✓ Clear understanding of the potential benefits to the client experience, as well as potential pitfalls
	5.1.4. Work with county DoIT staff to determine whether there are other self-service activities that can be added to current system functions, such as: • "Dynamic FAQs" for agency websites, which populate based on items most frequently searched for by visitors to the website • Additional utilization of the website and social media to share agency-specific messages • An online "chat" function that could serve as an alternative to phone calls or e-mails.	Months 4-6	✓ Additional options that may be implemented prior to acquisition of new client portal are identified and decisions made whether or not to pursue

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	5.1.5. Work with county DoIT staff to narrow the field of options for a client portal application across the following: • Building on current county technology • Purchasing a Commercial-Off-the-Shelf solution that meets many of the County's goals for the portal • Purchasing and / or developing a custom solution that meets most, if not all, of the County's needs and goals.	Months 4-6	✓ Selection of the type of client portal solution to pursue
	5.1.6. Working with county DoIT staff, develop a scope of work that can be used to purchase or procure the type of application selected in step 5.1.5.	Month 7-8	✓ Scope of project is completed and ready for inclusion in RFP
	5.1.7. If purchasing an IT solution, begin procurement process by taking the following steps: 5.1.7a. Seek Technical Review Board approval 5.1.7.b. Seek approval from IT Advisory Committee 5.1.7.c. Secure project on TIP for upcoming FY 5.1.7.d. Seek TIP approval 5.1.7.e. Develop and publish RFP 5.1.7.f. View products and award contract	Months 8-12	✓ Completed procurement process ✓ Acquisition of desired client portal solution
	5.1.8. Develop implementation plan for new system with vendor, county DoIT staff, and IT working group, including: • Set-up and testing of IT solution • Training for staff • Communications materials for clients and stakeholders • Phased go-live plan for different elements of portal	Months 11-13	✓ IT solution is implemented ✓ Staff and other stakeholders have received necessary training ✓ New access point is communicated to potential users
	5.1.9. Go live with new client portal IT solution.	Month 14	✓ Client portal can be accessed by public

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
5.2 DEVELOP TEXT REMINDERS FOR SCHEDULED APPOINTMENTS AND BENEFITS OR PROGRAM RENEWAL	5.2.1. Convene IT working group with membership from all agencies and with DoIT representation.	Month 1	✓ Formation of a dedicated project team with relevant technical expertise ✓ Goals defined ✓ Work aligned with larger changes/projects happening within the County
	5.2.2. Determine which clients and programs would most benefit from this (scheduled appts, benefit reminders, class reminders, etc.). Use no-show and failure-to-comply data to drive decision-making. Look to the current scheduling system used by Fire and Rescue, called *Appointment Plus*, for example.	Month 2	✓ Programs that are good candidates for text reminder services are identified, and agencies included in planning process
	5.2.3. Develop goals and specifications around product needs.	Months 3-6	✓ Clearly defined goals, expectations, and outcomes for the text reminder service
	5.2.4. Working with county DoIT staff, develop a scope of work that can be used to purchase or procure a produce that meets the needs identified in step 5.2.3.	Months 6-7	✓ Scope of project is completed and ready for inclusion in RFP
	5.2.5. If purchasing an IT solution, begin procurement process by taking the following steps: 5.2.5.a. Seek Technical Review Board approval 5.2.5.b. Seek approval from IT Advisory Committee 5.2.5.c. Secure project on TIP for upcoming FY 5.2.5.d. Receive (or not) TIP approval 5.2.5.e. Develop and publish RFP 5.2.5.f. View products and award contract	Months 8-12	✓ Completed procurement process ✓ Acquisition of desired text reminder solution

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	5.2.6. Customize selected product to further align product with goals and specifics of the need in Prince William County.	Months 12-14	✓ Additional changes/modifications are made
	5.2.7. Identify phone number fields and set up data import batches.	Months 12-14	✓ Correct data feeds are finalized
	5.2.8. Test final product.	Months 12-14	✓ Final product has been viewed and tested
	5.2.9. Develop any internal process changes needed (such as collection of phone numbers where none had been collected before as well as develop authorizations to enroll in texting program).	Months 12-14	✓ Process changes are developed and integrated into current business processes
	5.2.10. Prepare to go live, including the following steps: • Training for staff as necessary • Communication to clients and stakeholders about the benefits of this service and how to opt-in / opt-out • Set "go-live" date.	Months 15-16	✓ Go live date is set and implementation commences

Dependencies	Implementation Resources
New technology must align with current county and state systems	DoIT staff and expertise during procurement and implementation
Up to date phone / contact information needed for reminder system	Funding for portal and reminder technology
Client portal must be publicized and included in county communications outreach efforts	Resources (either staff or financial) to train staff on new systems

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Agencies may have varying needs or requirements for IT solutions.** Sharing solutions across agencies is cost-effective, but cannot happen if the agreed upon solution does not meet the needs of each agency, from either a programmatic / regulatory standpoint or a business process standpoint. **Mitigation Strategy**: The County should look to identify areas of commonality across agencies early in the process and focuses on those tasks when seeking IT solutions.

- **Communications efforts are critical to driving client utilization of self-service systems.** If clients are not aware of self-service options, or they find them too confusing or ineffective, they won't use them, and the County will be burdened with an expensive system and no reduction in calls or office visits. **Mitigation Strategy**: The County must communicate early and often with clients and stakeholders, gathering input around desired features and usability, and providing clear instructions for use and clear expectations for the types of tasks a client can expect to complete using these new tools.

Recommendations 6 and 10 (combined): Articulate Shared Vision and Establish Shared Measures

Primary Goals Achieved

- ✓ **Increase Integration and/or Alignment of Services**
- ✓ **Adopt Innovative Practices**
- ✓ **Improve Client Experience**

Primary Criteria Met

- ✓ **Draws on best practices locally and nationally**
- ✓ **Impacts multiple agencies**
- ✓ **Aligns with vision, mission and goals of County**

The County recently completed a strategic planning process that includes a clear vision statement for the County as a whole, as well as one plan element and several strategic outcomes dedicated to “well-being,” in large part focused on human services. As a part of “integrating” Human Services, physically or simply through a shared vision/outcomes, county and agency leadership must determine how to translate county-wide goals, and longer-term expectations for the provision of human services in the County, to this new department, and to the work that each agency will continue to carry out. The strategic plan is an important place to start, but in order for human services agencies to produce more than the sum of their parts, the County must take three crucial steps:[13]

- Establish a shared vision
- Establish vision for each agency and their role for achieved the shared vision
- Acknowledge change management needs

ESTABLISH A SHARED VISION

Human Services must create an overarching vision for the work that it is bringing human services agencies together to do. This vision should expand beyond the outputs or outcomes of any one agency, and focus on community-wide outcomes that each agency has a role in achieving. The development of this vision should include staff, leadership, clients, and community partners, and should reflect a shared understanding of the future state of the population served by county human services agencies. When developed in an inclusive and thoughtful manner, a shared vision can help rally support for change and provide a clear indicator of what an organization stands for and seeks to accomplish. Many of the outcomes included in the current strategic plan reflect a broader vision for county human services, and should serve as the starting point for discussions for this shared vision, in addition to the following:

- **A shared strategy** considered important by staff and stakeholders across human services;
- Well-defined, **practical criteria** to guide prioritization and design of change efforts;
- **Inputs or resources** needed to implement the strategy;
- **Performance capacity** or the ability the organizations in the system have to advance toward outcomes;
- **Performance actions** or activities implemented to achieve outcomes;

[13] Information in this section adapted with permission from an original by the American Public Human Services Association. All rights are reserved.

- Outputs or results of **system performance**;
- Outcomes or **changes in lives** as a result of system performance; and,
- A process to get continuous **feedback from clients, staff, partners, other key stakeholders**, and the community about how well the system is achieving its desired outputs and outcomes.

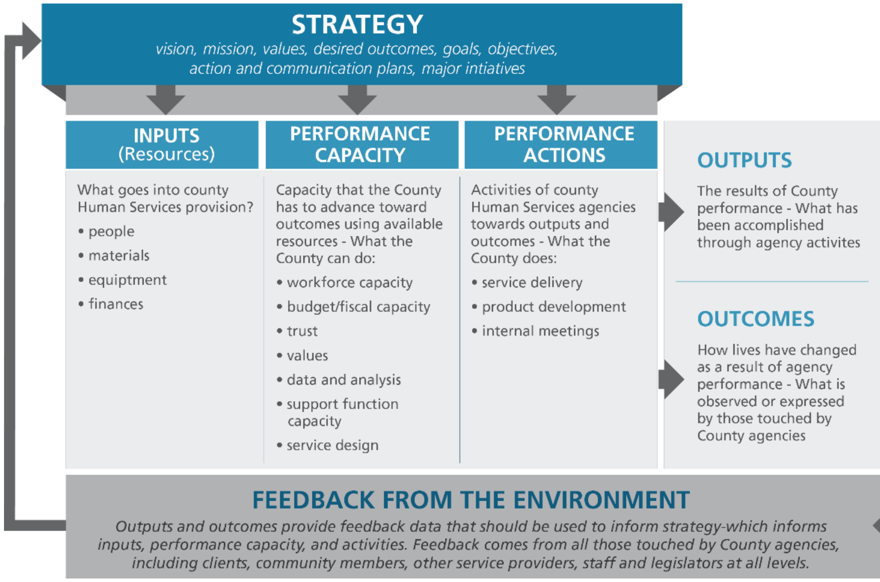


Figure 15. Strategy and shared vision logic model.

The chart in Figure 15 at left provides a visual representation of the way that a shared vision and strategy can filter down through all aspects of an organization's activity. As part of a broader continuous improvement effort, the outputs and outcomes generated by agency activities, along with feedback from relevant stakeholders, should feed into a regular review of the vision and strategy to ensure that it is leading the County towards its stated goals.

Once the vision has been developed, keeping the focus on the vision is just as important. New staff should be presented with the vision soon after starting; the vision should be referenced when department-wide decisions are made, and should be shared with and emphasized in communications with community partners and the public at large.

ESTABLISH VISION FOR EACH AGENCY AND THEIR ROLE FOR ACHIEVING SHARED VISION

Just as the County must adopt a shared vision across all Human Services agencies, so must each agency develop a vision for their work in this new environment, and for their role in helping the County bring its larger vision to fruition. Each agency currently includes a mission statement in the county budget document. While many of these are focused narrowly on the specific programs the agency offers, some, like DSS's *("Enhance the quality of life in Prince William County by affording individuals and families the support, protection, and safety necessary to enable them to build self-reliant lives"*), focus less on what each program provides and more on the goal for the people to whom services are provided. This mission also ties in nicely with the County's strategic plan vision of creating a community of choice. Each agency should draw on these mission statements to create a vision for a Prince William County where they are able to deliver the appropriate level of services to the appropriate population, and the larger community outcomes that would follow.

ACKNOWLEDGE CHANGE MANAGEMENT NEEDS

Change management is an approach to transitioning individuals, teams, and organizations to a desired future state. Organizational change is a structured approach in an organization for ensuring that changes are smoothly and successfully implemented to achieve lasting benefits. Enacting new shared and agency visions overnight is not possible; it requires meticulous planning and sustained effort to change an organization and the attitudes and culture fostered by staff, leadership, and even clients and external stakeholders. Some behaviors and strategies that can nurture a culture that will move the organization further along the value curve include the following:

- **Name the problems, look at data** – Agency staff and leadership should be encouraged to talk about problems that are impacting performance or the client experience. The opportunity to review available data, encourage open conversation about findings, and assigning specific names to each issue makes it possible for staff to wrap their heads around a problem and identify a solution, instead of fostering a culture of frustration or acceptance of the status quo.
- **Don't blame, fix** – Instead of looking to assign fault, staff and leadership both should focus on solutions. In agencies where policies have been developed piecemeal over time, searching for a "culprit" for every problem is more likely to lead to work avoidance than to anything that can be used constructively to solve the problem.
- **Stop talking, start listening** – When a problem arises, or a client complains about the service they received, a first instinct is often to start explaining – explaining why something happened, or why something can't or won't happen. In many cases, clients aren't upset because they didn't get what they wanted, but that they don't feel that they were heard or treated respectfully. Taking the time to listen and acknowledge an issue is important and provides the added benefit of increasing the flow of information from the client, which can sometimes lead to the development of an alternate solution.
- **Empathize but don't get pulled in** – When working with clients, staff should acknowledge the problems or concerns that arise, but not allow them to become the driver of action. For example, when asked how long it will take to process a SNAP application, a response like "Generally we process them within 1-2 weeks, although it could take as long as a month – we know this is important to you and are working as quickly as we can to complete this for you", will be better received than a factual but non-empathetic response such as "We have 30 days to process these."
- **Eliminate "Us vs. Them" mindset** – Agency leadership should actively guide staff away from creating boundaries between agencies and clients. Past experience and poor communication can make it easy for staff to write off their counterparts at other agencies as unhelpful or "part of the problem," when in fact they may not even be aware of the problem in the first place. Further, clients should not be viewed as files to be processed, or as an impediment to moving on to another task, but rather as the focus of the agency's efforts and people with whom staff should be working to find solutions.
- **Empower staff and develop the next set of leaders** – Many government agencies lack a clear line of progression for staff and do little to encourage promising junior staff members to move up the ladder. This is partly due to the longevity of many higher-level managers, but also because staff are not empowered to show that they can do more than their current role. The County should create a culture where managers are not afraid to delegate tasks to staff and where staff are provided with professional development opportunities and encouraged to progress beyond their current position. One of the ways that the County is already working to accomplish this goal is through the use of Process Action Teams (PATs). Process Action Teams are designed to bring staff together to address agency changes or recommend improvements to processes. We recommend formalizing these teams, giving them additional structure and guidance and institutionalizing them across the rest of the agencies. PATs, or whatever Leadership wishes to call them in the future, should be the driver of much of the change that happens. Instead of operating solely on an ad hoc basis, these teams should also have an ongoing purpose related to the overall change management strategy. They should be used to drive change from the ground up, to successfully implement change that is driven from the top down, and to provide valuable feedback to management about the specifics of what is happening (or should be happening) at a granular level. Some of the keys to success for these teams include: **dedicated membership, focused objectives and goals, a structured agenda, strong facilitation, data to support decision-making, buy-in from leadership, and the authority to make changes.**

Working to incorporate these behaviors and activities into the day-to-day work of each human services agency, and the collective "Human Services," will ensure that the visioning and higher-level activities taking place at all levels of county human services filters down into the thousands of small daily interactions that take place at each agency, and that are the lifeblood of an organization that is meeting the needs of its clients.

ESTABLISH SHARED MEASURES

Creating shared outcomes and assigning responsibility across agencies to achieve them will help the County and Human Services move towards its vision for better integrating and aligning services to meet the needs of clients. The County, through its most recent strategic planning process, has articulated specific outcomes for human services that will help the County become a "community of choice." Several of these outcomes are focused on specific programs or agencies, but others will require collaboration across agencies to attain any real progress. Strategic outcomes aimed at addressing the opiate abuse epidemic, decreasing the number of homeless individuals in the county, and increasing coordination between community partners will require input and resources from multiple agencies that may be working with clients impacted by these issues.

In order to establish these shared measures, county and agency leadership must come together to agree upon the specific outcomes, including those beyond the scope of the strategic planning exercise, that should drive the work of Human Services. The County has already gathered significant input from community partners during its recent listening tour, and PCG's recent client and staff surveys have shed some additional light on the priorities of those groups. This information should be used to ensure that County priorities align with those of stakeholders, as additional outreach and visioning is conducted to develop additional outcomes and measures. Some examples of shared outcomes across all of human services might include lowering rates of children living in poverty; increasing the percentage of the population able to access behavioral health services if needed; decreasing food insecurity; and decreasing the rate of substance use disorder in the County among a given age cohort. No single agency can accomplish these tasks alone, but Human Services can coordinate efforts across agencies, help determine where agencies should focus to achieve the shared outcomes, and hold agencies accountable for their expected contributions.

According to studies by the Urban Institute and The Federal Reserve Bank of San Francisco, shared measures help **reinforce partners commitment to collaboration, enable peer exchange, and advance project goals** when applied across different programs.[14]

When developing these shared measures and outcomes, it is important to keep in mind several key principles that can help lead to their successful adoption and achievement:[15]

- **Communicate clearly** – staff and leadership must know what the goals are, and why they are important.
- **Share information** – creating a dashboard or other way to measure progress will keep goals "front of mind".
- **Recognize success** – it may not be possible to provide monetary rewards for achieving goals, but calling out those who are doing great work can be a significant incentive.
- **Review and update metrics –** continuing to adjust targets based on performance and other factors will prevent people from working only to the goal.

The Commonwealth of Virginia has established some shared measures for state agencies through the strategic plans developed through the Department of Planning and Budget, but they are state-wide in nature, and some of them are output-focused rather than outcome-focused.[16] While the County may be able to use some of these measures as a starting point, examples from other jurisdictions may provide a window into additional possibilities for how to develop and publicize shared measures.

[14] http://www.whatcountsforamerica.org/portfolio/shared-measurement-advancing-evaluation-of-community-development-outcomes/
[15] These steps are outlined an Oracle white paper, "Eight Steps to Great Customer Experiences for Government Agencies," March 2012, accessed online: http://www.oracle.com/us/products/applications/8-steps-cust-exp-gov-wp-1560471.pdf.
[16] The VA Department of Planning and Budget home page links to strategic plans and performance measures for all state agencies: http://dpb.virginia.gov/sp/sp.cfm.

In Vermont, the Agency of Human Services has been tracking cross-agency outcomes for several years, and posts an online scorecard that tracks these indicators over time.[17] Several high-level outcomes are included in this scorecard, and users can adjust the level of detail to see exactly which elements make up the effort to achieve each outcome. For example, a highest-level outcome is "Vermonters are healthy." Within that outcome are indicators for each program that might have a role to play in the health of citizens, such as the Department of Health's immunization program, for which immunization targets have been set for various populations. The scorecard also includes whether targets have been met, and progress in meeting targets over time.

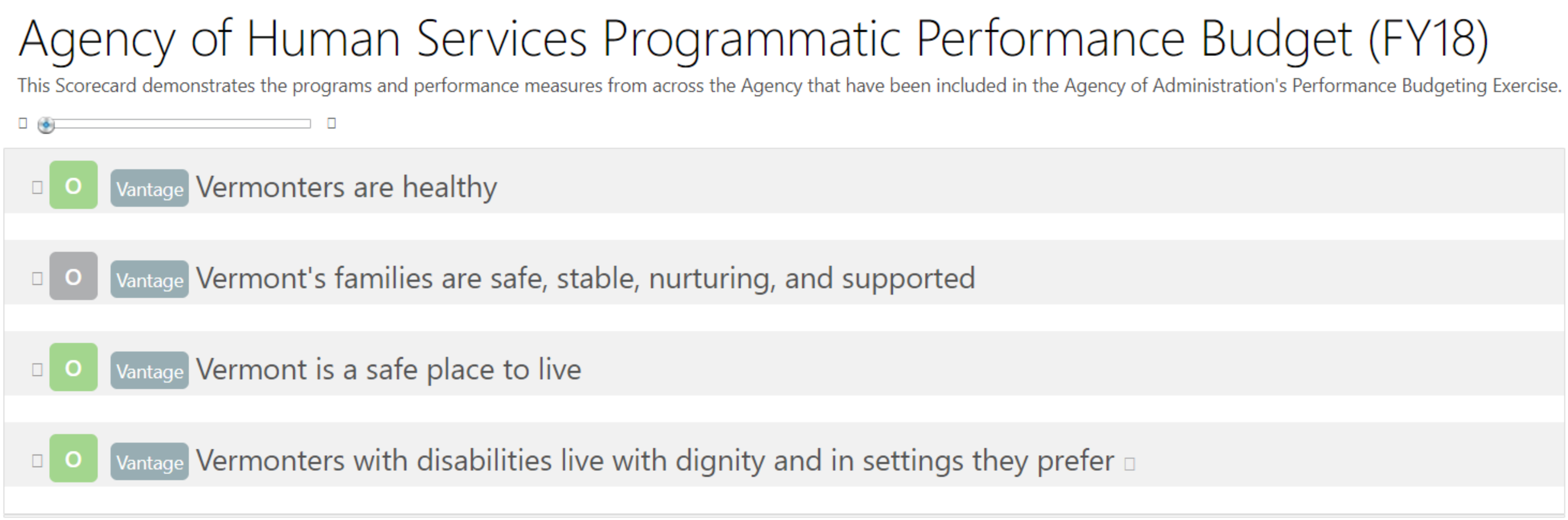


Figure 16. Example of high-level outcomes for VT Agency of Human Services scorecard.

[17] An interactive example of these scorecards can be found at: https://embed.resultsscorecard.com/Scorecard/Embed/9736.

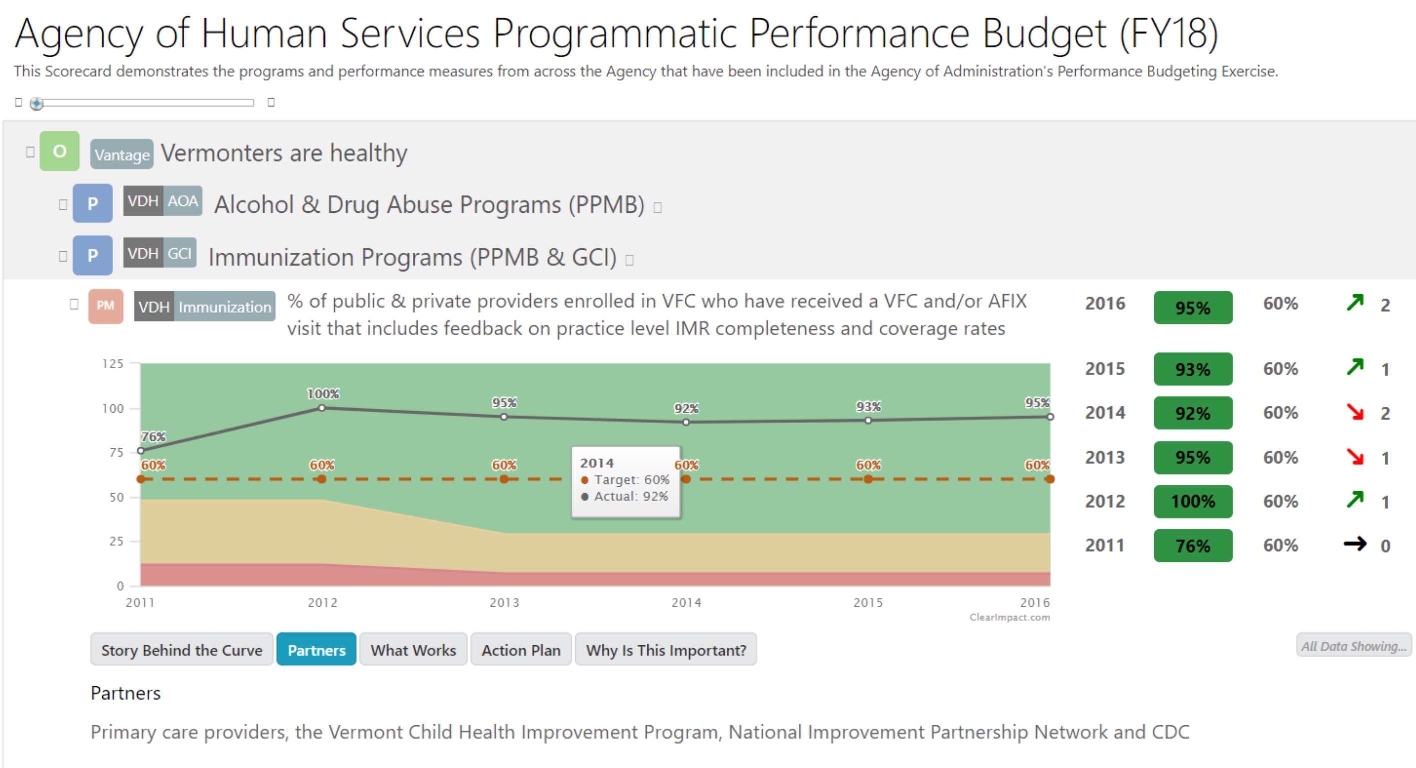


Figure 17. Example of expanded view of VT Agency of Human Services scorecard, including partner agencies and specific targets.

The Vermont scorecard example (Figures 16 (previous page) and 17 (above)) is extremely comprehensive, and setting up something similar may require interim steps as the share vision for Human Services is developed. It will be important that all agencies be clear on their responsibilities, but it may not be necessary to share all information publicly at the outset. However, sharing outcome information in a scorecard format that is accessible to agency staff, clients, stakeholders, and the general public is an important tool in developing and maintaining accountability, both at the department-wide and agency levels. Other state and county agencies across the country that have implemented public-facing dashboards or scorecards include:

- **Ventura County, CA, Human Services Agency,** which has created dashboards for all of the programs and services it provides, although they lean heavily towards outputs and demographics.[18]

[18] Examples of Ventura County dashboards can be found at: https://www.ventura.org/human-services-agency/general-relief-data/.

- **Fairfax County, VA,** which, though its “Live Healthy Fairfax” website, maintains a “Community Health Dashboard” that includes information on measures relating to county goals as well as a “Human Services Report Card” designed to provide a high-level indicator of whether the human services delivery system in the county is meeting the needs of its citizens.[19]
- **Minnesota Department of Human Services**, which provides a state and county performance and outcome data in an easily comparable format, so that counties can compare themselves to the state average and to their more direct peers. (Figure 17, below).[20]

It is important to note that there is a central, public-facing repository of community health and economic indicators at the “Be Healthy Be Happy Prince William” website. While it does include some information about public assistance programs, it is generally focused on community health information and outcomes. This site could serve as a fairly robust starting point to which the County could add additional data, shared measures, and outcome tracking across all human services programs. Although the site is funded through PWHD, a state agency, the Commonwealth and County should explore ways to avoid having to “reinvent the wheel” if a public-facing dashboard is something that the County chooses to pursue, since so much information is already collected and displayed at the current site.

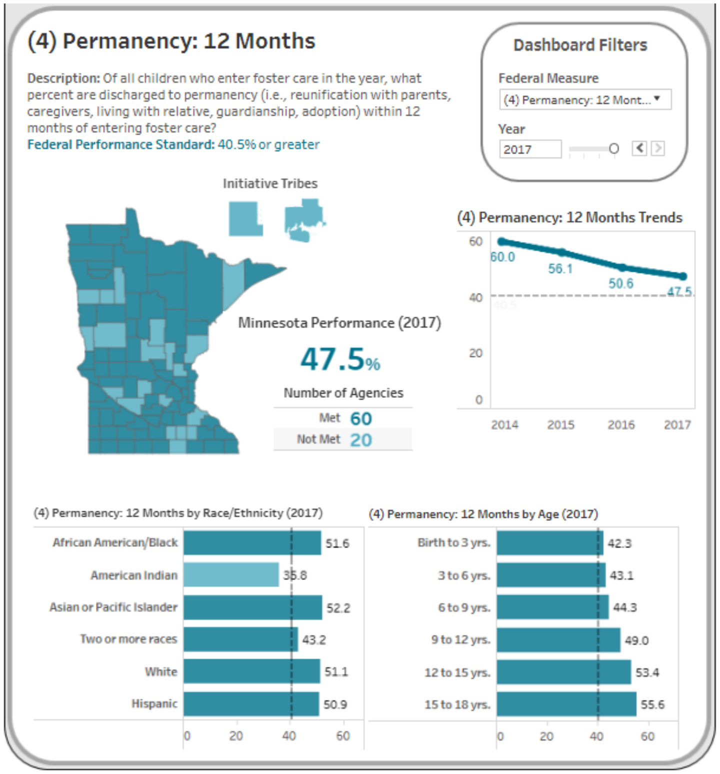


Figure 18. Example of Minnesota Department of Human Services performance scorecard.

Public-facing reports provide motivation for staff and leadership to keep investing in the necessary steps to positively influence the figures presented. It also provides tangible proof when these efforts have borne fruit. For these reports to have maximum impact, though, there must be a focus placed on them from department and agency leadership and all the way down the line. The “CitiStat” model that has been used in Baltimore, MD and elsewhere relies heavily on direct accountability from unit staff to agency or political leadership, and feature regular, frequent meetings where managers are required to explain why targets were or were not met. These reports become less useful when focus wanes and managers and staff are allowed to revert to less outcome-focused ways of carrying out their work. Human Services should plan to create a dashboard as soon as possible after it begins work, and to continue to update and expand that dashboard as integration of agency work moves forward. Once the dashboard is created, leadership will need to identify those from each agency who will be accountable for specific measures and create a process for enforcing that accountability, whether through regular meetings, written updates, or sharing successes and failures internally or externally.

[19] Fairfax County Community Health Dashboards can be accessed at: http://www.livehealthyfairfax.org/.
[20] This example and additional dashboards can be found at: https://mn.gov/dhs/partners-and-providers/news-initiatives-reports-workgroups/child-protection-foster-care-adoption/child-welfare-data-dashboard/.

Implementation Plan

Recommendations 6 and 10 were combined for implementation purposes because of the need for a clear vision for Human Services agencies to drive the development of shared measures and outcomes. The implementation plan for Recommendations 6 and 10 includes the steps necessary to Articulate Shared Vision and Establish Shared Measures, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all seven Human Services agencies will be involved in this implementation plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Human Services vision aligns with broader County needs and concerns.
- Reinforce the shared vision in the minds of staff, clients, and the public.
- Well-defined vision for each agency, with buy-in from both staff and leadership.
- Agencies will draw a direct line between their work and how it contributes to the larger goals of the County for human services.
- Continuous improvement cycle will be established.

Recommendations 6 and 10 (combined): Articulate Shared Vision and Shared Measures			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
6.1 ESTABLISH SHARED VISION	6.1.1. Create working group, under direction of Project Manager, tasked with mission of developing Human Services shared vision.	Months 1-2	✓ Development of vision has an "owner" to ensure continued progress
	6.1.2. Identify components of County strategic vision that apply to human services agencies.	Months 2-4	✓ List of ways that human services agencies can contribute to County's strategic vision
	6.1.3. Review mission and vision statements of each human services agency for alignment with strategic vision.	Months 2-4	✓ Identification of gaps between broader County vision and guiding principles of each agency
	6.1.4. Conduct outreach sessions with agency leadership and staff to gain understanding of: • Perception of current mission / vision • Gaps in practice between County vision and actual work on the ground	Months 3-6	✓ Staff are engaged in the establishment of the shared vision and feel connected to outcome of exercise
	6.1.5. Discuss goals for customer service and decide what HS aims to provide as high-level customer service. • Review PCG analysis on customer "satisfaction" • Review national research • Consider conducting an attribute wall-type exercise • Engage clients and the community to give input • Review any current customer satisfaction measures used by agencies.	Months 3-6	✓ An understanding of how clients at HS agencies define good customer service and how HS agencies will focus efforts on providing that
	6.1.6. Develop language that incorporates the information gathered in steps 6.1.1-6.1.5 above and that creates common theme that all county human services agencies can rally around.	Months 6-8	✓ County vision is applied directly to the work of human services agencies and their employees

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	6.1.7. Vet language with County Executive and BOCS.	Month 9-10	✓ Changes from CXO and BOCS are incorporated
	6.1.8. Begin utilizing shared vision language in internal and external communications for all human services agencies.	Month 9-10	✓ Link human services vision to larger County vision ✓ Communication strategy
	6.1.9. Develop a process to revisit the vision in 2-3 years.	Month 10	✓ Vision is regularly updated to maintain alignment with County priorities
6.2 ESTABLISH VISION FOR EACH AGENCY	6.2.1. Assign a cross-section of staff at each agency to subcommittee from Shared Vision working group (step 6.1.1).	Months 9-10	✓ Development of vision for each agency has an owner and agency-specific staff involvement
	6.2.2. Review core activities of each agency and create logic model to determine how each agency uses the resources at its disposal to put the shared vision of the County into action.	Months 10-12	✓ Clear understanding of the way in which the shared vision for human services is implemented (or not implemented) through the everyday activities of each agency
	6.2.3. Review current mission / vision of agency and determine whether there are gaps / disparities with shared vision.	Months 10-12	✓ Identification of gaps between human services vision and guiding principles of each agency
	6.2.4. Determine how aligning with shared vision may change service delivery / interactions with and expectations of clients.	Months 10-12	✓ Identification of changes that will be required to implement agency-specific vision (note: these will include short and long-term fixes)

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	6.2.5. Change management. • Identify change management needs to address step 6.2.4. • Identify activities that can help shift mindset of staff as necessary • If larger scale change in operations is needed, create separate set of action steps to review current operations, identify changes, and develop implementation activities	Months 13-15	✓ A clear understanding for leadership and staff of the steps necessary to bring agency activities in line with agency vision ✓ Identified organizational change management needs
	6.2.6. Develop vision language for each agency and vet with leadership group.	Months 15-17	✓ Leadership group feedback is incorporated into language
	6.2.7. Unveil agency visions to staff and clients and begin utilizing agency language in internal and external communications.	Month 18	✓ Reinforce the shared vision in the minds of staff, clients, and the public ✓ Link agency vision to larger human services and County visions
6.3 DEVELOP SHARED MEASURES AND ACCOUNTABILITY	6.3.1. Assign a cross-section of staff at each agency to subcommittee from Shared Vision working group (step 6.1.1).	Months 9-10	✓ Development of shared measures has an owner and agency-specific staff involvement
	6.3.2. Review information gathered from stakeholders prior to starting this process to inform outcomes, including community listening sessions and PCG's client and community partner surveys.	Months 10-12	✓ Measures will be informed by feedback already provided by community and staff
	6.3.3. Review agency output and outcome measures for which data is being reviewed or is available.	Months 10-12	✓ Subcommittee will be aware of the full universe of data that is available
	6.3.4. Review county strategic plan outcomes and identify which are or can be impacted by human services agencies.	Months 10-12	✓ Measures will link back to larger county strategic plan

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	6.3.5. Subcommittee develops potential shared outcomes for human services agencies and brings to leadership group to seek consensus.	Months 13-15	✓ Shared measures will have buy-in from leadership group
	6.3.6. Once consensus is reached, leadership at each agency will determine how their agency can contribute to shared outcomes and report to subcommittee.	Months 15-16	✓ Agencies will create specific measures tied to shared measures
	6.3.7. Subcommittee will develop the following: • List of consensus shared measures • Sub-measures for each agency • Proposed timeline for reviewing progress on measures • Data sources/needs for each • Proposed timeline for revisiting both shared and agency measures	Months 16-18	✓ Measures for each agency and timeline for review will be established ✓ Data needs

Dependencies	Implementation Resources
Completed creation of shared human services vision	Agency staff and leadership time
Available staff time	DoIT support to access / analyze available data
Ability of leadership group to obtain consensus on shared measures	County strategic planning team
County Strategic Planning effort and any changes to strategic vision	Project Leadership Group
BOCS / County Executive buy-in	Change management support

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Agencies may be unwilling to take on accountability for things that are not fully within their control. Mitigation Strategy:** The County will need to ensure that the measures that are assigned to each agency are, to the extent possible, not reliant on other agencies or departments to carry out, or that potential dependences inherent in a shared measure are accounted for and baked in to performance measurement.

- **It may be difficult to derive agency-specific measures from all shared measures.** In some cases, not all agencies will be able to derive a measure from a given shared measure. **Mitigation Strategy**: Consideration should be given during the creation of the shared measures of the ability of each human services agency to contribute to the desired outcomes.

- **There is potential for confusion among staff and clients if there are too many "vision statements."** It is important to clarify for staff the difference between mission, vision, and goals of the County, the Human Services agencies, and their specific agency, and the link between all of these. **Mitigation Strategy**: The County has already articulated these differences for Human Services leadership and should look to provide a similar kind of document for all staff.

- **If staff participation in development of vision is (or is perceived to be) limited, buy-in will suffer.** Staff must not feel that the shared vision is something that was "handed down from above," but rather that it reflects the work that they do, and their sense of commitment to their clients**. Mitigation Strategy**: Staff must be offered opportunities to participate in all stages of the process.

- **Creating the vision is not enough – it must be carried out.** If there is not a commitment to turning the vision into action, it will die on the vine. The momentum gained during the planning process can be tapped into to continue the push forward into implementation. **Mitigation Strategy**: County and agency communications should reinforce the new vision and focus on shared measures both internally and externally.

- **Agency visions may be overlapping or divergent.** It will be important that agencies are working together throughout the process to ensure no duplication of effort. **Mitigation Strategy**: We have proposed that a subcommittee review all shared outcomes, as well as the sub-measures for each agency, to make sure that efforts are aligned.

Recommendation 7: Adopt a Process to Consistently and Routinely Evaluate the Client Experience

Primary Goals Achieved	Primary Criteria Met
✓ Improve Client Experience	✓ Positive impact on client experience
✓ Adopt Innovative Practices	✓ Aligns with vision, mission and goals of County

The most progressive and forward-thinking organizations are able to successfully master the shift from simply delivering federally or state mandated services to engaging clients in the development and delivery of the services they need. At a fundamental level, clients want to feel empowered and be heard (and then have someone act on that input). Measuring a client's experience with services, when the goals of that experience are clearly defined, is an integral part of measuring an agency's overall performance. At present, the County's human services agencies are well-versed at measuring federal, state, accreditation, and other mandated performance outcomes, but currently have no robust, systemic way to evaluate some of the more nuanced components of the client's experience. We recommend the agency consider the following process to *renew focus on the customer experience, ensure that customers receive a consistently high level of service regardless of how they enter the agency, and ensure that customers do not have to repeatedly enter the agency to receive the same or different services.* We recommend the agencies that comprise Human Services develop a process to measure client "satisfaction" with service delivery and begin to continually measure, evaluate, and refine processes around meeting desired target(s) for performance, as established through both shared and agency-level outcome measures. To build these types of measurements into everyday practice, we recommend the County consider the following:

1. **Clearly define who are your "clients"**: Across the seven agencies the County serves a wide variety of clients from businesses to funeral homes, to child care providers to people with severe mental health issues and physical disabilities. The experience of all the clients served should be considered.

2. **Define the "product" you are providing:** It is important for the agencies to clearly understand and be able to articulate the exact

In 2013, the Child and Family Policy Institute of California under direction from the County Welfare Directors Association of California created a framework for advancing a culture of customer service in Health and Human Services at county agencies across the state.[21]

One of the key components of this study was to define, for agencies, excellent customer service, which they call "first class" service. For California, this entails **delivering services "accurately, consistently, efficiently, equitably, timely, and respectfully (with cultural and linguistic sensitivity) so that the customer's satisfaction with the process meets or exceeds his or her expectations from the point of first contact with the agency throughout the customer's experience with that agency."**

As you move forward with understanding the importance of and measuring customer service, we recommend reviewing this framework, which is composed of ten Building Blocks of Excellent Customer Service and eight Core Principles for Achieving Culture Change.

[21] https://www.cwda.org/sites/main/files/file-attachments/framework-for-advancing-culture-of-customer-service.pdf

"products" they are providing to clients. This is key so that you can clearly have a specific understanding of client, needs, wants, and steps in the process.

3. **Define "good" customer service:** Agencies also have a large investment in listening to their customers, because leadership can improve the client's experience only if they know where it falls short. The County should identify what clients would say are the key elements of their experience. As we have shared previously, we most often find the list at right to include the most important factors in creating a positive experience. More specifically, the County should consider the following

Get my application done quickly	Don't look down at me
Are easy to get in touch with	Explain things in way that is easy to understand
Don't talk down to me	Consider all of my needs
Do what they say they will do	Make it easy for me to apply for services
Return my calls	Make sure I get what I am eligible for
Don't make me wait too long	Friendly
Fair	Get things done
Let me know what is going on	Try to find ways to help me
Answer my questions	Keep me informed
Connect me to resources	

- The quantity, quality, and use of various access channels.
  - Physical facilities
  - Outside of business hours access channels
- The experience in singular interactions
  - Responsiveness
  - Customer service
  - Accuracy of information shared
  - Treatment of the client
- The assessment of a client's complete needs
  - Identification of unmet needs or service gaps
  - The referral process when an agency cannot meet all of a client's needs
- Performance against outcomes, not just outputs
- Waits
  - Phone and in-person wait times at each step of the process
  - Handoffs/transfers
  - Time waiting for services

Once the County has worked in tandem with clients to define what "satisfaction" or "good" customer service looks like, whether it's focused on fairness, communication, respect, timeliness, efficiency, resolution, or something else, Leadership can begin to appropriately measure the correct components.

4. **Understand why good customer service is important**: Often one of the most significant shifts an organization has to undertake is the mental realignment of the power dynamic that exists in the delivery of public assistance services. Too often agency staff view customers either as a barrier to meeting processing targets or completing their work, or as a source of stress produced by the their often-complex needs and challenges. When negative experiences start to add up, staff can begin to apply these views to all clients, assuming the worst of each interaction. This can lead to a spiral of poor service and poor experiences for staff and clients alike. County and agency leadership must be proactive and take steps to address this negativity before it sets in by providing reminders of the larger mission, staff's responsibility to provide a high level of service to all clients, and e*mphasizing, measuring, and rewarding good customer service*. Maintaining a focus on the reasons why good customer service is important, and its role in helping the agency attain its larger goals, can help ensure staff provide clients with a positive experience.

5. **Develop a process to obtain regular feedback from/about clients' experiences**: There are a number of ways to regularly capture client input and gain valuable insight into possible shortcomings in business processes: outbound call campaigns to previous callers, lobby surveys, or texting campaigns that could include links to online surveys. Intermittent surveying, however, while useful, helps organizations discover problems only after they have occurred. In addition, you will need to ensure that your survey is not too general or unfocused. Therefore, we also recommend capturing feedback on an immediate, episodic basis, through a warm transfer to an independent surveyor upon the conclusion of a call, or short surveys immediately following client interactions. These types of surveys give you the ability to immediately react to problems as they are occurring and let the client know you are addressing any issues. Understanding the opinions your customers may have of your operation will help guide what steps to take to improve overall service. **Seeking out and responding to the client's perspective is the result of a mentality and culture that has to be pervasive throughout the organization.**

Implementation Plan

The implementation plan for Recommendation 7 includes the steps necessary to Adopt a Process to Consistently and Routinely Evaluate the Client Experience, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all Human Services agencies and DoIT will be involved in this implementation plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Regular and consistent feedback from clients on their experiences accessing human services.
- A clear definition of the expectations for the client experience.
- Data that can be used to inform continuous improvement efforts by Human Services agencies.
- A clear understanding of data that is currently being collected, and the gaps within that data that must be addressed.

Recommendation 7: Adopt a Process to Consistently and Routinely Evaluate the Client Experience			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
7.1 INVENTORY CURRENT CLIENT EVALUATION ACTIVITIES	7.1.1. Convene Client Experience working group to collect and review all currently used measures of client satisfaction and customer services from HS agencies and county.	Months 1-3	✓ Reduce duplicative surveys or tools and streamline process to evaluate client experiences
	7.1.2. Evaluate which surveys or tools are required by state or federal partners, which are redundant, and which could be eliminated or improved.		
7.2 CLEARLY DEFINE WHO ARE YOUR "CLIENTS"	7.2.1. Develop a list of everyone each HS agency considers a "client" using an online survey tool.	Month 3	✓ Comprehensive list of HS "clients"
	7.2.2. Categorize the client list into taxonomies (ex. consumers, partner agencies, grantees, public, business, etc.) – it may be helpful to align this with other current survey processes.	Month 3	✓ Understand the types of clients served by HS agencies
7.3 DEFINE THE "PRODUCT" YOU ARE PROVIDING AND "GOOD" CUSTOMER SERVICE	7.3.1. Engage workgroup to define "products" and "good" customer service.	Months 4-8	✓ Establish a clear leader and identify who should be part of this discussion
	7.3.2. Collect a list of all "products" that are developed and provided to clients including goods and services from each HS agency using an online survey tool.	Months 4-5	✓ Comprehensive list of all HS "products"
	7.3.3. Develop inventory of all characteristics of good customer service (that align with the definition created in 7.3.1) and cross-reference elements defined in PCG Recommendations Report.	Months 4-5	✓ Comprehensive list of all characteristics of "good" customer service
	7.3.4. Categorize the products into taxonomies (ex. Financial benefits, housing, treatment, case management, training, etc.).	Months 6-7	✓ Understand the types of products provided by HS agencies
	7.3.5. Review models from other public agencies such as the California Welfare Directors Association Framework for Advancing Customer Service for ideas on how to define good customer service.	Months 6-7	✓ Build a framework for customer service based on best practices and those characteristics

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	7.3.6. Engage HS clients to understand the attributes of customer services that they value highly. Potential methods include: • Telephone, mail, lobby survey • Use of social media or website • Focus groups • Post on bulletin board for public commentary in service centers	Month 8	✓ Incorporate client perspectives on customer service into evaluation process
	7.3.7. Develop list of essential characteristics of good customer service that can be applied across HS agencies.	Month 9	✓ Develop a universal, mutually agreed upon list that describes good customer service
7.4 DEVELOP A PROCESS TO OBTAIN REGULAR FEEDBACK FROM/ABOUT CLIENTS' EXPERIENCES	7.4.1. Workgroup determines which measurements of good customer services should be used to evaluate the client experience across all HS agencies.	Months 9-10	✓ A plan for how HS agencies will measure client experience
	7.4.2. Selects method(s) for evaluating client experience (ex. lobby surveys, text campaigns, online surveys, phone call surveys, social media campaigns).	Month 11	✓ A method(s) that each HS agencies can implement consistently and with fidelity
	7.4.3. Develop questions/measures for each method selected.	Months 12-13	✓ Consistent measurement of client experience within/across HS agencies
	7.4.4. Workgroup (or designated agency leads) develop process to implement surveys in each HS agency.	Months 14-15	✓ A process to implement each method selected
	7.4.5. HS agencies implement method(s) to collect feedback about client experience.	Months 16-17	✓ Information is learned about the client experience
	7.4.6. HS agency leaders collect feedback from client experiences, share results across HS agencies, and use information to inform decisions and continuous quality improvement.	Month 18 - ongoing	✓ Information is used to support Recommendation 11: *Establish Shared Measures Across Agencies and Accountability for Agency Outcomes*

Dependencies	Implementation Resources
Requires a well-defined and functioning workgroup with strong leadership	Staff time
Requires all HS agency leaders to support unified mission for emphasizing, measuring, and rewarding good customer service	Meeting space
Requires PWC to develop a vision for HS agencies and integrate mission of good customer service into the vision	Currently used client satisfaction surveys
	Methods to obtain client experience (phone surveys, texting software, online surveys, paper lobby surveys)

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Separate agency definitions or measurements of "good customer service" could make it difficult to evaluate how well the County is performing as a whole or draw comparisons.** The working group will need to be on the lookout for areas where different agencies are creating measurements that are substantially different from each other, or that are tied to an agency-specific issue. **Mitigation Strategy**: In order to create a Human Services-wide comparison, the working group should focus on creating several measures or survey questions that are applicable across all agencies, even if additional agency-specific questions are included in the same survey.

- **Agencies may collect information on the client experience but not utilize that information to inform future decisions.** Failure to incorporate a client experience information into agency decision-making processes will undermine these efforts, from the perspectives of both clients, who will feel that they are being ignored, and staff, who will feel as if they are being required to take extra steps to collect this information for no reason. **Mitigation Strategy:** Agencies must be clear about their intentions for the information they are collecting and provide an update to clients, if possible, on survey outcomes.

- **It is difficult to measure and impact the qualitative experience of clients.** In many cases, evaluations tend to focus on outputs that are more easily measured. **Mitigation Strategy:** The County may need to use multiple methods to effectively collect client experience information, and will need to account for the fact that some respondents will be dissatisfied no matter how positive their customer service experience, because of program guidelines around eligibility for services.

- **Agencies may want to default back to the measures they typically collect for other reports and not utilize a shared county-wide definition of good customer service.** Particularly for the agencies who face bigger customer experience challenges, shared measures may portray them in an unflattering light, compared to other agencies, and they may wish to return to using their own metrics for determining or measuring customer satisfaction. **Mitigation Strategy:** Develop regular opportunities to evaluate the measures themselves, and provide agencies with input into the design of survey questions. It may also be necessary to include agency-specific questions in addition to more general customer-experience related questions.

Recommendation 8: Implement Workflow Efficiencies

Primary Goals Achieved

- ✓ Realize Operational Efficiencies
- ✓ Adopt Innovative Practices

Primary Criteria Met

- ✓ Includes immediate and long-term changes
- ✓ Creates value for both agencies and clients

In order to have the maximum impact on the client's experience when receiving services, we recommend agencies restructure some of their existing workflows and consider future process enhancements to improve the flow of services to the client. These types of process improvement efforts can result in the identification of (and improvement of) inefficiencies and work interruptions; reduced red tape; decreases in wait and processing times; improvements to the quality and value of products or services; and increased flexibility. We also propose that the County develop the internal capacity to routinely and consistently map current and new processes to ensure maximum efficiency (and effectiveness) for both staff and clients.

Although the County has undertaken some continuous improvement work in the past (including some initiatives in progress at this time at various agencies), it does not appear to have carried out consistently, nor has the follow through to actually identify and implement improvements always been possible. It is anticipated that organizational culture changes will be initiated in the near future that will impact county agencies beyond Human Services. If possible, Human Services agencies should become "early adopters" of any new countywide continuous quality improvement system that is implemented, which would allow agencies to begin this important work without needing to create or set up a system specific to Human Services.

RESTRUCTURE EXISTING WORKFLOWS

Implement changes at DSS reception area(s): According to staff and backed up by our observations, a majority of clients who come into the DSS lobbies at Ferlazzo and Sudley North come in to drop off paperwork, ask a question, or update their cases. Therefore, we are recommending the following changes to increase efficiency, improve flow in the building, and make available additional staff time.[22]

- DSS should implement a **Workload Management Solution, or WMS** (see more detail in the next section, below) that allows staff to more efficiently move people around the building and more effectively locate someone to assist a client. It also allows staff to sign in/out of the building, identify if they are busy with a client, on a home visit, or on personal leave. In addition, a WMS would keep the reception staff from having to locate a worker — though it would be easier if they needed to — and would increase accountability and transparency regarding work.

[22] Note: the recommendations in this section are based on the current state, and may not apply if lobby integration or interconnectedness effort (such as those described in Recommendation 4) are undertaken.

Additional considerations at DSS: Below are some additional examples of impactful business process changes for consideration going forward that have been successfully implemented in other states or counties:

From 2010-2015, six states participated in a multi-million-dollar grant supported by The Ford Foundation, The Open Society Foundation, The Annie E. Casey Foundation, The Kresge Foundation, and J.P. Morgan Chase. These states (as well as other states and counties who were not part of the grant but used similar innovative techniques) used a combination of approaches to streamline the delivery of public assistance benefits, for both staff and clients. Many of these approaches were successful and we are recommending DSS consider implementing one (or all) of them.

1. **One-Touch Processing**: Several counties and states (including Fresno County, CA and the Massachusetts Department of Transitional Assistance) changed the business design of local offices by shifting the way work is allocated, limiting the number of times a worker touches a case, and focusing on one-touch case processing.
2. **Same-Day Processing**: A second approach was to change office culture by putting greater emphasis on timeliness and customer service in local offices; many offices set goals to deliver benefits much faster than required under federal law, promoting a concept many call "same day processing." Same day processing is the concept that as DSS staff are able, they should strive to process cases on the same day that the client comes into the building. Policy allows (and state program staff encourage) for a case to be processed as soon as all required verifications are received. There is no benefit to holding onto a case when information is in or can be obtained for or from the client; it only serves to transfer caseworker effort and time from more meaningful activities. **The state of Idaho currently provides same-day processing service to 70 percent of its SNAP clients, while Caldwell County (NC) and Warren County (NC) process 95 percent of applications for SNAP same-day.**
3. **Reducing Churn**: Many states are working to reduce churn, which happens when someone who receives public assistance benefits falls off the program and re-enters within 90 days or fewer. Some level of churn will always occur for these programs, but it presents a problem when benefits are disrupted for eligible families. In addition to agencies incurring the time and administrative expense of closing and reopening the case, eligible families who lose federal benefits have their heath and food security placed at risk. There are ways (such as through the alignment of renewals, ex-parte reviews where possible, and using and sharing data between programs) to reduce the churn of people from federal benefits.
4. **Expanding electronic verification of client information**: Within the bounds of policy, states and counties have expanded efforts to electronically verify all information that they can (thorough access to vital records, employer records, and state systems that can more easily verify program components). States are also developing directives for staff to more proactive with verifications. This includes activities such as immediately calling employers to verify wages and status or calling landlords to confirm rent amounts. In addition, states have implemented changes to **"improve cross-program enrollment, share information, cut out redundant verifications, and reduce the overall number of client interactions for families eligible for multiple benefits."**

Source: https://www.urban.org/sites/default/files/publication/85851/improving-the-efficiency-of-benefit_delivery_report_2.pdf.

Implement changes at CS reception area(s).

CS is in the process of a major overhaul, moving to Same Day Access per state requirements, and is working with an external consultant to develop new processes. This presents an opportunity not only to receive funding for additional positions to manage the anticipated increased demand in services, but also to examine current processes and workflows. CS should consider operational changes that will minimize client wait times and utilize technology to communicate about client progress through the intake and appointment process. Whenever possible the current electronic health record system used by

CS should operate as a workflow management system to alert staff (reception, intake, clinical, finance, and scheduling) that a client has completed one process and is ready and waiting for the next step. The organization of clients as they move through CS offices should also be streamlined as much as possible so that clients do not have to bounce between the lobby and other waiting areas, while balancing the need for security and confidentiality.

Develop a more robust scheduling process at PWHD.

In a public health care setting the scheduling of services and flow of patient traffic through a building is a complex balancing act that manages patient needs with clinical acuity and includes such complex additional variables as organizational needs, budgets, and performance requirements. During the course of this engagement, leadership and staff at PWHD have made improvements to enhance the ability of clients to be seen by a clinician more quickly. In conjunction with continued public outreach about these changes, we recommend that the Department continue to refine their scheduling processes, and in consultation with leadership, focus on improvements that will:

- Ensure federal timeframes around scheduling are met
- Include the opportunity to further triage and correctly “slot” clients
- Further assess the need for clinician vs nursing appointments
- Improve the number of patients per clinician seen per day (research and best practices put this at double the current County numbers of 7 per clinician per day, which, when combined with a no-show rate of over 20 percent, means fewer than 6 per clinician per day)

We recommend using a process (Process Action Teams — PATs — are one way) to engage staff to develop ideas that would achieve (or continue to improve) the goals listed above. Some considerations are listed and detailed below.

- Further analysis of no-shows with the potential to adjust scheduling for more timely appointments or double-booking
- Defined training needs and additional training
- Dedicated phone scheduling staff (to be considered as a standalone queue within the Call Center) that can work across all offices.
- Improved scheduling processes to consider different appointment lengths
- The use of (even basic-level) predictive analytics and modeling tools to understand cyclical fluctuations in demand that could be addressed through staffing, hours, and other options to more quickly address patient needs.

In addition, staff at PWHD should ensure they are connecting clients who are interested in applying or who might be eligible for Medicaid with the appropriate resources and encouraging them to apply. This can be done through a stronger connection with or presence of DSS staff.

INVEST IN A CULTURE OF CONTINUOUS IMPROVEMENT

Another factor that can contribute to high caseloads and strains on staff is when processes and programs are not efficiently moving clients through services. While we have provided recommendations above to improve some front-end business processes that contribute to these inefficiencies,

The Arizona Department of Child Safety has seen improvement in workflow efficiency using their “lean” management system based on standardizing processes, training staff in efficient workflow and creating measures to gauge staff adherence to the new way of working. The method requires staff to continuously report “standard work”, which encourages individual consideration of what comprises day-to-day activities. From this recognition point, benchmarks can be determined and measured. These elements help answer questions about workload and efficiency, and whether or not the metrics are moving in the right direction.

While early in the implementation of this approach, there are clear benefits already evident in improved program outcomes.

here we also recommend that each agency develop the capacity to ensure they are implementing the most effective and efficient front-end *and* back-end business processes to meet client needs. If the County wants to truly make an impact into how services are delivered, they should invest and fully commit to developing a lean culture of continuous process improvement (see example from Arizona, above right).

One of the keys to developing a culture of continuous improvement is to clearly define and be constantly evaluating business processes. This can happen through tools such as Lean, Six Sigma, 5S, Kaizen, Value Stream Mapping, or another means that the County feels would work best for them. Having one or more staff trained in any one of those products, or another similar proven process improvement methodology, will provide the capacity to implement an effective workflow and process mapping "system." Human services agencies will no longer feel confused about inefficiencies in their business processes and whether or not they're maximizing staff effort. These mapping processes provide both text and graphical methods of defining each process an agency undertakes, associating each action with a technology application or manual, human process. These will highlight inefficiencies in the way current work is being completed allowing Human Service agencies to continually improve processes from within. Developing the internal capacity for business process redesign will help reduce processing time, eliminate waste, and improve the quality and value of services.

In addition, applying a Lean model to processes in health care settings has proven incredibly effective when techniques are used to streamlines processes, reduce delays, and eliminate waste, while decreasing patient wait time and increasing clinical efficiency.

INVEST IN A WORKFLOW MANAGEMENT SYSTEM

For the agencies that have high in-person traffic (mainly PWHD, DSS, and CS) we recommend working together to find and implement a shared workflow management system (WMS) that can improve the tracking and movement of both people and paper (should you choose to use it for the latter) through agencies. This type of system will alleviate some of the current inefficiencies around having to track down workers, placing unanswered calls or Skype message to staff, "losing" clients in as they move throughout the building, having wait times that aren't measured, and not having streamlined ways to let staff know that clients are waiting on them. In addition, it can automate routine tasks. At present, agencies have only manual and time-consuming ways of tracking down workers; in addition, for clients at each of these agencies there can be multiple steps in the process and different staff to see when they come into the building.

Larimer County (CO) has a workflow management system that has allowed them to improve processes by examining client wait and worker service times. Their system provides managers with real-time data about work queues and time spent on various tasks.

San Joaquin County Human Services Agency (CA) sees over 2,000 people a day through their lobbies. Since implementing a workflow management system, the agency has greatly reduced lobby wait time, increased same-day appointments, and reduced client frustration.

A WMS will assist the County with the series of activities that are necessary to complete a task and provides an infrastructure for the set-up, performance and monitoring of a defined sequence of workflow tasks. A high-quality workflow management product can encourage:

Organizational Change: A good WMS can develop rules, actions, and roles into agency processes therefore requiring less human involvement to manage paper, people, and business processes. In addition, communication becomes more streamlined and efficient through notification and standardized tasks and steps.

More Efficient Business Processes: In addition, a WMS can further your understanding of inefficiencies within your current business processes and help identify ways to improve them. The activity of detailing out current workflows (as described in the section above, both for as-is and to-be) should be done before workflow architecture is laid to avoid embedding inefficient or ineffective practices. Using a WMS requires that the agency understand the task, the order of its steps, who is responsible for completing each step, and what happens to the output of each step in the task. Below are some considerations for a solution:

1. **Simple Forms Design:** The form designer should be intuitive and shouldn't require a consultant to walk you through it.
2. **Routing and Distribution system:** This allows sharing of tasks among a team and the movement of tasks from one staff member to another.
3. **Role based Access Control:** There may be some sensitive information in the workflow and a WMS must allow customization for what each individual user can see and edit.
4. **Flexible workflow patterns:** Ideally, a WMS should define and guide processes, but not put constraints on them. It must be flexible enough to be able to design workflows in a variety of ways.
5. **Easy-to-interpret task status:** WMS must allow participants to keep a check on task status at all times. Automated email or SMS alerts that tell the next person in the sequence to be ready for the task is an important feature. Time stamps for each step help target improvement efforts.
6. **Efficient reporting features:** Reporting features, particularly when coupled with strong workflow analytics, are among the most valuable features workflow management software can have.
7. **Cloud-Based Technology:** Users of WMS should be able give approvals and access data and reports from any location at any time.

While we strongly suggest that the County should investigate whether a "Platform as a Service" model (Recommendation 11) that would include the ability to add a workflow widget (assuming it is open-source) could be an appropriate solution, we recognize that the County has to be mindful of taxpayer resources. At a minimum, the County should use functionality already available to them within each agency, through Harmony or other products. Either way it is imperative that the system is used across all agencies if the County moves to integration at the front desk or through processes; it can **smooth and automate the flow of client traffic, referrals, and paperwork**.

Implementation Plan

The implementation plan for Recommendation 8 includes the steps necessary to Implement Workflow Efficiencies, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Please note that the first task in this plan in previous versions, *8.1, Implement Workflow Efficiencies – Eliminate Non-Value Add Steps from the Current Process,* was moved prior to the implementation plan for Recommendation 4, *Improve Interconnectedness at Entry Points*, where it would need to be undertaken to benefit the development of interconnectedness efforts. The remaining steps have been renumbered to align with the language in Recommendation 8.

Agencies Involved

It is anticipated that all Human Services agencies will be involved in this implementation plan. In addition, county DoIT staff will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Improved processes that reduce complexity for clients and staff.
- Technology that leads to more efficient workflow management and quicker processing times.
- Integration of current technology and tools into workflow management.
- Less staff time devoted to processing, leading to an enhanced customer experience.

Recommendation 8: Implement Workflow Efficiencies			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
8.1 RESTRUCTURE EXISTING WORKFLOWS	8.1.1. Convene Client Experience working group with members from each agency.	Month 1	✓ Teams of experts from each agency.
	8.1.2. Map[23] current process flows where there are opportunities for improvement/efficiency (for example, front desk at CS and patient flow through the intake process, scheduling at PH, and DSS reception areas). The team should be: • Looking at the process from a customer's point of view • Eliminating non-value-add steps and tasks • Thinking of low-cost solutions first (i.e. changing the process before acquiring a new technology) • Simplifying the process by asking why each step exists, and eliminating non-value-add steps • Making sure to do each task only once • Implementing visual systems • Keeping track of work that's done because someone didn't do it right the first time • Standardizing work • Setting specific, aggressive, and appropriate goals based on baseline data	Months 1-3	✓ Processes to be reviewed for improvement identified and mapped
	8.1.3. Gather any data needed as part of the process. The team should be asking themselves questions about processes that are undertaken most frequently, that take the longest to complete, and that have multiple "hand-offs."	Months 1-3	✓ Data as needed to inform mapping

[23] One way to accomplish this "mapping" process is through a technique called value stream mapping, or VSM. VSM is a facilitated Lean method used for capturing both the workflow and the movement of information supporting a process. The focus is on identifying how effectively the process delivers value to the customer. Fundamental to the value stream mapping method is that the value creators, i.e. County staff, with their understanding and unique perspective, create the maps.

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	8.1.4. Review each map to confirm inputs, input requirements, suppliers, customers, outputs, steps, and time at each step.	Months 1-3	✓ Draft, detailed maps for each identified process
	8.1.5. Make sure to thoroughly validate with the staff who perform these tasks every day. Finalize maps.	Month 4	✓ Finalized maps
	8.1.6. Discuss, as a team and with others who might have valuable input, opportunities to streamline processes, reduce redundancy, automate, consolidate steps or add value for customers.	Months 5-6	✓ Opportunities for improvement identified
	8.1.7. Discuss vision of future process (identify impacts for staff and clients).	Months 5-6	✓ Future state of processes identified
	8.1.8. Update process maps to incorporate new changes.	Months 6-7	✓ Maps reflecting updated processes
	8.1.9. Develop process to implement changes including procurement of additional technology, addition or movement of staff, facilities' needs, or other changes identified in the future state processes.	Months 7-10	✓ Plan to implement process changes developed.
8.2 INVEST IN A WORKFLOW MANAGEMENT SYSTEM (WMS)	8.2.1. Convene IT working group, led by PM, ensuring membership includes any additional individuals from the agencies who have knowledge of current processes.	Month 1	✓ Formation of a dedicated project team with relevant technical expertise. ✓ Current state maps, with "wastes" identified
	8.2.2. Analyze and map current processes, identifying non-value-add or inefficient processes (note: some process mapping work from step 8.2.2 may be used here as well).	Months 2-4	
	8.2.3. Complete a feasibility study and requirements gathering, including collecting business requirements to inform system needs and an RFP. In addition, unless there is single agency ownership of the system, conduct a cost allocation assessment.	Months 4-8	✓ Technical business requirements mapped ✓ Technical needs and goals clearly articulated

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	8.2.4. Complete business process analysis, future-state business process mapping, and draft a technical roadmap for the system procurement.	Months 9-12	✓ As-is and future-state process mapping completed ✓ Business process needs and goals clearly articulated ✓ RFP drafted
	8.2.5. If purchasing an IT solution, begin procurement process by taking the following steps: 8.2.5.a. Seek Technical Review Board approval 8.2.5.b. Seek approval from IT Advisory Committee 8.2.5.c. Secure project on TIP for upcoming FY 8.2.5.d. Seek TIP approval 8.2.5.e. Develop and publish RFP 8.2.5.f. View products and award contract	Months 12-15	✓ System and implementation services are competitively procured to meet RFP requirements
	8.2.6. Outline customization needs with vendor.	Months 16-20	✓ Customization needs defined
	8.2.7. Develop implementation plan.	Months 16-20	✓ Implementation Roadmap completed to document definitive timelines and activities to prepare for system go-live, change management, training, and ongoing activities
	8.2.8. Develop reporting structure and list of desired reports/report functionality.	Months 20-22	✓ Reporting needs defined
	8.2.9. Develop SOPs for staff in alignment with updated workflows (developed in 8.1.8.).	Months 20-22	✓ Standard operating procedures and workflows for staff

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	8.2.10. Define users and roles.	Months 20-22	✓ List of users and their roles
	8.2.11. Update any needs for existing hardware and operating systems to support WMS.	Months 20-24	✓ Hardware and software that supports implementation
	8.2.12. Develop integration plan for other systems (such as Harmony, etc.).	Months 20-24	✓ Integration plan, specifications
	8.2.13. Conduct training and change management activities.	Months 22-24	✓ Training for all staff involved on SOPs ✓ Training for all supervisors on reporting and data tracking ✓ Change management and change readiness for staff and supervisors

Dependencies	Implementation Resources
Identify capital to see project through completion	Staff time, to conduct analysis and implement new system
Additional staff responsibilities are dependent on time made available by reducing work load with improved workflows and processes	Cost of procurement

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Process mapping and improvement can be time-intensive.** Accurately mapping multiple processes can take a significant amount of time, especially if it is being conducted in addition to the regular duties of agency staff. **Mitigation Strategy**: The project manager may wish to rotate working group members through process mapping work to ensure there is adequate capacity to conduct this work.

- **Communication is crucial for a successful IT procurement and implementation.** Particularly in this case, failure to communicate with all relevant parties could result in the procurement of a WMS that does not meet the needs of a given agency or process, and could become yet another system that folks have to deal with rather than a solution. **Mitigation Strategy**: From requirements gathering, or product testing, to training and implementation planning, communications across all stakeholders must be at the forefront of this process, to ensure compatibility with existing system, updated processes, and agency needs.

Recommendation 9: Designate or Hire Full-time Temporary Project Manager to Guide Implementation Activities

Primary Goals Achieved	Primary Criteria Met
✓ Increase Integration and/or Alignment of Services	✓ Practical and realistic to implement
✓ Realize Operational Efficiencies	✓ Impacts multiple agencies
	✓ Cost-effective

Presently, cross-agency collaboration is generally addressed by specific agency leadership, as well as the DCXO. The scope of the effort that will be required to align agency efforts, build partnerships, and develop and communicate shared strategic visioning and outcomes will require a dedicated Project Manager, both to provide capacity to take on these tasks, and to allow agency leadership to continue to focus on day-to-day tasks while managing this transition within their own agencies. As part of this project, PCG will develop an implementation plan and an initial roadmap for implementation activities. The County should designate or hire a full-time Project Manager to operationalize that plan and move the County forward. It is anticipated that this role will require full-time focus for at least 18 to 24 months.

The Project Manager will be responsible for coordinating implementation tasks across agencies, for developing timelines around project components, and for creating and managing the work groups that are necessary to facilitate these activities within and across agencies. The Project Manager will work closely with county leadership to lead, conduct, and monitor implementation activities, project milestones, and project deliverables. Specific duties of the project manager will include but not be limited to:

- Managing day to day implementation activities;
- Overseeing the Implementation Working Groups, who will help facilitate activities across agencies;
- Establishing project management protocols, including a risk management plan, budget management approach, communication plan, and stakeholder engagement plan;
- Ensuring that the implementation is on schedule to hit major milestones and deliverable dates;
- Working with county and agency leadership to coordinate necessary resources to ensure a successful implementation; and
- Supporting contingency planning.

The County should not simply assign the project management role to someone with additional leadership or program duties, as they will be unable to provide the level of guidance and leadership required to keep the transition on track without shortchanging their permanent role. Likewise, relying on each agency director to handle a piece of the transition work is not likely to be successful, as without a clear "owner," transition work will be deprioritized for the sake of other agency concerns. Further, the Project Manager must be positioned at a level within the structure of Human Services that provides sufficient influence with county and agency leadership to allow for oversight of each of these project management activities.

Designating a full-time temporary Project Manager sends a message to agency leadership and staff that the County is serious about making changes, and that there is a real commitment of time, energy, and resources to setting and achieving this vision. The County will need to determine whether an internal or external candidate is the best fit for this role. A Project Manager with experience at one or more human services agencies can provide advantages, such as programmatic knowledge and pre-existing relationships. However, someone who hasn't previously been embedded within a single agency may be able to bring a new perspective to implementation efforts, while also avoiding any appearance of "taking sides" with a particular agency due to past experience.

Implementation Plan

The implementation plan for Recommendation 9 includes the steps necessary to Designate or Hire Full-time Temporary Project Manager to Guide Implementation Activities, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all county Human Services agencies will be involved in this implementation plan. In addition, county Human Resources staff will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- The successful implementation of a new business model and the improvements to service delivery and efficiencies to be gained from it.

Recommendation 9: Designate or hire full-time temporary project manager to guide implementation activities			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
9.1 INITIATE HIRING PROCESS	9.1.1. Assign a member of agency or county leadership to manage the hiring (hiring manger) of this position.	Month 1	✓ Designated lead to manage the hiring/designation process
	9.1.2. Simultaneously with the above, identify oversight agency and supervisor for this position.	Month 1	✓ Designated supervisor (acknowledging the need to view projects from a HS-wide perspective and coordinate *across* agencies)
	9.1.3. The hiring manager will review and draw upon examples across sectors to create a job description that will guide the hiring process. This job description will include such fundamentals as: • Experience in project management and/or project management certification (ex, PMP) • Knowledge of Human Services in VA • Strong skills in facilitation and consensus-building • Strong work ethic, ability to meet tight deadlines, and excellent organizational skills	Month 2	✓ Create a quality and encompassing job description
	9.1.4. Advertise the job listing. 9.1.4.a. As a first option, review current temp agency contract to determine if the position falls within what is included in that contract. If so, reach out to existing temp agency partner to discuss the job opening. If not: 9.1.4.b. Announce job opening on the County Website and others such as Indeed. 9.1.4.c. List job opening until position if filled.	Month 3	✓ Advertised posting

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
9.2 REVIEW APPLICATIONS AND CONDUCT INTERVIEWS	9.2.1. Begin review period of the applicants. 9.2.1.a. Create a preferred list of the top 5-10 applicants and start interview process.	Month 4	✓ Short list of potential hires to review
	9.2.2. Interview potential candidates from preferred list. 9.2.2.a. Create criteria for evaluating interviews that can be used throughout the hiring process. 9.2.2.b. Create an interview panel and plan, designate dates, places, and questions. 9.2.2.c. Check references of candidates. 9.2.2.d. Create Transition Plan in the event that existing staff member is selected for the position - they will be required to leave their existing duties to become the full-time project manager.	Months 4-5	✓ Preferred candidate ✓ Transition plan if hire is internal
9.3 HIRE/APPOINT PROJECT MANAGER TO OVERSEE IMPLEMENTATION EFFORTS	9.3.1. Offer employment to desired candidate and (as needed) begin the process of obtaining, background checks, drug testing, and other necessary actions.	Month 5	✓ Offer of employment ✓ Hiring timeline
	9.3.2. Ensure PM is provided with the implementation plan and they have all necessary resources, data, and contacts to complete a successful transition into the new position.	Month 6	✓ Workplan (derived from Implementation Plan)

Dependencies	Implementation Resources
Availability of quality candidates	Funding
Funding for the temporary position	Time (including supervision)

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Needed resources are unable to be procured.** Once the County begins undertaking the changes described herein, staffing resources will be required. If this position and the expenditures for it are not approved, there are few avenues available for the County to achieve the same results and have a positive impact on efficiency and customer service. The Project Manager position is vital to the success of the overall project. **Mitigation Strategies**: The County can designate an existing staff member to handle the implementation activities. This will take time away from their day-to-day work responsibilities that will need to be picked up by a team member.
- **Authority is not given to the Project Manager to "own" and manage all activities associated with this project**. If Project sponsors and agency leadership isn't able to turn over day-to-day and meeting management to the PM, then serious risks are posed to the success of the project. **Mitigation Strategies**: Leadership and the PM develop a communication and decision-making document as a part of the PM's workplan.

Recommendation 11: Implement System Architecture to Collect and Use Data for Strategic Decision-Making

Primary Goals Achieved

- ✓ **Improve Client Experience**
- ✓ **Adopt Innovative Practices**

Primary Criteria Met

- ✓ **Utilizes creative and innovative solutions**
- ✓ **Creates value for both agencies and clients**

The agencies that provide human services to county residents have shown a willingness to come to the table and work together to solve problems, but they are missing a crucial element: data. Certainly, large amounts of data are being collected by each agency, but there are few opportunities to use the information in its current state for strategic decision-making. This lack of information has prevented the County from identifying shared clients or populations that are served by multiple agencies for what may be similar or interrelated issues, and from developing strategies to address the needs of those clients in a coordinated fashion.

Technology has transformed the way we do business, navigate various aspects of our lives, and has set a new standard of expectations for timeliness, productivity, and ease of access. Every answer is just a touch or a click away. Technology also provides the County with the potential to harness the volume of data it collects through intake forms, case files, and feedback forms. Just as PCG collected survey data to answer the County's question, "*How do we improve client access and our clients' experience?*", the County can harness the data it collects to readily answer other targeted questions, such as:

- *How do we improve programmatic outcomes?*
- *How do we reduce costs?*
- *Where are our problem areas?*
- *What does the population we serve look like and how is it changing?*

Improving the capacity to capture, share, and use data will also improve productivity by reducing the time that staff spend gathering or tracking down information that has already been shared with another agency, increasing the number of clients that can be served each day and improving the quality of those interactions.

DEVELOP USE CASE SCENARIOS

As noted elsewhere, the county is already working with 48 separate IT systems across its human services agencies; there is little appetite for the additional data entry that would be required if an additional system were to be layered across all agencies. Some jurisdictions have developed use case scenarios – a way of explaining the relationship between an actor and a system that can be used to develop a technology solution – for a type of data sharing and care collaboration that could easily apply to the County. As an example, the Massachusetts eHealth Institute, a state agency, developed use cases for a number of health care providers, including substance use treatment centers, behavioral health providers, and primary care physicians, with the goal of more tightly coordinating care for high-risk patients who have multiple touchpoints in the health care system. Similar to the "no wrong door" approach sought by the county, a stated goal of this health information exchange is that "no matter where the patient presents, trading partners [i.e., health care professionals with access to shared data] can easily refer the patient to be treated at the most appropriate provider." While this model is very much focused on health care services, it could be applicable to a variety of human services agencies with some minor changes. The graphic below illustrates the various touchpoints in this example:[24]

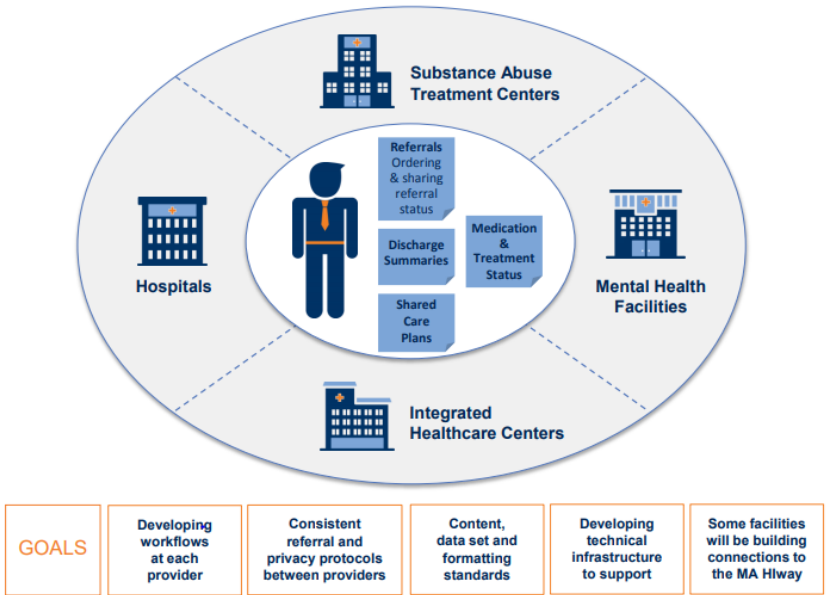


Figure 19. Use case illustration for data sharing to facilitate care coordination.

Use case scenarios generally include a justification for engaging in data sharing with a particular goal in mind. In the scenario depicted in Figure 19, the complete use case includes the organizations involved, the goal for the process, the various systems and trading partners involved in sharing data, the specific kind of data that is being exchanged, and a narrative that illustrates the benefits of this information exchange. The graphic above depicts a client with a substance use disorder and their data, including referrals, discharge summaries, and care plans, that would be shared with the organizations in the outer ring that would provide services to this client.

[24] This graphic, and additional use case scenario examples, can be found at: http://mehi.masstech.org/sites/mehi/files/documents/Use_Cases/Library/PDFs/Use%20Case%20Care%20Coordination%20Substance%20Use%20Disorder.pdf.

ESTABLISH BACK-END SYSTEM ARCHITECTURE TO SUPPORT UNIFIED FRONT-END PROCESSES, DATA ANALYSIS, AND BUSINESS INTELLIGENCE

Clients experience the County as a whole entity through each of the services they receive; having information that's available to each agency the client interacts with helps to align services and the client experience. The quantity of separate systems across human services fosters duplication of effort in data entry, reduces cleanliness and usefulness of data collected, and frustrates the client who goes through multiple intakes while expecting the County to already "know them." Aside from requiring that all agencies use a common system, which is likely impractical due to the requirements of various state- and federally-funded programs and the time/workload requirements for duplicate entry, the best way for the County to achieve the benefits of shared data is a human services data warehouse. Use of a data warehouse allows states and municipalities to identify trends across programs, and in some cases, identify users of multiple services and clients who are shared across agencies.

A data warehouse is simply defined as a centralized repository for data collected by numerous sources, with the ability to manipulate that data as determined to be most beneficial to the user. A centralized data warehouse can be built or bought and pulls data from each of the agencies' systems, consolidating the data so that it can be analyzed to inform best practice, outcome measurement, performance measure tracking, and a more robust understanding of the way in which clients engage across agencies both internal and external to the County. Agencies would need to work together to define or crosswalk data points and entry processes to ensure the quality of data. The systems currently in use would be maintained independently, while a data sharing platform (i.e. Extract, Transform, and Load (ETL) platform) feeds information to the data warehouse through scheduled data sharing batches (i.e. daily/nightly, weekly, bi-weekly). From here, an information system or independent module, can be interfaced, providing various levels of insight such as reports for executive level dashboards, case history information for case manager portals, a consolidated list of upcoming appointments or case manager contact information for client facing portals, and even to support the ability to exchange data with mobile applications.

There are several ways that this can be approached, but the basic concept is that administrative data from each agency would be collected, and an extract from a specified program and period of time would be shared with a centralized database where it could be analyzed alongside data from other agencies and programs. The data warehouse itself can be developed on one of several types of platforms, including:

- Software as a Service (SaaS) – the County would purchase a license (or licenses) to a software package that would be hosted by a vendor, removing the need for the County to manage updates and maintenance.
- Platform as a Service (PaaS) – the County would purchase, instead of or in addition to software, a database environment and / or website hosting capabilities to host its own software. This would eliminate the need for the County to manage these services while also allowing for ease of expansion should a new system be developed and need to be hosted and managed.
- Infrastructure as a Service (IaaS) – the County would pay a vendor to provide or manage almost all aspects of its IT infrastructure, including the network and servers on which platforms or software reside.

The County should examine each of these options to determine which is the appropriate solution given the wide range of software and systems used across human services agencies. It is important to note, too, that if the County pursues a PaaS, it could be used as the basis for the development of a Workflow Management System, as described in Recommendation 8.

The University of Pennsylvania has developed an Actionable Intelligence for Social Policy (AISP) initiative[25] focused on helping government agencies to create Integrated Data Systems (IDS), focused largely on human services providers. The goal of the initiative is to help agencies develop or enhance an IDS as a way to "improve programs through evidence-based collaboration." Prince William County could take advantage of an IDS in several ways:

- Confirm anecdotal evidence suggesting that clients access services across multiple agencies,
- Develop a concrete understanding of the total universe of human service agency clients and the programs that they access,
- Access de-duplicated information about the number of clients receiving services at each agency,
- Determine outcomes for clients who receive services at one or more agencies,
- Compare the population receiving services with the larger population of the county, and
- Test the impact of changes to program interventions and policy changes.

Each of these activities will allow the County to take advantage of this shared data to identify previously unknown issues that are impacting clients across agencies, and to develop and test way to address these issues in an outcome-focused way, instead of just implementing temporary quick fixes or solutions that have worked elsewhere. Access to shared data is a key that can unlock the benefits of information – that the County already has – for clients and staff alike.

The Virginia Department of Social Services has partnered with AISP to support the development of an MOU to share data across multiple secretariats, but the County should narrow its focus at this time to sharing data across its own agencies. The development of a source of shared data will be crucial to the identification and development of strategic partnerships, and to establishing the proper role for each agency in attaining the strategic vision of Human Services.

There are several key considerations to address before implementation of a centralized data warehouse. These considerations include:

- **Feasibility –** A feasibility study and/or requirements mapping should be conducted and used to determine the most practical system architecture, associated cost, recommended implementation timeline, and realistic alternatives for operation and maintenance. Once a "build or buy" decision is made, business process analysis, process mapping, and data definition are necessary to inform an RFP or development plan.
- **Data Governance –** Developing a data governance model drives the integrity of the data collected across human services agencies. While a data warehouse can support and manipulate data from different sources and in a variety of formats, the extractable data is only as valuable as the data that is deposited. Ensuring that clean, quality data is being captured in each of the systems that feeds with the data warehouse, will ensure that the data that is stored is of high quality.
- **Data Cleansing –** Any preexisting data that will be stored in a new data warehouse, or otherwise integrated into a new system, should be thoroughly cleansed (i.e., incomplete or inaccurate records should be repaired or removed) to ensure it is reliable and analyzable. This process can be time consuming and intensive but is a necessary step to improving data utilization.
- **Training –** Any changes to business process or introduction of new technology systems should be supported by comprehensive and role-appropriate training. This may require vendor support and should be a consideration in an RFP for either business process redesign and/or system implementation.

[25] More information about the AISP can be found here: https://www.aisp.upenn.edu/.

Below are some examples of successfully integrated data warehouses:

Washington State Department of Social and Health Services' Integrated Client Database (ICDB) is the singular warehouse where the client information for the 2.4 million individual's the state serves comes together. It draws information from 30 data systems, matching client records using administrative data while maintaining strict client confidentiality and HIPAA compliance. The massive amounts of information Washington compiles allows the state to research and flexibly report on programmatic outcomes, use rates, and counts by any demographic, geographical or economic indicators. The diagram below (Figure 20) illustrates the types of data included in the ICDB and the agencies involved.

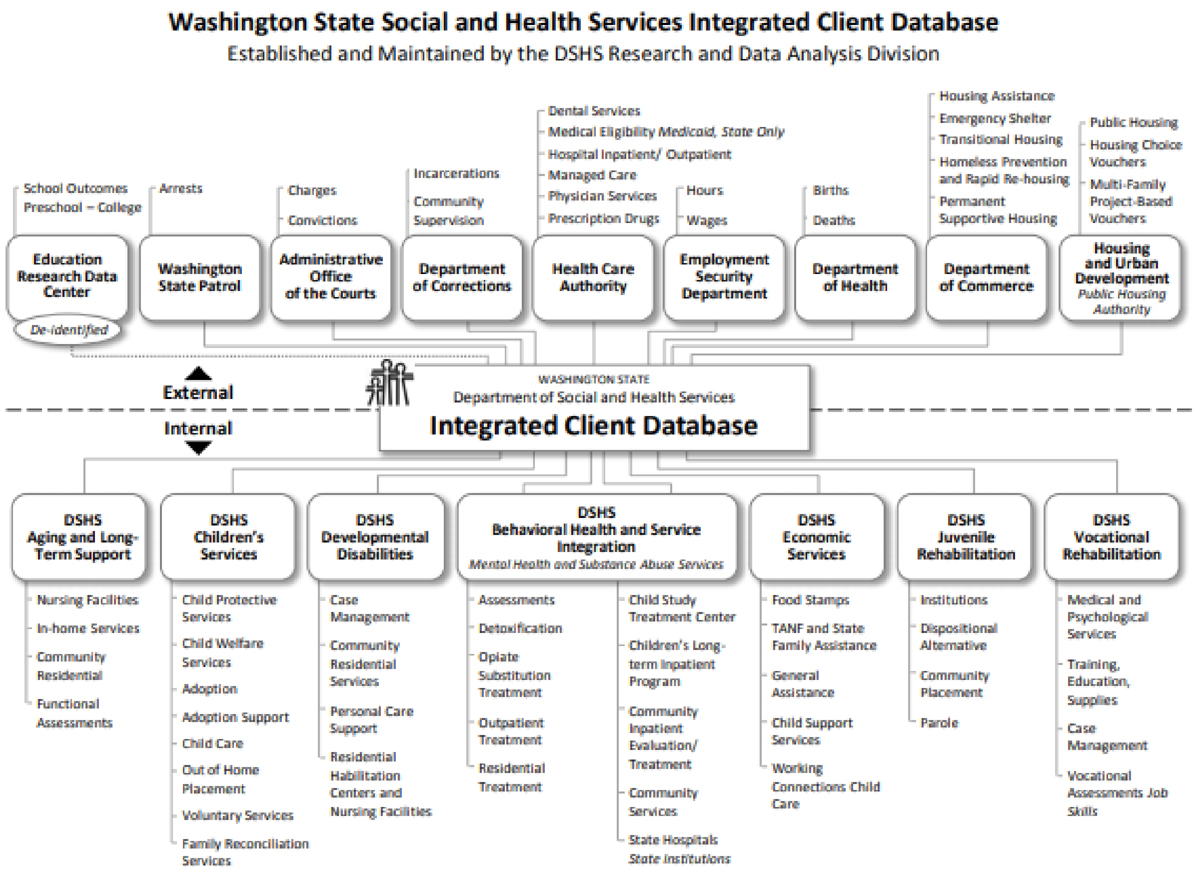


Figure 20. Diagram of data sources for Washington State Integrated Client Database.

Allegheny County, PA is using integrated data collection to do predictive analysis of children at-risk of entering the foster care system. The Allegheny County Department of Human Services (DHS) developed a data warehouse to store information on the DHS clients and the services they receive through DHS. The warehouse includes data from external sources (from DHS to the City of Pittsburgh Housing Authority to local school districts). External partners send information to be loaded into the warehouse through a platform that can accept data in different formats. Each client is assigned a unique identifying number so that all client-specific information can be tracked together. The data warehouse allows department leadership to answer questions such as:

- Who are our clients?
- Are we duplicating services?
- How can we maximize resources by funding the best-performing services and strengthening others?

This data allows the department to make informed, data-driven decisions about service and resource allocation. Furthermore, these decisions can be made in the larger context of population, workforce and income trends that may affect the vulnerable populations served by DHS.

Implementation Plan

The implementation plan for Recommendation 11 includes the steps necessary to Implement System Architecture to Collect and Use Data for Strategic Decision-Making, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all Human Services agencies will be involved in this implementation plan. In addition, county DoIT staff, Finance, and the County Attorney will also have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Increased productivity from staff due to improved ability to share information across agencies.
- Enhanced collaboration to serve clients receiving services from multiple agencies.
- Improve performance measurement capability.
- Business process needs supported by technology, instead of processes that conform to the requirements of technology.

Recommendation 11: Implement System Architecture to Collect and Use Data for Strategic Decision-Making			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
11.1 DETERMINE PRIORITY USE CASE SCENARIO FOR DATA SHARING	11.1.1. Convene the IT working group, and add staff as necessary who have familiarity with and technical knowledge of the systems their agency utilizes. The County may also want state staff to sit in, at times, as part of this plan.	Month 1	✓ Formation of a dedicated project team with relevant technical expertise ✓ Implementation steps reviewed and responsibilities of each team member understood ✓ Schedule of check in meetings determined
	11.1.2. Finalize and document: • Goals of data sharing and expected outcomes • All systems to be mapped and data held within • Mapped uses • The user roles for and client demographic of each system	Months 1-3	✓ Clearly defined goals and outcomes ✓ Comprehensive understanding of purpose of each system ✓ Any overlap of purpose or use of systems identified ✓ Clear understanding of user roles and responsibilities of each system ✓ This should also result in a data map for all systems ✓ Gaps or unmet needs identified
	11.1.3. Engage outside agencies (for state systems, for example), to review data sharing. This process may include data sharing agreements or MOUs.	Months 2-6	✓ Data sharing agreements or MOUs with state agencies. ✓ The shell of a data management strategy
	11.1.4. Map use cases and determine priorities for case scenario(s).	Month 4	✓ Optimal use case scenario determined for data sharing.

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	11.1.5. Identify potential data fields (with consistent definitions across agencies) for trading.	Month 4	✓ List of all data fields that can be traded with partners along with agency providing the data fields ✓ Technical map of data fields to draw from
11.2 DETERMINE BACK-END SYSTEM ARCHITECTURE TO SUPPORT UNIFIED FRONT-END PROCESSES, DATA ANALYSIS, AND BUSINESS INTELLIGENCE	11.2.1. Complete a feasibility study and requirements gathering, including collecting business requirements to inform system needs. If there is no single agency "owner" of the system, the Department will need to complete a cost allocation assessment.	Months 5-8	✓ Technical business requirements mapped ✓ Technical needs and goals clearly articulated
	11.2.2. Review existing Power BI in use at the County to determine if the same product would meet the needs defined in 11.2.1.	Months 9-10	✓ Y/N on existing product(s) determined
	11.2.3. Complete business process analysis, future-state business process mapping, and draft a technical roadmap for either the intended system procurement or development to improve future business practices supporting data collection, management, and analysis.	Months 10-12	✓ As-is and future-state process mapping completed ✓ Business process needs and goals clearly articulated ✓ RFP or technical roadmap drafted
	11.2.4. (As needed) Decision to create RFP or development plan, and perform a cost benefit analysis of build or buy options.	Months 12-15	✓ Decision to using existing BI, build, or buy (SaaS, PaaS, IaaS) made
	11.2.5. If moving forward with RFP: • Seek Technical Review Board approval • Seek Technical Review Board approval • Seek approval from IT Advisory Committee • Secure project on TIP for upcoming FY • Seek TIP approval • Develop and publish RFP • View products and award contract	Months 16-20	✓ System and implementation services are competitively procured to meet RFP requirements

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	11.2.6. If not moving forward with RFP, development team builds system to technical roadmap specifications.	Months 16-22	✓ Current Power BI products are modified to house data and meet technical roadmap specifications
11.3 IMPLEMENT BACK-END DATA SHARING/SYSTEM ARCHITECTURE	11.3.1. Map Risks and Mitigation Strategies.	Month 20-22	✓ Project team identifies risks and documents mitigation strategies for development, implementation/go-live, and user acceptance and system management
	11.3.2. Develop Implementation Roadmap to guide go-live preparation. This should include a Data Governance structure and Data Management Plan. These should stand as the policy and procedures regarding Data Governance and Management.	Month 22-24	✓ Implementation Roadmap completed to document definitive timelines and activities to prepare for system go-live, change management, training, and ongoing activities ✓ Data Governance Structure defined and documented ✓ Data Management Plan, involving policies and procedures, defined and documented
	11.3.3. Identify staff authorized and trained to pull reports. Identify one or more Data Gurus.	Months 22-24	✓ Staff identified
	11.3.4. Cleanse and validate existing data that will be migrated to the new data warehouse to protect the integrity of existing data and future analysis.	Months 24-30	✓ Data cleansed, validated, and reviewed to ensure quality and integrity of migrating data

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	11.3.5. Develop Data Dictionary for any data housed in data warehouse.	Months 24-30	✓ Data dictionary with table structures and fields completed, approved, and circulated for all staff entering data that will be in the data warehouse, their supervisors, staff managing the data warehouse, and/or staff analyzing and reporting on data in the data warehouse
	11.3.6. Migrate existing data to new system and perform user acceptance testing (UAT) to ensure quality of data and that the system and reporting capabilities are ready for use.	Month 30	✓ Existing data added to new data warehouse ✓ User acceptance testing performed
	11.3.7. Create Go-Live plan, including necessary steps for implementation and communication plan for agencies and staff impacted by new system.	Month 30	✓ Go-live data and time scheduled and announced ✓ Implementation steps communicated to agencies and staff
	11.3.8. Provide training to all staff engaging with the new data warehouse and business processes. "Data Gurus" identified in step 11.3.3 can be utilized as "power users" who can address staff questions as needed.	Months 30-33	✓ Training ✓ Issue feedback mechanism
	11.3.9. Solution goes live at scheduled date and time.	Month 34	✓ Data sharing solution is implemented

Dependencies	Implementation Resources
Identify capital to see project through completion	Time
Legal should review or participate in the development of the RFP or development plan and any other data sharing considerations to ensure confidentiality and reporting issues are addressed	Cost of procurement or development

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Data sharing requires a mindset of cooperation, collaboration, comprise.** Often, the reaction to the idea of data sharing is to explain why it isn't possible. Falling into that trap will ensure that no matter what system the County purchases, little progress will be made. **Mitigation Strategy**: County leadership must prioritize finding solutions that will allow for data sharing, and make it known across the board that current barriers can be overcome. A focus on the potential benefits, while maintaining privacy and security for clients (as required by HIPPA and other regulations) may help bridge the gap between what is possible and what is currently being done.

- **Legal issues must be addressed in any data sharing scenario.** Even if the County pursues a de-identified data sharing solution, clients must be notified and proper procedures for handling this data must be established. Failure to properly handle client data would is a risk that each agency currently bears, but it would be magnified in a data sharing scenario where additional parties were involved. **Mitigation Strategy**: Involve County legal staff at all points of this implementation plan, and ensure that they are a part of the working group for this project.

Recommendation 12: Align Program Documents for Clients and Staff

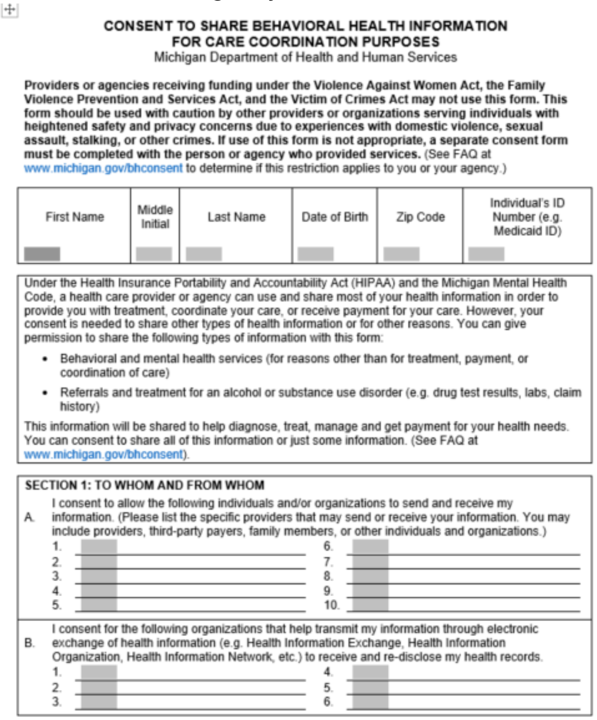
Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Reduce Service Delivery Complexity

Primary Criteria Met

- ✓ Practical and realistic to Implement
- ✓ Addresses concerns raised by agency clients and staff

Consent forms, specifically the need for clients who work with multiple agencies to complete multiple forms to facilitate information sharing, were a frequent topic of discussion in interviews with agency staff. In many cases, we heard that agency staff wanted to share information, collaborate, and work together to best serve clients, but felt stymied by rules or policies that made it difficult to do so. Human Services agencies could create a standard release form that was accepted by all agencies, and work to streamline current forms, verification and documentation requirements (which may require rethinking the county's approach to addressing program regulations around confidentiality), especially at intake. This will help facilitate collaboration across agencies by allowing staff from each agency to reach out to each other directly, knowing that their counterpart will be able to share information once the common consent form has been shared. Creating this form will require input from all agencies and may in fact lead to the creation of a multi-part document that would address the varying needs of clients across different agencies. As shown at left, in Michigan, the state Department of Health and Human Services developed a standard consent form for the sharing of behavioral health and substance use treatment that all providers in the state are required to accept. This is just one example and is provided to demonstrate where agencies have overcome programmatic and silo barriers to streamline the collection of information. The County could develop something of this nature, that deals with a more sensitive type of confidential information, and add a component that would also allow release of case information for DSS, PWHD, or other county services. It is important to note that the Michigan form was developed specifically to address care coordination issues, and that the state also developed a number of supporting documents to ensure that both providers and clients are clear on what information is involved and how it can be used.


CONSENT TO SHARE BEHAVIORAL HEALTH INFORMATION FOR CARE COORDINATION PURPOSES
Michigan Department of Health and Human Services

Providers or agencies receiving funding under the Violence Against Women Act, the Family Violence Prevention and Services Act, and the Victim of Crimes Act may not use this form. This form should be used with caution by other providers or organizations serving individuals with heightened safety and privacy concerns due to experiences with domestic violence, sexual assault, stalking, or other crimes. If use of this form is not appropriate, a separate consent form must be completed with the person or agency who provided services. (See FAQ at www.michigan.gov/bhconsent to determine if this restriction applies to you or your agency.)

First Name	Middle Initial	Last Name	Date of Birth	Zip Code	Individual's ID Number (e.g. Medicaid ID)

Under the Health Insurance Portability and Accountability Act (HIPAA) and the Michigan Mental Health Code, a health care provider or agency can use and share most of your health information in order to provide you with treatment, coordinate your care, or receive payment for your care. However, your consent is needed to share other types of health information or for other reasons. You can give permission to share the following types of information with this form:

- Behavioral and mental health services (for reasons other than for treatment, payment, or coordination of care)
- Referrals and treatment for an alcohol or substance use disorder (e.g. drug test results, labs, claim history)

This information will be shared to help diagnose, treat, manage and get payment for your health needs. You can consent to share all of this information or just some information. (See FAQ at www.michigan.gov/bhconsent).

SECTION 1: TO WHOM AND FROM WHOM

A. I consent to allow the following individuals and/or organizations to send and receive my information. (Please list the specific providers that may send or receive your information. You may include providers, third-party payers, family members, or other individuals and organizations.)

1. 6.
2. 7.
3. 8.
4. 9.
5. 10.

B. I consent for the following organizations that help transmit my information through electronic exchange of health information (e.g. Health Information Exchange, Health Information Organization, Health Information Network, etc.) to receive and re-disclose my health records.

1. 4.
2. 5.
3. 6.

Figure 21. Michigan DHHS care coordination consent form.

Creation of a form like this will have a positive impact on the level of collaboration between agencies with shared clients. This will also help streamline processes for staff who frequently work with clients who participate in multiple programs, or who themselves often must reach across agency lines to obtain information. A form like this will be crucial to allowing each agency access to the pool of data across agencies that will capture shared clients and measure shared outcomes.

Other items that should be aligned, or considerations to better serve clients and staff, include the following:

- General agency forms, such as verification documents or applications for services.

- Data elements requested from clients, to ensure that if an agency asks for information, it can be used by other agencies across Human Services whenever possible;
- Communications materials, both internally and externally, so that a consistent message is being conveyed to clients and staff who access human services; and,
- Guidelines on responding to client inquiries, so that someone who reaches out to a human services agency will receive a consistent level of service in terms of how quickly staff will respond to phone calls or electronic or written communications.

Implementation Plan

The implementation plan for Recommendation 12 includes the steps necessary to Align Program Documents for Clients and Staff, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that Human Resources, DSS, CS, AAA, and OHCD will be involved in this implementation plan. In addition, county and agency legal staff, as well as county Communications staff, will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Forms meet all requirements for program needs and do not expose County to legal challenges.
- Forms are easy to read, interpret, and complete for clients and staff.
- Staff and clients are able to easily understand how to use forms and can see at a glance how they have changed from prior versions.
- Clients will only need to provide information to the County once, and it can be shared among Human Services agencies as needed.
- The number of cases closed or delayed due to missing information is reduced.

Recommendation 12: Align Program Documents			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
12.1 IDENTIFY POTENTIAL FORMS FOR ALIGNMENT AND DETERMINE VIABILITY OF ALIGNING FORMS	12.1.1. Create working group, including agency staff as appropriate and county legal personnel.	Month 1	✓ Form updates will have an “owner” and staff from relevant agencies will be included ✓ Legal involvement from the outset will help identify / mitigate any issues early in the process
	12.1.2. Review forms that are used by county agencies and are not required by other agency (state, federal). Special consideration should be given to: • Forms that are involved in the intake process for a given program • Forms that are used to verify common information (such as income) • Forms that collect different levels of detail on the same kind of information (i.e., an income verification form that requests annual income vs. one that requests income over several weeks)	Month 2-3	✓ Forms with significant overlap are identified ✓ Areas where clients are required to submit the same information to multiple agencies are highlighted
	12.1.3. Determine whether creation of new form for release of information is feasible from legal standpoint. This may involve making connections with state legal unit for DSS to determine potential impact of this document.	Month 2-5	✓ Working group will know whether or not to pursue this option, and will be aware of issued from legal standpoint
	12.1.4. Identify other forms that are similar across multiple agencies and determine whether a combined form could be created.	Month 3-4	✓ List of potential forms for consolidation is created
	12.1.5. Create list of potential new or combined forms and vet with appropriate legal personnel.	Month 5	✓ Any potential problems stemming from combined forms are flagged and addressed
	12.1.6. Provide vetted list to Leadership Group for approval.	Month 6	✓ Leadership Group determines which forms to move forward with combining / creating

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
12.2 CREATE UPDATED FORMS	12.2.1. Working group will incorporate pertinent information from each agency form into combined forms.	Month 6-7	✓ Consolidated forms include information used by multiple agencies
	12.2.2. Develop new forms, if necessary, with input from legal personnel.	Month 6-7	✓ New forms are created that meet requirements of legal team
	12.2.3. Identify and utilize best practices for form design to ensure ease of use. Engage communications / graphic design expertise if possible to advise on layout.	Month 6-7	✓ New forms have easy to use layout
	12.2.4. Test forms with agency staff and collect feedback.	Month 8	✓ Front line staff will apply their experience working with clients to identify issues that can hamper ease of use
	12.2.5. Ensure that required data element collection is maintained with updated forms.	Month 8	✓ New / updated forms will capture all of the same information (if not more) than previous forms
	12.2.6. Program managers at each agency review new or consolidated forms related to their programs and report any problems.	Month 8	✓ Agencies staff at all levels have seen or reviewed new forms and provided comments
12.3 REVIEW AND IMPLEMENT CONSOLIDATED FORMS	12.3.1. New / updated forms are finalized and presented to Leadership Group for final approval.	Month 10	✓ Leadership Group provides final approval for new / updated documents to move forward
	12.3.2. Working group provides instructions / summary of changes for each form, to be shared with staff and clients who will use form.	Month 10	✓ Summary of changes developed and shared

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	12.3.3. New / updated forms are rolled out to relevant staff. Depending on complexity of changes, this could include a simple e-mail introduction, or a webinar or other training method. Centralized contact for issues with forms should be established if major changes included.	Month 11	✓ Staff are provided with the appropriate level of training on any new or updated forms to ensure there is no impact on level of service to clients ✓ Staff can easily report and problems or issues with new forms
	12.3.4. Review of any reported issues / problems with new forms and update as necessary.	Month 12	✓ Staff are aware that issues / concerns will be addressed
	12.3.5. Conduct regular review of forms to establish continuous improvement cycle based on feedback.	Month 12 - onward	✓ Forms will be regularly assessed for additional changes / updates / improvements

Dependencies	Implementation Resources
Availability and willingness of staff, program managers and Leadership Group to review documents	Staff time
Ability of staff to make time for and participate in trainings	Creation of training materials (webinar or paper-based)
Availability and willingness of legal staff to participate in effort	Communications / graphic design expertise (internal, if possible, or external)
Access to all forms across county agencies	
Ability to create release form that is specific to County for federal / state programs	

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Combining forms and creating a shared release may lead to legal and privacy issues.** The security and privacy of client information is a serious concern, and cannot be sacrificed for the sake of convenience. **Mitigation Strategy**: Legal staff should be involved throughout every step in the process to endure that client privacy is not compromised, and that HIPPA compliance is maintained where required. A potential outcome is that no shared release of information form is produced, but that the County is still able to streamline existing forms and develop some information sharing across agencies in a more limited fashion. Input from county legal staff will be crucial in making that determination.

- **State regulations may now allow for the sharing or consolidation of information.** Certain programs may have specific prohibitions against sharing information across programs. It is likely that those programs will need to retain their own documents.

- **Creating new forms may be time consuming.** In cases where there are no existing electronic versions of forms, it could take a significant amount of time to design and create a new form from scratch. **Mitigation Strategy**: Whenever possible, agencies should seek to alter existing forms, and should develop a versioning system to ensure that the most recent edition of any form is in use. In some instances, though, a form may require such extensive changes that a complete redesign is necessary; the workgroup should note those forms and alter anticipated timelines appropriately.

- **Agencies may not be able to agree on what should go into a shared form.** Forms that gather general information should be prime candidate for sharing across agencies, but each agency will have specific data needs that may differ from one another, along with different state requirements. It is possible that there will be cases where agencies will not be able to agree on form or data elements that would make sharing a form worthwhile.

- **Some forms may end up being longer than the agency-specific forms.** In a similar vein, the need to include the relevant information for multiple agencies on a single form may lead to updated forms being longer than the forms there are replacing. This may lead to the need to spend a bit more time at the beginning, but should still save clients from having to fill out multiple forms asking for the same information.

- **Inadequate training could lead to confusion for staff.** Simply presenting the updated forms to staff without adequate explanation for why changes have been made is likely to lead to low rates of adoption of the new forms, or to clients who fill out multiple forms because they are not clear about updated requirements. **Mitigation Strategy**: Training efforts, and the involvement of agency staff at all stages of this plan, are crucial to avoiding confusion and ensuring that both staff and clients benefit from these updated forms.

Recommendation 13: Create a Liaison for Strategic Partnerships Position

Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Adopt Innovative Practices

Primary Criteria Met

- ✓ Practical and realistic to implement
- ✓ Impacts multiple agencies
- ✓ Cost-effective

Prince William County should create a position focused on developing partnerships both across human services agencies and between agencies and community partners. These strategic partnerships should seek to build bridges between agencies and stakeholders and leverage resources across the community, while moving Human Services agencies towards achieving the shared vision and outcomes that they seek for clients and the community as a whole. The figure below provides a high-level summary of the elements of the role of the Liaison for Strategic Partnerships.

In developing this position, the County should draw on examples from across the public, private and non-profit sectors to create a job description and identify an appropriate candidate. This position requires someone who will be able to focus on carrying out current work with community partners while at the same time working across County agencies to identify areas where they can work closely to achieve shared outcomes. Some examples of job duties for the Liaison for Strategic Partnerships position include the following:

- Help to create and use shared measures across agencies;
- Work closely with County and agency leadership to identify potential demonstration or pilot projects, and develop and lead those projects;
- Develop a framework to evaluate demonstration and pilot projects to determine whether they should be brought to scale across Human Services;
- Develop budgets and recommend personnel allocation for both demonstration and permanent partnership projects;
- Monitor and manage relationships between key personnel at county agencies and community partners;
- Conduct outreach to and engage new potential partners from across the range of county stakeholders, both within the human services field and within the business, faith-based, and non-profit communities;
- Conduct regular meetings of county agency leadership to review current cross-agency activities and identify and build out new opportunities; and
- Determine if there are services that the County should work with an outside vendor to provide, either through a partnership with a community partner or a procurement.

Internally, the Liaison for Strategic Partnerships will have an important role in building and maintaining the connection between the shared vision for Human Services agencies and the individual vision and priorities for each agency in achieving that shared vision. The person in this role should be tasked with exploring areas for collaboration across agencies, developing an outline or plan for each opportunity, and soliciting executive sponsorship prior to working with agency staff on implementation planning. As a potential starting point, the Liaison for Strategic Partnerships should review current Memorandums of Understanding (MOUs) between human services agencies and determine whether they are properly aligned with Human Service's strategic vision or if adjustments to the agreements are required. Agency leadership have noted that in the past there were MOUs between almost every agency, but these MOUs have been allowed to lapse. These should also be reviewed with an eye towards developing a more cohesive, comprehensive system of partnerships among agencies, rather than a series of "one-off" MOUs to address a single issue or topic.

Externally, the Liaison's role will be to serve as the face of human services in the County for community stakeholders. Instead of being required to navigate multiple agencies to develop a partnership, community organizations will have a primary contact who will be incentivized to focus on their particular concern, and who will be at a level of seniority within the County to move things forward. The Liaison should also look to formalize any current arrangements with community partners, and to ensure that any partnership agreements include written confirmation of goals, expectations and measurements to determine whether changes to the partnership are required.

Implementation Plan

The implementation plan for Recommendation 13 includes the steps necessary to Create a Liaison for Strategic Partnerships Position, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that all county Human Services agencies and Public Works will be involved in this implementation plan. In addition, county Human Resources staff will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Increased cooperation and coordination between faith-based, not-for-profit and private sector partnerships to address human service needs.
- Partnership with county-wide community coalition.
- Increased partner capacity.
- Efficiencies across HS agency staff.

Recommendation 13: Create a Liaison for Strategic Partnerships Position			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
13.1 DETERMINE SPECIFICS OF POSITION	13.1.1. DCXO, along with Project Leadership Group, should determine how this role can best meet the needs of Human Services Agencies 13.1.1.a. Determine need for liaison / partnership with county-wide community coalition. 13.1.1.b. Determine whether this position would be appropriate to oversee Human Services call center, if implemented, or other interconnectedness efforts. 131.1.c. Identify appropriate role for coordination across internal partners (other County agencies) and external partners (beyond the community coalition).	Months 0-1	✓ Clear understanding of role for this position ✓ Identification of key elements of position to inform job description
13.2 INITIATE HIRING PROCESS	13.2.1. Work with the DCXO to develop hiring strategy and process for a new full-time employee (up to 1 FTE) to assume the Liaison for Strategic Partnerships (LSP) position. 13.2.1.a. Confirm LSP was approved in FY19 budget. 13.2.1.b. If position unaccounted for in this year's budget, DCXO to determine if there are funding opportunities during the year. 13.2.1.c. If there is not an opportunity to hire this year, develop a strategy to account for the position in the FY20 budget.	Months 1-2	✓ Confirmation of funding for position (this year or next)
	13.2.2. The DCXO develop hiring strategy along with agency leadership. DCXO should also confirm role for this position, which may include oversight of Human Services call center and liaison role with community coalition.	Month 2	✓ Create hiring strategy and begin hiring process
	13.2.3. Identify oversight agency and supervisor for this position.	Month 2	✓ Designated supervisor (acknowledging the need to coordinate *across* agencies)

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	13.2.4. The hiring manager will review and draw upon examples across sectors to create a job description that will guide the hiring process. This job description will include just fundamentals as: • Knowledge of the HS community in the County or similar experience • Ability to work independently with minimal supervision and direction • Strong skills in facilitation and consensus-building • Strong work ethic, ability to meet tight deadlines, and excellent organizational skills	Month 3	✓ Create a quality and encompassing job description
	13.2.5. Advertise the job listing. 13.2.5.a. Announce job opening on the county website and others such as Indeed. 13.2.5.c. List job opening until position if filled.	Month 4-5	✓ Advertised posting
13.3 REVIEW APPLICATIONS AND CONDUCT INTERVIEWS	13.3.1. Begin review period of the applicants. 13.3.1.a. Create a preferred list of the top 5-10 applicants and start interview process.	Month 5	✓ Short list of potential hires to review
	13.3.2. Interview potential candidates. 13.3.2.a. Create criteria for evaluating interviews that can be used throughout the hiring process. 13.3.2.b. Create an interview panel and plan, designate dates, places, and questions. 13.3.2.c. Check references of candidates.	Months 5-6	✓ Preferred candidate ✓ Transition plan if hire is internal
13.4 HIRE AND UPDATE ORGANIZATIONAL STRUCTURE	13.4.1. Offer employment to desired candidate and (as needed) begin the process of obtaining, background checks, drug testing, and other necessary actions.	Month 6	✓ Offer of employment ✓ Hiring timeline
	13.4.2. Ensure LSP is provided with the necessary contacts and guidance to complete a successful transition into the new position.	Month 7	✓ LSP assumes new role and successfully carries out job duties

Dependencies	Implementation Resources
Funding and approval for the position in FY19; timelines will have to be reset if the position isn't approved until FY20	Funding
	Leadership Commitment

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Funding for new staff member may not be available.** In the past, despite a demonstrated need and desire for a position of this nature, the County has been unable to identify funding for an additional FTE. Adding this position will require competing for limited County dollars against many other priorities for funding. The County can make a strong case for funding by demonstrating that the partnerships developed via this position will generate savings and efficiencies while providing access to additional services for County residents. **Mitigation Strategies**: Designate an existing position to — at a minimum — coordinate activities for key partners across the HS agencies.
- **Position is usurped for other activities.** There is, too often, a tendency to use positions such as this as a "catch all" for new initiatives and/or work that needs to be done on behalf of the Human Services agencies. While additional duties can be entirely within the scope of this position, the County should be aware of the core responsibilities that are laid out at conception. **Mitigation Strategies**: Leadership over this position should remain aware core function of this position, be constantly monitoring their utilization and workload, and be cognizant of assigning activities outside of that core function.

Recommendation 14: Coordinate Back Office Support Across Human Services

Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Realize Operational Efficiencies

Primary Criteria Met

- ✓ Creates value for both agencies and clients
- ✓ Impacts multiple agencies

The opportunity to streamline administrative support activities has the potential to reduce costs and allow funds to be reallocated toward additional services. While it may not be necessary to consolidate these functions across all seven agencies, DSS, CS, and AAA all have budget lines devoted to administrative activities that include human resources, financial operations including grants management, and information technology services, and OHCD also funds administrative activities, although funding that can be used for these is restricted in some ways (such as for the Housing Choice Voucher program). The Human Services agencies, independently as well as collectively, allocate a substantial amount of their operating budget to administrative functions. Even within agencies, total consolidation is likely not necessary, but some opportunities for increased coordination of these services and therefore decreased cost exist in the following areas.

Human Resources – Consolidating any human resources or personnel activities across Human Services agencies will provide the dual benefits of removing these responsibilities from the plates of agency leadership and allowing for a more coordinated approach to hiring, training, and personnel management across the department. By layering department-wide competency requirements with agency-specific business needs, a consolidated HR unit can ensure that all Human Services agencies take a consistent approach to hiring. Further, this unit can help develop onboarding activities that will ensure that the strategic vision for Human Services, and each specific agency, is kept at the forefront from the very beginning of employment. This unit could also work to alleviate any pay inconsistencies across agencies and take steps to address the loss of staff to other jurisdictions due to disparities in compensation.

Finance/Accounting – The County should consolidate agency-specific accounting and finance functions, including grant management, where feasible, into a single group. This group would be better able to respond to the needs of multiple agencies in a coordinated way. The fiscal component of grant management could also be handled by this consolidated group – this would provide an easier path for community partners who receive grants from multiple agencies, currently necessitating numerous different reporting requirements, invoices, and agency contacts. This consolidation is unlikely to reduce the number of staff required, at least at the outset, but will free agency leadership to focus more on programmatic and customer service issues, and create consistent practices that will benefit agencies and their stakeholders.

Information Technology (IT) – As detailed in PCG's "Current Challenges" report, there are 48 different IT systems used within the seven human services agencies. The County should consolidate the management and oversight of these systems into a single unit, with an eye towards finding a way to reduce the number of redundant programs. This unit should also develop ways to integrate the work that agencies are doing across multiple platforms so that information may be more easily shared. If a common consent form across agencies is developed, it is crucial that staff be able to share information across systems to be able to serve clients without forcing them to repeat their information to staff at multiple agencies. The example of the DSS Homelessness Coordinated Entry Team can be informative, in that some client information is entered into a system accessed by community partners at the time the client first calls the coordinated entry hotline, reducing the need for the client to provide basic demographics more than once.

Fleet Management – The County has already consolidated fleet management within its Department of Public Works. Access to vehicles for Human Services staff, particularly within DSS, CS, and PWHD, is crucial for those who work in the field, make home visits, or conduct child welfare activities such as home removals. Staff at these agencies expressed concerns about the availability of vehicles as well as the process to access them, which often required them to go out of their way and use additional time that could be better spent serving clients. Human Services agencies could request an allocation of cars that it could then distribute across all agencies as needed, rather than forcing each agency to compete across the entire pool of county vehicles. While Human Services agencies should not look to take on fleet management responsibilities, consolidating the requests of these agencies, and creating and managing an electronic scheduling system so that staff can reserve cars in advance, would streamline access to vehicles and provide a stronger voice for human services agencies at the broader County table on this issue.

Communications – The County could create a central point of origination for all internal and external communications, providing the benefit of reinforcing common branding elements and messaging across agencies, as well as ensuring consistency of message around issues that impact multiple agencies, or shared clients. Human Services could also take the lead on creating and updating marketing materials and informational pamphlets, to ensure that the most up to date information is being shared with the community. When an event, change, or disruption of services is planned, Human Services can coordinate outreach efforts to minimize the impact on stakeholders. This role will be especially important as Human Services becomes cohesive; clearly and frequently communicating vision and goals, as well as any operational changes that are set to take place, will help to reduce staff and client anxiety over the unknown.

In order to achieve the buy-in at the agency level that is necessary to consolidate these functions, the County will need to provide assurances to agencies that their access to operations staff will not be limited once they are moved outside of their direct purview. One way to do this is to assign an on-site point of contact(s) for each agency at the department level for each of these functions, and to make sure that consolidated staff prioritize urgent requests for information (during budget development, for example). It will also be crucial for the County to continue to emphasize the subject matter expertise needed for each agency within these roles, acknowledging that even within the same position, there are differences across agencies in the specific work that they do.

Implementation Plan

The implementation plan for Recommendation 14 includes the steps necessary to Coordinate Back Office Support Across Human Services, and includes a table with key tasks and action steps, estimated timeframes that can be applied to any projected start date, and expected outputs or deliverables. The boxes below highlight the agencies that will be involved in the plan, as well as the anticipated outcomes, or goals, of the implementation effort.

Agencies Involved

It is anticipated that AAA, CS, OHCD, and DSS will be involved in this implementation plan. In addition, county DoIT and facilities staff will have roles in elements of this plan.

Anticipated Outcomes

The County should anticipate the following outcomes from the implementation of this recommendation:

- Duplication of common tasks across agencies will be reduced.
- Capacity of program staff will be increased as back office tasks are consolidated within units already performing these tasks.
- Greater focus will be placed on the client experience as fewer staff are required to split time between programmatic and administrative functions.
- Economies of scale may be realized by organizing common tasks across agencies.

Recommendation 14: Coordinate Back Office Support Across Human Services			
Task	**Action Steps**	**Est. Timeframe**	**Expected Outputs or Deliverables**
14.1 IDENTIFY AND REVIEW TASKS THAT ARE COMMON TO MULTIPLE AGENCIES	14.1.1. Convene Human Resources working group to identify and review activities that are not agency specific. This review should include, but not be limited to: • Human Resources • Finance / Accounting / Payroll • DoIT • Communications • Fleet Management	Month 1-2	✓ Potential universe of consolidated activities is identified
	14.1.2. Assess whether the ways these tasks are carried out at different agencies are substantially similar, or if there are agency-specific components (e.g., special payroll rules, or hiring policies at a given agency).	Month 2-3	✓ Potential list of consolidated activities is further narrowed to those tasks that are substantially similar in the way they are carried out across agencies
	14.1.3. Determine the number of FTEs at each agency devoted to common tasks.	Month 2-3	✓ Level of staff efforts expended on common tasks is identified
	14.1.4. Determine how these FTEs could be allocated to support client needs if common tasks were consolidated.	Month 2-3	✓ Potential benefits for client experience of consolidating tasks are identified
	14.1.5. Review findings with Leadership Group to determine appetite for potential consolidation of tasks.	Month 4	✓ Leadership Group provides guidance on whether / how potential consolidation should move forward

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
14.2 DETERMINE WHETHER CAPACITY EXISTS TO CONSOLIDATE COMMON ACTIVITIES	14.2.1. Identify any agencies where staff are dedicated to a given activity (as opposed to staff who handle these tasks in addition to other program-related work).	Month 5	✓ Teams that could easily be expanded to take on additional similar work are identified
	14.2.2. Explore possibility with unit directors of combining specific functions across agencies (e.g., one agency handles payroll activities for its staff and the staff of other agencies).	Month 6	✓ Managers and supervisors provide input into possible future staff alignment
	14.2.3. Identify FTEs that would need to be shifted in order to support consolidation of activities.	Month 7	✓ New alignment of staff across agencies is established
	14.2.4. Develop management and org structure for teams handling consolidated tasks. Options include: • Adding staff to existing teams • Creating an "umbrella" team to manage a task across agencies • Maintaining staff at each agency to manage these tasks	Month 8-9	✓ Structure of teams that will manage consolidated tasks is developed and is properly aligned with the work being done
	14.2.5. Determine if staff will need to be relocated, and if so, where they will sit.	Month 8-9	✓ Locations of staff established, and staff informed of where their new assignment will be
	14.2.6. Review options for potential structure with Leadership Group, CXO, and board as necessary.	Month 10	✓ Plan for consolidating staff received executive / board approval and can move forward
14.3 CONSOLIDATE COMMON ACTIVITIES	14.3.1. Secure approval for plan for consolidated activities from Board / CXO.	Month 10-11	✓ Plan is approved and can move forward

Task	Action Steps	Est. Timeframe	Expected Outputs or Deliverables
	14.3.2. Develop communications plan for staff who will be impacted and for staff who will interact with consolidated activity staff.	Month 12	✓ Staff will be informed of any changes well in advance of implementation, and all agency staff will be made aware of what is being changed and the expected benefits
	14.3.3. Develop transition timeline for staff who will have a change in activities or supervision.	Month 12	✓ Clear guidance on changes will be provided to staff and management so that there is no interruption in work / service and no impact to clients
	14.3.4. Identify and address and facilities or IT issues that need to be addressed due to any reorganization or relocation of staff.	Month 12-14	✓ Facilities and IT issues will be resolved prior to transition
	14.3.5. Set go-live date for consolidation of activities and begin implementation of transition activities.	Month 14-16	✓ Activities are consolidated, efficiencies are gained, and additional time can be devoted to serving clients

Dependencies	Implementation Resources
BOCS and CXO approval	Staff time, including working group, DoIT and facilities
Willingness of agencies to even participate in process of reviewing tasks	Possible need to move / acquire furniture for relocating staff
Ability to identify tasks for consolidation in Task 14.1	Information on staffing and roles of staff handling back-office tasks at each agency

Risks and Challenges

There are a number of potential risks and challenges that the County may face during the implementation of this recommendation; in some cases, these are tied directly to the dependencies and implementation resources noted in the implementation plan table. In this section, we lay out these potential risks and challenges, as well as some ways that the County could look to mitigate them.

- **Communicating the need for change and its potential benefits may be difficult.** Making the case for consolidating back office functions, especially to people who are not directly familiar with these functions and how they are currently carried out, can be difficult. **Mitigation Strategy**: The County must invest enough time in determining some concrete benefits to these changes, to staff and clients, that can be used to build support for these activities.

- **FTEs may need to be shifted across agencies or program areas.** In cases where agencies have allocated partial FTEs to administrative tasks, staffing may need to be shifted, or roles may need to be changed to account for the additional time that can now be assigned to program activities. This could result in changes to long-standing work arrangements for staff.

- **The actual impact on client experience may be minimal depending on tasks consolidated.** Changes to the payroll process, for example, may not be felt directly by the clients of an agency. **Mitigation Strategy**: In order to make the broadest impact, the County must look at opportunities to shift resources away from back office tasks and on to client-facing activities whenever possible.

- **Executive sponsorship will be necessary to move forward.** Changes to centralized and administrative functions will require buy-in by leadership at both the agency and county level. **Mitigation Strategy**: It will be important for the County to combat the impression that there are “winners” and “losers” produced as part of this process by emphasizing the shared benefits of any coordination of back office support, and the overall positive impact it is anticipated to have on the client experience.

Recommendation 15: Unify Health and Human Services Agencies Under A Single Umbrella

Primary Goals Achieved

- ✓ Increase Integration and/or Alignment of Services
- ✓ Adopt Innovative Practices

Primary Criteria Met

- ✓ Positive impact on client experience
- ✓ Creates value for both agencies and clients

Note: The County is not actively considering Recommendation 15 for implementation at this time. The County should review this recommendation and consider revisiting it once it is further along with implementation of other recommendations in this document, to determine whether unifying health and human services agencies under a single umbrella may be the best way to impact the client experience at that time. No implementation plan has been developed for this recommendation at this time.

The County can take an important step towards creating a more collaborative model by unifying services into a single department, creating common documents, applications, and forms, and, most importantly, developing and clearly articulating a shared vision for the unit and the role of each agency within it. Creating a single Human Services Department (HSD) with oversight over county human services agencies would align the services provided by each agency with the needs of clients, and with the County's broader outcome goals for the population served. Currently, each agency is focused intensely on the services it provides and the regulations and requirements that govern those programs and that impact agency funding. The leadership of the state and county agencies providing human services in the County have been meeting regularly. While this provides a forum for discussion and collaboration at a very high level, it has not unified these entities in a meaningful way.

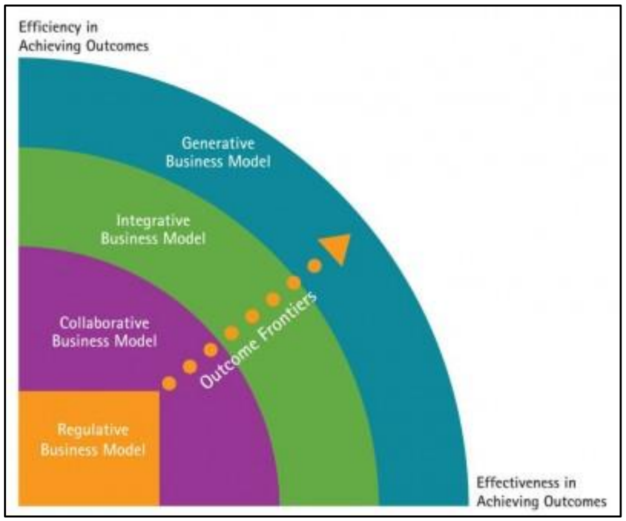


Figure 22. Human Services Value Curve.

Researchers at Harvard University developed a "Human Services Value Curve," which includes four sets of competencies that help an organization determine how it can move from a focus on basic program requirements to a focus on developing solutions addressing larger socio-economic issues and creating outcomes that can impact the larger community. Although efforts are being made to focus agency leadership on a broader set of goals driven by the County Executive and the Board of County Supervisors, particularly tied to improving the client experience, the organization as a whole has not sufficiently advanced beyond the regulative business model seen at level one on this curve (Figure 22). Organizations that fit into this model are characterized by programmatic alignment with funding sources, and by the creation of information technology systems and program management tools that are designed to support the activities of a single program or group of programs.

It is our recommendation that all human services agencies work to move along the curve. The next step, the "collaborative" business model, calls for organizations to move beyond program silos and work together to ensure that county constituents receive the services necessary to meet their needs in the short- and medium-term. The County is already pursuing some strategies in this vein, such as the coordinated entry system used to assist those at risk of or experiencing homelessness, and its investigation of a more general "no wrong door" approach to human services provision, but additional steps are needed to move forward.

The next step towards unifying services is to create a department with direct oversight over the four county human services agencies, as well as over any funding provided to the three non-county agencies that currently fall under the human services umbrella. Creating a dedicated HSD will formalize the linked nature and shared vision of these agencies in the minds of agency leadership, staff, and clients. This will also create a level of accountability that extends beyond each agency and each agency's specific mission.

Creation of an overarching entity to manage all human services provision will provide tangible benefits to the County, including the following:

- Focusing agency leadership and staff on **higher-level/more-impactful outcomes** for clients.
- Putting in place **the framework of an organization that is larger than the sum of its constituent agencies**, and that feeds into the larger mission of County human services. This framework can help the Deputy County Executive for Human Services (DCXO) and agency leadership to take the next step towards breaking down barriers between agencies and sharing information on a regular basis.
- Addressing concerns of agency staff, as revealed in the results of surveys conducted by PCG. When asked to rank thirteen potential changes to service provision by level of positive impact on clients, 65 percent of staff who responded to PCG's staff survey ranked "**Better communication between other human services agencies around shared clients and/or resources available**" in their top five choices. While the creation of an HSD would not, in itself, ensure that communication across agencies improved, it would provide the County with an important forum to address this issue and tools to enhance cross-agency collaboration.
- Allowing agencies to **identify and realize significant cost savings, cost avoidance, and the ability to leverage additional resources**, or identify new revenue sources, across county departments.
- Allowing for the improvement of business processes and **sharing of best practices across agencies**.
- Enhancing the **organizational and collaborative capacity of each agency** and county human services as a whole.

In the last 5 years, **34 (of 100) North Carolina counties have consolidated** some or all of their health and human services agencies under an umbrella agency. These include the 3 largest counties: Wake (Raleigh), Mecklenburg (Charlotte), and Guilford (Greensboro). **In Buncombe County (Asheville) the County calculated over $15M in additional revenue/leveraged dollars, tangible savings, and cost avoidance during FY12-FY14 from actions initiated through the integration of Human Services and the creation of a HS Support Team in FY06-FY14.**

Unifying agencies that provide human services under a single umbrella will have a transformative impact on the way service delivery is managed, and on the experience of clients seeking services. The County has already taken a step down this path by creating a DCXO position with oversight of these agencies. Currently, though, there is little actual structure around this position to allow the DCXO and agency leadership to take advantage of the potential benefits of an aligned organization. Many counties across the country have moved to consolidate all or part of their human services delivery systems, both to take advantage of efficiencies that are possible when common functions for multiple agencies are combined into a single unit, and to better coordinate the services made available to clients. Some examples include:

- **Fairfax County, VA** – The Department of Administration for Human Services (DAHS) provides support to the human services system around operations management, contracts and procurement, financial management, human resources, and physical resources. Although Fairfax is planning to make some changes to the way it manages its human services system in FY19, including allocating some of the activities of DAHS back to agencies, a new agency has been proposed to manage strategic initiatives and inter-agency work.

- **Clackamas County, OR** – The Health, Housing and Human Services (H3S) Department oversees seven divisions providing services, and provides support around management and data analysis. The services provided by H3S are a combination of state and locally administered and funded services. More information and shared outcomes or the Department can be found at https://www.clackamas.us/h3s/improvement.html
- **East Baton Rouge Parish, LA** – The Division of Human Development and Services provides administrative and fiscal management for all social services and community development programs funded by the federal and state governments.
- **Boulder County, CO** – The Boulder County Department of Housing and Human Services (BCDHSS) merged formerly separate Housing and Social Services Departments in 2009 to create a single, fully integrated human services agency, comprised of county-run agencies. The seven divisions include a Finance unit that handles budgeting and procurement for the Department. The County also created a Business Operations and Systems Support unit that supports business process optimization and technology implementation across the all divisions. BCDHSS is often cited as a leader or example for others. A recent Governing article quoted the Boulder Housing and Emergency Services Coordinator as stating, “In the seven years since the Boulder merger, the county has embraced a new mindset about the connectedness of social programs. We’ve got child protective services workers who now feel comfortable sharing something with a housing case manager, who previously might have been viewed as the enemy because they were looking to kick someone out. That sort of evolution has occurred because of our shared mission.” More information can be found at http://www.governing.com/topics/health-human-services/gov-housing-health-mergers-boulder.html

The organizational chart to the right (Figure 23) draws from several of the recommendations in this document to present a potential format for staffing and oversight of the HSD (see Recommendations 9, 13, and 14 for additional information). In this example, the agency directors retain oversight over their agency activities. The County would need to decide whether direct oversight of the activities of the HSD should be handled by the DCXO; if the current demands on the DCXO’s time are too intense, the County may wish to add an additional position (HSD Director, not shown on chart) to the organizational structure. Either way, agencies themselves will continue to manage their work, while working with the HSD to align it with its larger vision and mission.

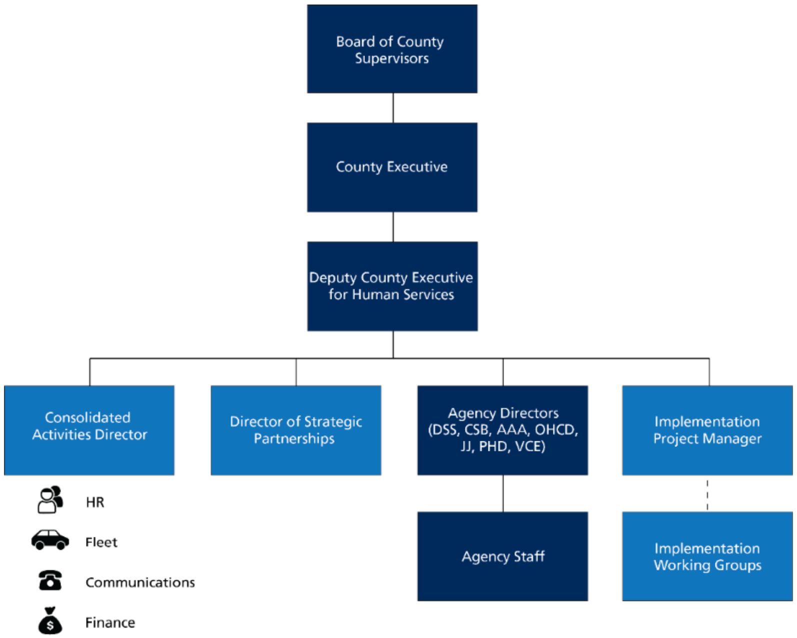


Figure 23. Organizational chart for potential staffing of Human Services Department.

In addition to the creation of new roles (highlighted in light blue) and additional duties, these changes should be formalized in a way that impacts the everyday life of employees. All agency staff should receive badges or other identifying materials that clearly state that they are part of the HSD; the County should develop an intranet site and social media presence to reinforce the new model of doing business both internally and externally; and provide informational flyers and in-person outreach to answer questions that staff may have and inform them of the benefits of this new model. Of course, prior to implementing the new organizational structure, agency leadership should engage in the proper level of visioning with staff so that they are aware of coming changes and why they are being implemented, but following that up with additional outreach during and after implementation is crucial to maintaining staff buy-in.

Recommendation 16: Conduct a Workload Study for Selected Programs

Note: The County is not actively considering Recommendation 16 for implementation at this time. The County should review this recommendation and consider revisiting it once it is further along with implementation of other recommendations in this document, to determine whether a workload study at that time could help County to enhance the client experience. No implementation plan has been developed for this recommendation at this time.

Primary Goals Achieved

- ✓ Realize Operational Efficiencies
- ✓ Improve Client Experience

Primary Criteria Met

- ✓ Draws on best practices nationally and locally
- ✓ Cost-effective

During the discovery phase of this project agency leaders and staff at CS, AAA, and DSS reported that staff turnover and shortages were resulting in high caseloads for staff across program areas and impacting their ability to provide timely, high quality services to clients. Additionally, some human services agencies and program areas may be overstaffed resulting in staff inefficiencies. County leaders must carefully consider how they value providing community-based services in multiple locations, versus maximizing staff efficiency and productivity, as the two may at times be in conflict with each other.

Before adding additional positions at agencies, we recommend that the County conduct workload studies with specific programs experiencing high turnover and/or high workloads or those where programs may be overstaffed. When considering how an agency is over/under staffed the following rubric for inquiry can be helpful:

<table>
<tr><th>Instead of asking…</th><th>Ask…</th><th>The answer will be…</th></tr>
<tr><td>What is the ideal caseload for a particular program or service offering?</td><td rowspan="2">What is the optimal workload for staff based on the time required to accomplish tasks or have good outcomes?</td><td rowspan="2">We need X number of caseworkers to account for all the time required by the existing caseloads.</td></tr>
<tr><td>How many cases can a staff person have and still do a good job?</td></tr>
</table>

A workload study will answer two research questions:

1. *How much time do staff have available to handle cases?* This will answer how much time staff actually have available to work on cases as opposed to other parts of their job (administrative tasks, documentation, training, etc.) This is best measured using a Random Moment Survey (RMS) instrument. An RMS is typically distributed via email to staff who are directed to complete an online tool to capture their activity at that moment.

2. *How much time does a case take when standards or polices are met?* This will use a specific case type as a unit of analysis and require staff to complete a Time Study to understand how much time it takes to fulfill casework functions in order to meet policy requirements.

The resulting analysis will help agency leadership determine if additional staff are warranted to meet the workload demands or if other process changes can result in increased efficiency.

A typical workload study follows the high-level methodology outlined below:

Task	Description
Initial Survey	• Leadership establishes which types of cases and staff should be involved in the study • Interview program management and staff • Review program documentation and reports • Breakdown workload into high-level subdivisions based on function and/or organizations
Mapping	• Map business processes for each subdivision
Define case types and activities	• Conduct focus groups with staff to understand the types of cases and activities conducted • Create definitions of case types and activities
Data collection	• Conduct Random Moment Survey (RMS) • Conduct Time Study
Data Analysis	• Analyze findings from RMS and Time Study to develop framework to answer how many caseworkers are needed to account for the time required to meet existing caseload demands.
Recommendations	• Formulate and evaluate recommendations regarding workload

A workload study can also help agencies determine if an agency has the capacity to serve non-English speaking clients. Staff, clients, and community partners all reported a need for agencies to better accommodate non-English speaking clients with staff and materials in their native language. We heard from a number of agencies that bilingual staff end up with additional work as they are responsible for their own jobs as well as interpreting for their colleagues. While many agencies use telephonic interpretation services, we heard that these are commonly inadequate and can actually impede high quality services. We recommend that agencies conduct a workload study to determine the need for bilingual staff and then invest in recruiting and retaining bilingual staff. In order for the workload study to accurately capture the need for bilingual staff (or interpretation services) the agency needs to be able to quantify the number of cases which require bilingual staff or translation services and capture a statistically significant number of these cases to measure the added time need to provide these services. This information can help the County determine whether expanding access to and the capacity of translation services, as discussed in Recommendation 2, is an appropriate use of resources.

APPENDICES

Appendix A: Example Criteria to Select Renovation Activities

Criteria		Description
1.	Client Impact	*How will this renovation impact the client's experience with human services? Will it increase their comfort or make services more accessible?*
2.	Staff Impact	*How will this renovation impact human services staff? Will it increase their comfort or efficiency?*
3.	Safety	*How will this renovation impact the safety of building occupants?*
4.	Effort	*How much effort is required to make this renovation?*
5.	Timeframe	*How long will it take to make this renovation?*
6.	Cost	*How much will this renovation cost?*
7.	Funding Available	*What funding is available to support this renovation?*
8.	Ownership	*Is this renovation intended for a county-owned property? If not, can these renovations be paid for or approved by the owner?*

Appendix B: Renovations and Potential Funding

	Location	Description	Potential Source(s) of Funding[26]
1.	Ferlazzo	Improve CS waiting room area with new lighting	Public Works
2.	Ferlazzo	Replace the intercom system at DSS to improve communication at the front desk so staff and clients can clearly hear each other at a reasonable volume.	Public Works DSS budget request
3.	Ferlazzo	Renovate the CS bathroom so a single person bathroom is available for observed urinalysis.	CS budget request
4.	Sudley North	Renovate CS lobby area so a single bathroom stall is available for clients and visitors in the waiting area	CS budget request Building landlord
5.	Sudley North	Renovate CS bathrooms so a single person bathroom is available for observed urinalysis.	CS budget request Building landlord
6.	Woodbridge Juvenile Justice	Install wireless internet service to improve staff's ability to work efficiently from their desk, meeting rooms or common areas.	County Public Works / Facilities funds
7.	Ferlazzo	Family visitation room at Ferlazzo	Department of Social Services Budget Request
8.	Ferlazzo and Sudley North	General signage inside and surrounding the building	Public Works[27] Agency operation budget request

[26] Inclusion on this list does not imply that funding is available or constitute approval. Final eligibility must be determined by the appropriate authority who authorizes funds. This list is provided as guidance only.
[27] Public Works indicated that smaller signage requests may be funded by the Public Works Department, but requests for new or more significant signage would need to be funded by the agency making the request.

Appendix C: Information to Support Request for Central County Human Services Building

Recommended occupants include:

- Centralized Human Services administrative staff including agency directors, human resources, information technology, and finance.
- Home- and community-based program staff who travel around the County to deliver services to clients. Programs may include:
    - CS: Program for Assistance in Transitioning the Homeless (PATH), the Get on Track program (GOT), and Early Intervention
    - DSS: Child Protective Services (CPS) and Adult Protective Services (APS)
    - OHCD: inspection staff
- Identify potential use for client lobby and window to obtain general information, drop off paperwork, apply for services or benefits and which agencies should be represented/staffed at window

Recommendations for facility design:

- Dedicated meeting space for agency staff meetings and collaboration with community partners
- Dedicated smaller meeting areas for interviews or family team meetings including Family Assessment and Planning Team (FAPT) meetings
- Dedicated family visitation and interview space that is child-friendly and welcoming
- Floating workstations for other Human Services agency staff including small offices for private phone calls
- Build using principles of trauma-informed design to minimize stress and enhance comfort

Appendix D: Example Training Plan

Example Training Plan		
1.	Goals	*What are the goals of this training? What skills or knowledge should the participants walk away with?*
2.	Participants	*Who should participate in this training? New or existing staff? At what level of the agency or responsible for what tasks? Will the training be offered to all staff, or only certain agencies/programs/teams/positions?*
3.	Instructors	*Who should provide this training? What requirements should this person meet? Are there existing resources that can be leveraged? Is it better to outsource this training to a vendor?*
4.	Capacity	*How will demand for trainings be managed (wait list, first come first served, lottery, prioritization)?*
5.	Format	*What is the best format for this training (in-person classroom, webinar, self-directed, group, etc.)? Are multiple methods necessary?*
6.	Level	*What is the appropriate level(s) for this training (introductory, advanced)? Is this a one-off training or should there be a sequence with more advanced material (101, 201, etc.)?*
7.	Credits	*Should this training offer CEUs or educational credits towards licensure or professional employment requirements?*
8.	Requirements	*Should this training be mandatory or optional?*
9.	Frequency	*How often should this training be offered (ex. annually, quarterly, monthly)?*
10.	Ownership	*For trainings that are developed internally, where should these trainings "live" so that they can be accessed by all HS staff? Is PWC University the best resource?*
11.	Updates	*How often should the content for this training be reviewed or updated? Who is responsible for the updates?*
12.	Quality	*How will we know if the training is meeting the needs of staff or could be improved?*
13.	Fidelity	*How will we monitor that this training is delivered consistently and that the goals of the training are met? Who is responsible for monitoring ongoing fidelity?*
14.	Funding	*If financial resources are required to support this training, where can funding be leveraged? How much will this training cost per participant or session?*
15.	Partnership	*Are there any state or regional opportunities to engage in these trainings? Can PWC partner with nearby counties or other entities to purchase a training? Are there local university partners that can provide this training?*
16.	Resources	*Are there PWC-specific resources that can be leveraged for this training (PWC University, EAP curriculum, etc.)? Are these resources sufficient or does additional training need to be developed (internally) or purchased?* *(See Appendix E for potential courses from PWC University that can be leveraged and Appendix F for external resources)*

Appendix E: Potential Topics from PWC University

PWC University Course Title	Link to Description	Hours	Recommended Topic from PCG
Working with Difficult People			Managing Challenging Behaviors and De-escalation Techniques
Difficult People: Why They Act That Way and How to Deal with Them	comm_46_a01_bs_enus	0.52	
Difficult People: Can't Change Them, so Change Yourself	comm_46_a02_bs_enus	0.52	
Difficult People: Strategies to Keep Everyone Working Together	comm_46_a03_bs_enus	0.52	
Coping with Aggressive Behavior in the Workplace	_pc_bi_pabi008	0.1	
Blame Backfires--Conquer Negative Thinking	_pc_bi_pfbi003	0.1	
Reacting to Co-workers Who Try Taking Advantage	_pc_ch_pfch003	0.35	
Cross-Cultural Communication			Cultural Competency
How Culture Impacts Communication	comm_48_a01_bs_enus	0.5	
Using Communication Strategies to Bridge Cultural Divides	comm_48_a02_bs_enus	0.5	
Communicating with a Cross-cultural Audience	_pc_bi_pfbi020	0.1	
Dispute Resolution in International Contracts	_pc_ch_lsch005	0.2	
Skills for Communication Success			Managing Challenging Behaviors and De-escalation Techniques
The Art and Science of Communication	acm_07_a01_bs_enus	0.35	
Making an Impact with Non-verbal Communication	acm_07_a02_bs_enus	0.38	
Trust Building through Effective Communication	acm_07_a03_bs_enus	0.42	
Choosing the Right Interpersonal Communication Method to Make Your Point	acm_07_a04_bs_enus	0.5	
Become a Great Listener	acm_07_a05_bs_enus	0.4	
Do We Have a Failure to Communicate?	acm_07_a06_bs_enus	0.43	
Making Yourself Approachable	_pc_bi_pabi011	0.1	
Asserting Yourself in the Workplace	_pc_ch_pach016	0.25	
Developing Your Listening Skills			Managing Challenging Behaviors and De-escalation Techniques
Listening Even When It's Difficult to Listen	acm_14_a01_bs_enus	0.53	
Using Active Listening in Workplace Situations	acm_14_a02_bs_enus	0.57	
Listening to Improve Conversation	_pc_bi_pabi001	0.1	
Effective Listening	_pc_ch_lach030	0.25	
Listening with Skill	_pc_ch_pach002	0.25	
Dealing with Workplace Conflict			Managing Challenging Behaviors and De-escalation Techniques
The Many Approaches to Facing Workplace Conflict	acm_11_a01_bs_enus	0.63	

PWC University Course Title	Link to Description	Hours	Recommended Topic from PCG
Facing and Resolving Conflict in the Workplace	acm_11_a02_bs_enus	0.5	
Confrontation: What's the Best Approach	_pc_bi_mgbi009	0.1	
Personal Conflict Styles	_pc_bi_pabi002	0.1	
Coping with Accusations in the Workplace	_pc_ch_lsch003	0.3	
Managing Conflict	_pc_ch_lach009	0.25	
Conflict: Avoid, Confront, or Delay?	_pc_ch_pach004	0.25	
Meeting the Challenge of Workplace Conflict	_pc_ch_coch001	0.25	
Achieving Emotional Intelligence			Managing Challenging Behaviors and De-escalation Techniques
Navigating Your Own Emotions	acm_13_a01_bs_enus	0.48	
Navigating Other People's Emotions	acm_13_a02_bs_enus	0.42	
Navigating the Workplace with Emotional Intelligence	acm_13_a03_bs_enus	0.43	
How High Is Your EQ?	_pc_bi_pfbi009	0.1	
Emotional Intelligence at Work	_pc_ch_pach014	0.25	
Customer Service Skills			Customer Service
Interacting with Customers	acs_02_a01_bs_enus	0.5	
Communicating Effectively with Customers	acs_02_a02_bs_enus	0.5	
Controlling Conflict, Stress, and Time in a Customer Service Environment	acs_02_a03_bs_enus	0.53	
Dealing with Customer Service Incidents and Complaints	acs_02_a04_bs_enus	0.5	
Polishing Your Skills for Excellent Customer Service	acs_02_a05_bs_enus	0.4	
Listening to Your Customers	_pc_bi_spbi002	0.1	
Creating a Customer-focused Organization	_pc_ch_lach020	0.25	
Developing Your Customer Focus	_pc_ch_pach009	0.25	
Essentials of Customer Service			Customer Service
Rapport Building in Customer Service	acs_03_a01_bs_enus	0.47	
Providing On-site Customer Service	acs_03_a02_bs_enus	0.48	
Providing Telephone Customer Service	acs_03_a03_bs_enus	0.52	
Providing Effective Internal Customer Service	acs_03_a04_bs_enus	0.5	
Facing Confrontation in Customer Service	acs_03_a05_bs_enus	0.45	
Designing a Customer Service Strategy	acs_03_a06_bs_enus	0.47	
Aligning Performance to Key Indicators	_pc_bi_ctbi007	0.1	
The Angry Caller: What's Your Plan?	_pc_bi_spbi016	0.1	

Appendix F: Potential Resources for Recommended Training Topics

Recommended Topic	Potential Resource
Cross-Training on Human Services Programs	DuPage, Kane, and Will Counties in Illinois developed a cross-training for staff who work in child welfare, early childcare and education, and housing and homelessness. https://dupagehomeless.org/wp-content/uploads/2018/05/Working-Together-in-DuPage-Kane-Will-Cross-Training-June-2018.pdf
Executive Functioning and Self-Regulation	PCG has developed customized trainings on executive functioning for multiple human services agencies. For example, the Utah Department of Workforce Services commissioned two videos to use in employment counselor training. https://peerta.acf.hhs.gov/content/executive-functioning-training-videos
The Impact of Trauma and Adverse Childhood Experiences	Fairfax County offers multiple introductory and advanced trainings on the impact of trauma. https://www.fairfaxcounty.gov/neighborhood-community-services/prevention/trauma-informed-community-network
Customer Service	Los Angeles County has developed a Customer Services Information Guide which can provide useful information http://hr.lacounty.gov/wp-content/uploads/2015/09/CustomerServiceGuide20091208.pdf The Mississippi Department of Human Services has an example of customer service training in child welfare: http://www.nrcdr.org/_assets/files/DR-Grantees/year-two/diligent-recruitment-and-retention-grant-customer-service-workshop-facilators-manual.pdf
Managing Challenging Behaviors and De-escalation Techniques	Mental Health First Aid: https://www.mentalhealthfirstaid.org/ Nonviolent Crisis Intervention Training: https://www.crisisprevention.com/Specialties/Nonviolent-Crisis-Intervention
Cultural Competency	The Performance Management Group at Virginia Commonwealth University offers customized trainings on cultural competency. https://pmg.vcu.edu/consulting-services/cultural-competency/ The Multicultural Center at Northern Virginia Family Services may also be a resource for training on this topic. https://www.nvfs.org/about-nvfs/locations/multicultural-center/
Poverty and Services Simulation	The services simulation that PCG provided to PWC HS leadership can be adapted for other participants. Poverty simulations are available through the Missouri Community Action Network. http://www.povertysimulation.net/

Appendix G – Desired Skills and Potential Duties for Call Center Agents

PCG reviewed job descriptions for different kinds of call center agents (including positions within PCG) and compiled lists of frequently sought skills and expected duties. The County should use these lists, along with information from any similar internal positions, to develop the job description for Human Services Information and Referral Call Center agents.

Desired skills for call center agents

- Take and process a high volume of customer service calls in a professional and efficient manner.
- Maintain composure under stress, handling a high volume calls in a demanding environment.
- Multi-task by handling a variety of calls, taking information from caller, entering data into appropriate software systems, and/or dispatching for service.
- Understand a customer's request/question, identify and research the correct response/action to address the issue, and communicate the response to the customer.
- Learn, interpret, and apply administrative and various departmental policies and procedures.
- Maintain accurate record keeping and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate call center equipment including computer equipment and specialized software applications programs.
- Communicate effectively in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Strong organizational skills
- Excellent attention to detail
- Ability to manage time effectively in a fast-paced environment
- Very strong customer service orientation

Potential duties for call center agents

- Receives and evaluates calls from internal and external customers requesting information on county services, procedures, activities, resources, and programs and provides information and assistance in an efficient manner.
- Assesses nature or urgency of the issue; determines and establishes priority of call; resolves the issue or escalates and/or transfers call to appropriate staff as necessary.
- Identifies the type of service being requested by listening, asking relevant questions, evaluating information obtained, and determining county services available to successfully handle the request.
- Creates or researches client information in the appropriate system; records information on all client inquiries or problems; provides updates on previously created cases.
- Conducts research using various county and public resources to provide customers with complete, accurate, and thorough answers to requests for information, inquiries, and/or problems.
- Observes and complies with departmental policies and procedures, customer service quality standards, and compliance guidelines.

- Participates in on-going training and cross-training opportunities; stays abreast of changes in the operation, policies, and procedures of county departments that affect services provided.
- Works with Language Lines service to communicate with non-English speaking callers.
- Initiate and coordinate outbound calls to respond to inquiries, and to follow-up with previous contacts.

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