County of Santa Barbara
Department of Social Services
Client Service & Benefits Branch

Medi-Cal & Food Stamps
Benefits Service Center
Strategy and Plan

October 16, 2007

Revised October 12, 2007

11:59AM

DSS Goals for BSC

Vision

- Embrace e-government technologies and efficient business model processes

Goals

- Provide high-level customer service by providing an immediate connection with an EW during all business hours, offering convenience & bilingual communication, while reducing client visits to Intake centers

- Develop an efficient division & allocation of workload for EWs & Office Support to ensure on time completion of assigned tasks

- Increase personal and team accountability

- Build quality assurance practices into business processes

- Elevate client and employee satisfaction: increase staffing retention, expand pool of applicants, increase employee morale

- Find cost efficiencies and/or cost avoidance: increase business/client growth while maintaining staffing levels

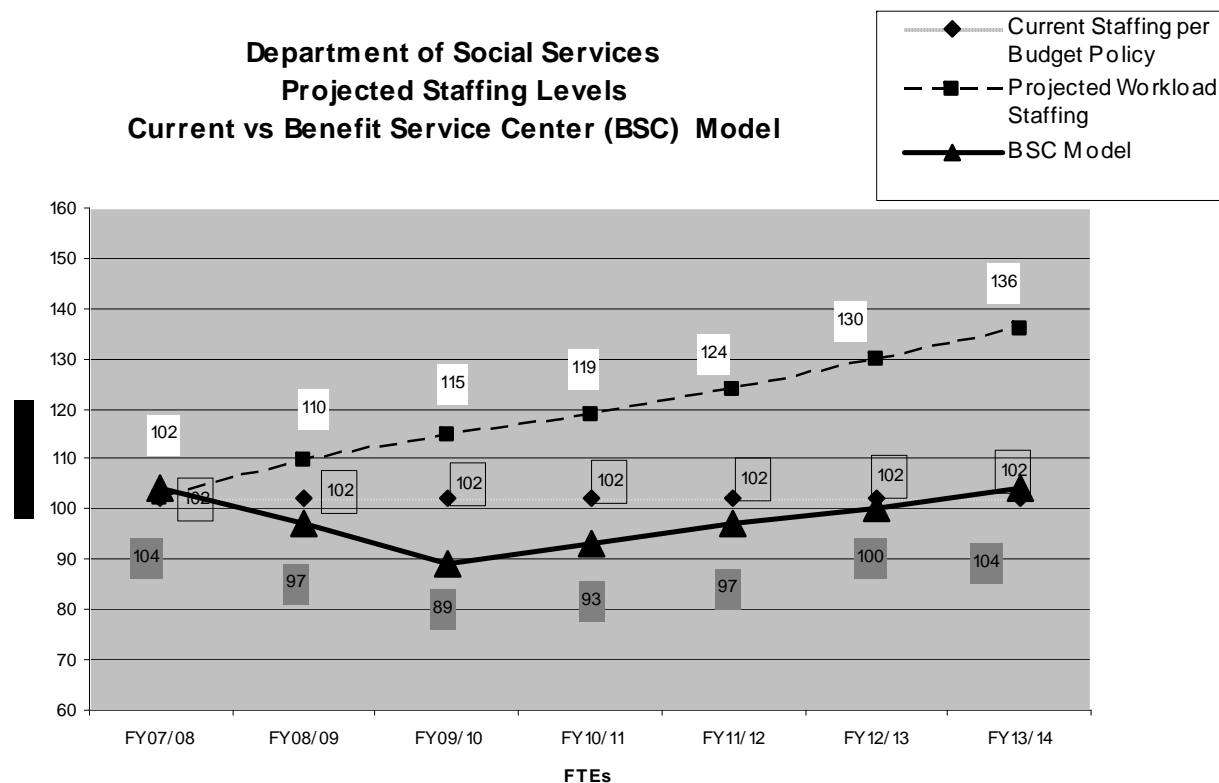- Develop a paperless environment

Strategies

- Leverage technology - automated eligibility system, document imaging and automated telephone systems

- Locate Benefits Service Center where majority of County employees and clients reside (Santa Maria), stabilizing workforce & reducing commute time

- Reduce number of cars/traffic & pollution by employees and clients, support Santa Barbara County's unique environment

- Continue to maintain 3 current offices to take initial applications and provide personal service whenever needed.
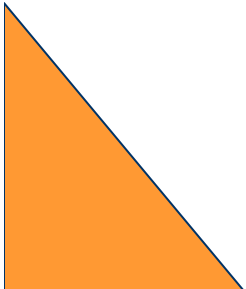
Why a BSC – Why Now

- Consistent with BOS Values
- Manages growth in FTE's
- Negotiated time-limited funding from State

**Department of Social Services
Projected Staffing Levels
Current vs Benefit Service Center (BSC) Model**

Legend:
- Current Staffing per Budget Policy
- Projected Workload Staffing
- BSC Model

Chart values by Fiscal Year:

|	FY07/08	FY08/09	FY09/10	FY10/11	FY11/12	FY12/13	FY13/14
Projected Workload Staffing	102	110	115	119	124	130	136
Current Staffing per Budget Policy	102	102	102	102	102	102	102
BSC Model	104	97	89	93	97	100	104

FTEs

Why a BSC – Why Now

- 70% of potential BSC workforce already reside in Santa Maria and/or Lompoc area
- 95% of Santa Maria workforce is bilingual
- Document Imaging process underway
- Adaptable telecom platform for call routing/service
- Succession planning, leadership development and mentoring program for EWs and Supervisors
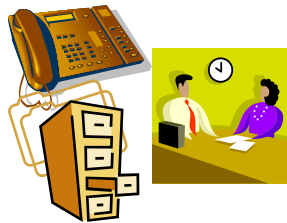- Solid/capable Division Chiefs & Unit Supervisors
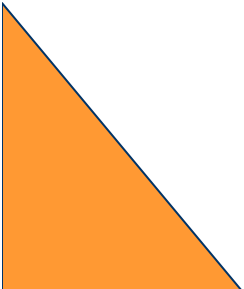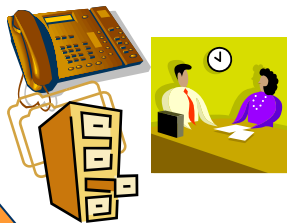
BSC Client Management & Workflow

Current
1 to 1 Relationship
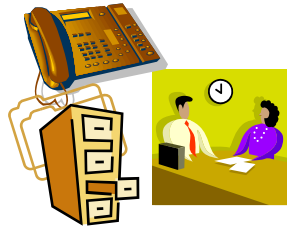
← Client Calls or Mail Response
← Client Appointments
← Case Updates/Management
← Case File Storage
← Clerical support

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New
1 to many relationship

Office Support
Workload Distribution

Phone EW Units
Daily Client Contacts

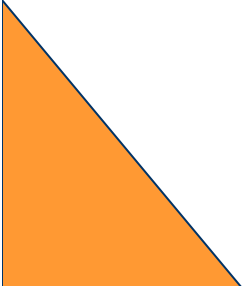Service Center

Case Maintenance Units
Assigned Ongoing Tasks

How Will It Work

Customer Care Worker

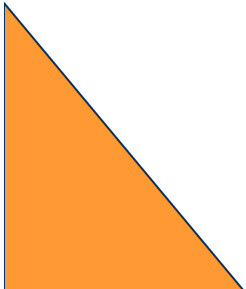Case Maintenance Worker

- **What the "Customer Care Worker" Does –**
  - Will handle all incoming client or service provider calls during BSC business hours, Monday – Friday, in client's preferred language (English or Spanish)
  - No individual caseloads; all case documents are imaged and available electronically
  - The majority of client questions/issues/needs will be completed during the call and all appropriate updates and case comments made in CalWIN system
  - Productivity is maximized by assigning CCEWs basic case maintenance tasks to perform when calls are slow
  - Refers more time consuming transactions to CMEW

- **What the "Case Maintenance Worker" Does –**
  - No individual case loads; accesses case documents electronically
  - Performs assigned case tasks through to completion, contacting client as needed
  - Task distribution closely monitored by BSC Supervisor to ensure prompt response
  - May rotate from CMEW to CCEW
  - Will provide phone back-up support for CCEW group as needed
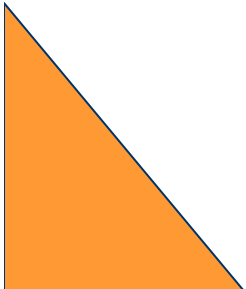
BSC Outcome Measures

| Measurement	Minimum Goal/Threshold	Frequency	Data Source
Project Objectives			
Employee Satisfaction	Average of 4 or better; scale 1-5	6-12 months	Survey
Client Satisfaction	Average of 4 or better; scale 1-5	Quarterly	Survey
Phone Service Levels			
ACD Calls Service Level	Answer 80% of calls Within 20 seconds	Daily/Weekly/ Monthly	Phone System
Call Abandonment Rate	Average 5% or less of total calls abandoned	Daily/Weekly/ Monthly	Phone System
First Call Resolution	TBD	Daily/Weekly/ Monthly	Phone System

BSC Outcome Measures

Measurement	Minimum Goal/Threshold	Frequency	Data Source
State Requirements			
Department of Health Services Medi-Cal Performance Standards	▪90% RRR forms mailed by anniv. date ▪90% RRRs completed within 60 days of receipt ▪90% RRRs not in receipt- NOA sent w/in 45 days	Quarterly/ Annual	Standards performance review
Food Stamp Recertification	Complete 100% within 30 days	Monthly	Task management application; audit
Food Stamp Error Rate	Average <5.5%	Monthly	audit
Quality Assurance			
Call Review	2-3 calls reviewed per CCEW every 80 hours worked	Weekly	Phone System
Case Review	3-4 case reviews per CMEW	Monthly	Task Tool

Example BSC Dashboard

Week of: <date>

Service Center Summary Dashboard

Call Handling	Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Total	Service Level (% within 35 secs)
Medi-Cal English	316	283	327	252	235	**1413**	**89%**
Medi-Cal Spanish	48	47	54	38	20	**207**	**90%**
Service Provider	54	62	50	43	43	**252**	**85%**
Food Stamp English	128	123	136	113	100	**600**	**75%**
Food Stamp Spanish	15	8	13	12	8	**56**	**89%**
Total Calls Answered	**561**	**523**	**580**	**458**	**406**	**2528**	
Average Speed of Answer (ASA)	:35	:35	:35	:35	:35	**:35**	
Max Answer Delay	20:59	21:16	11:59	14:40	13:31	**21:16**	
Median Answer Delay	8:44	9:13	4:49	3:59	6:12	**6:41**	
Abandoned Calls	101	141	47	55	63	**407**	
Abandoned %	**2%**	**5%**	**3%**	**6%**	**7%**	**4%**	
Service Level (% answered w/in 35 seconds)	**88%**	**75%**	**89%**	**86%**	**81%**	**85%**	
Staff Hours Scheduled							
Staff Hours Worked							
Logged in Hours							

Task Management	Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Average
Tasks Assigned	500	450	345	564	432	**458**
Tasks Completed	456	765	765	300	300	**517**
Average Aging (days)	1	3	4	2	1	**2**
Tasks Unassigned	128	123	136	113	100	**120**

Example BSC Dashboard

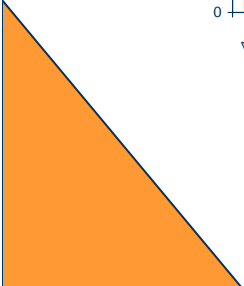## Year to Date Dashboard Summary

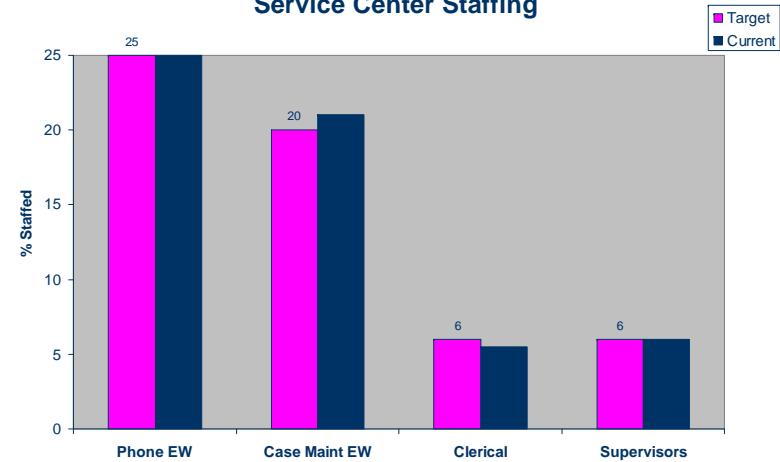Call Volume Forecast to Actual
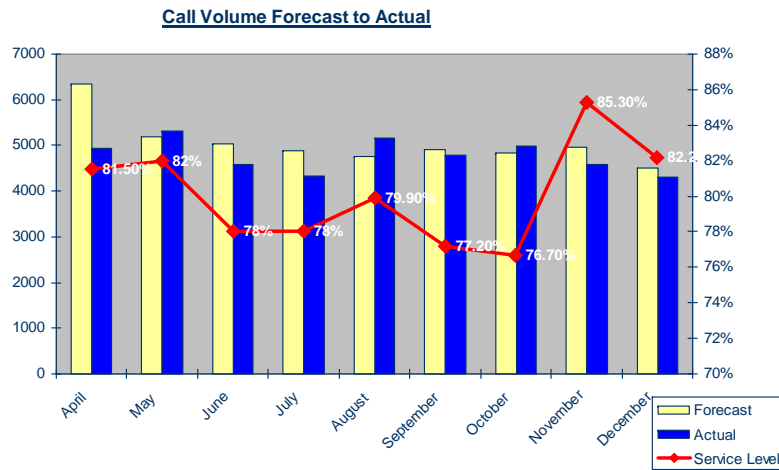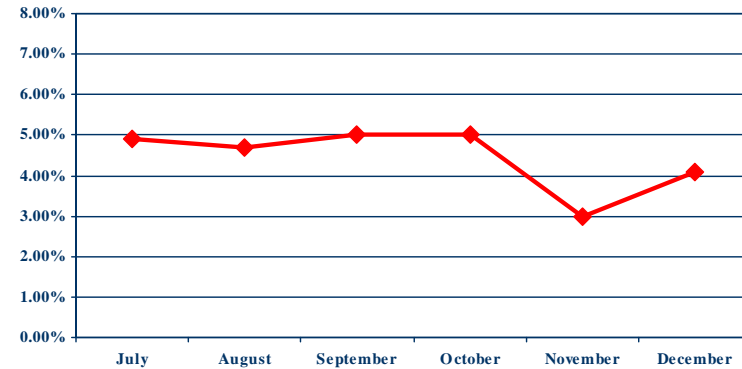
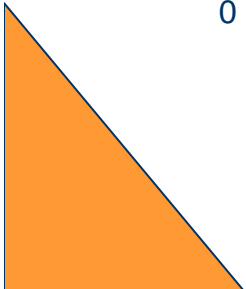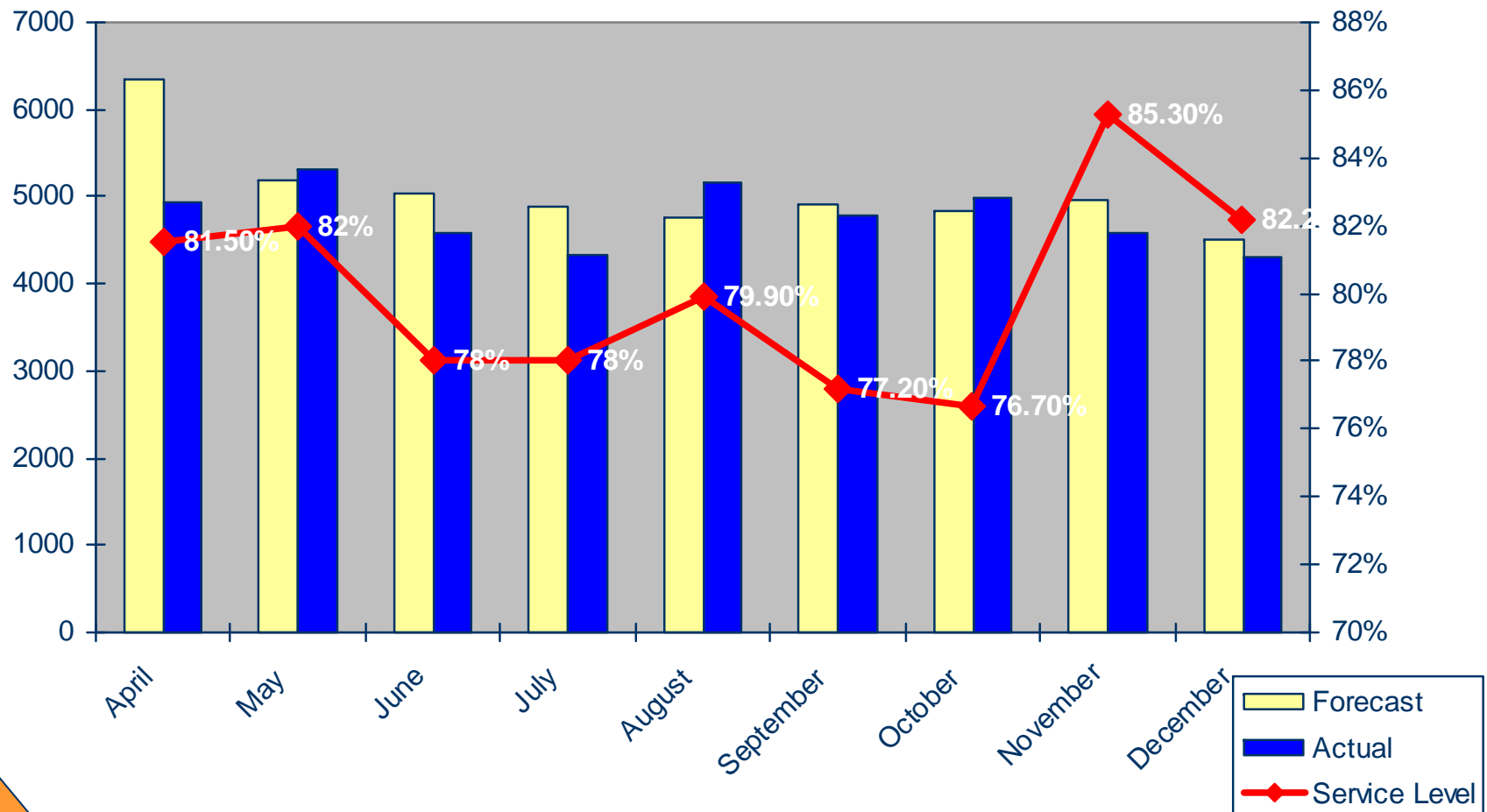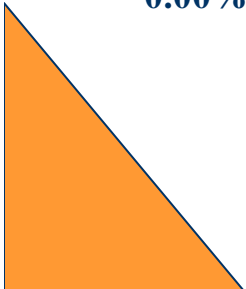Abandonment Rate

Service Level by Skillset
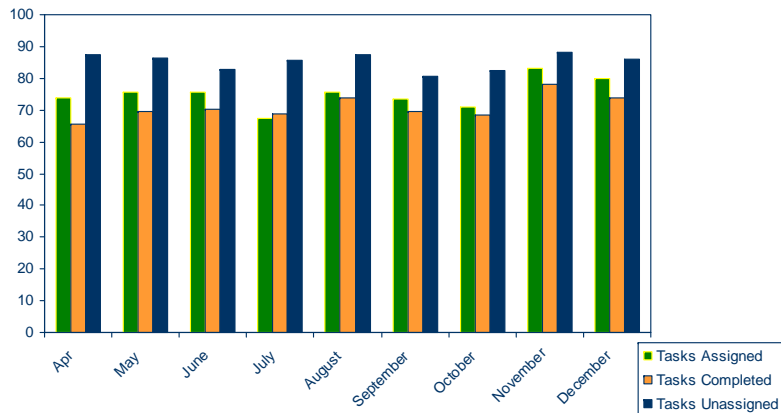
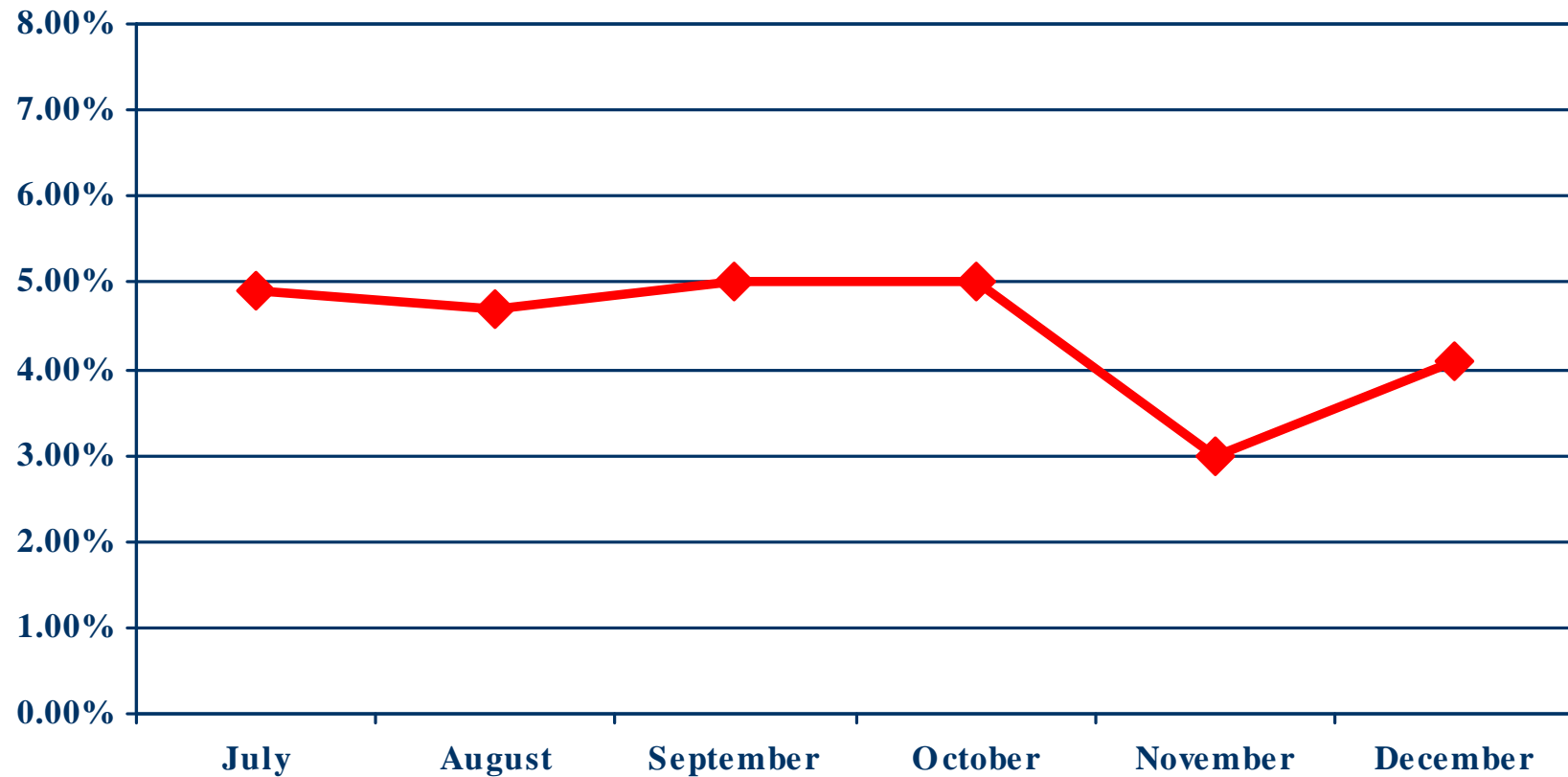
Service Center Staffing

Example BSC Dashboard

Year to Date Dashboard Summary
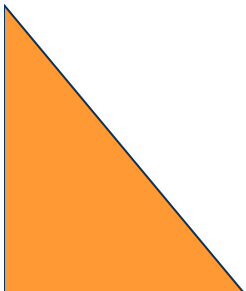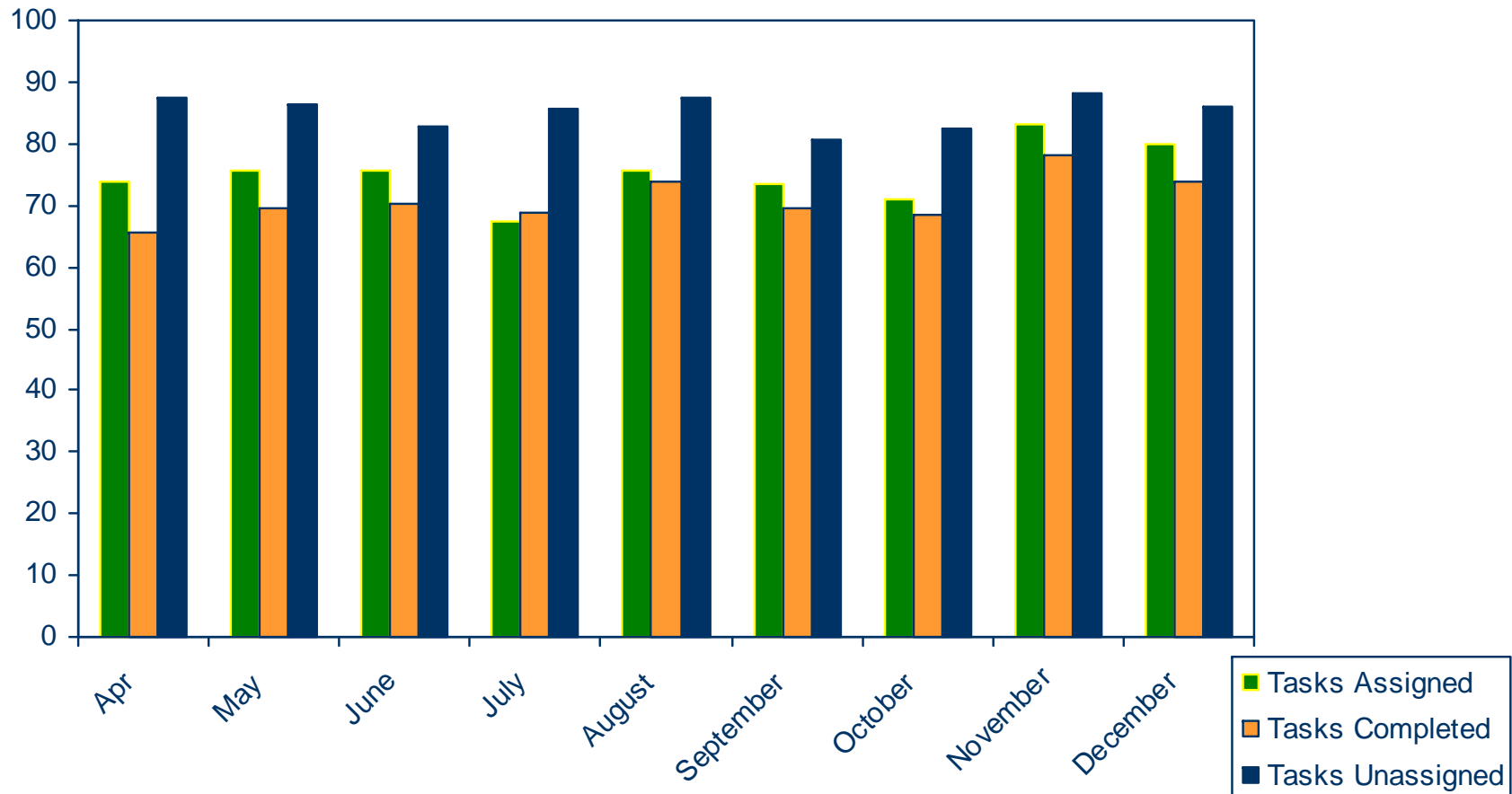
Call Volume Forecast to Actual

Example BSC Dashboard

Abandonment Rate

Example BSC Dashboard

Service Level by Skillset

Legend:
- Tasks Assigned (green)
- Tasks Completed (orange)
- Tasks Unassigned (dark blue)
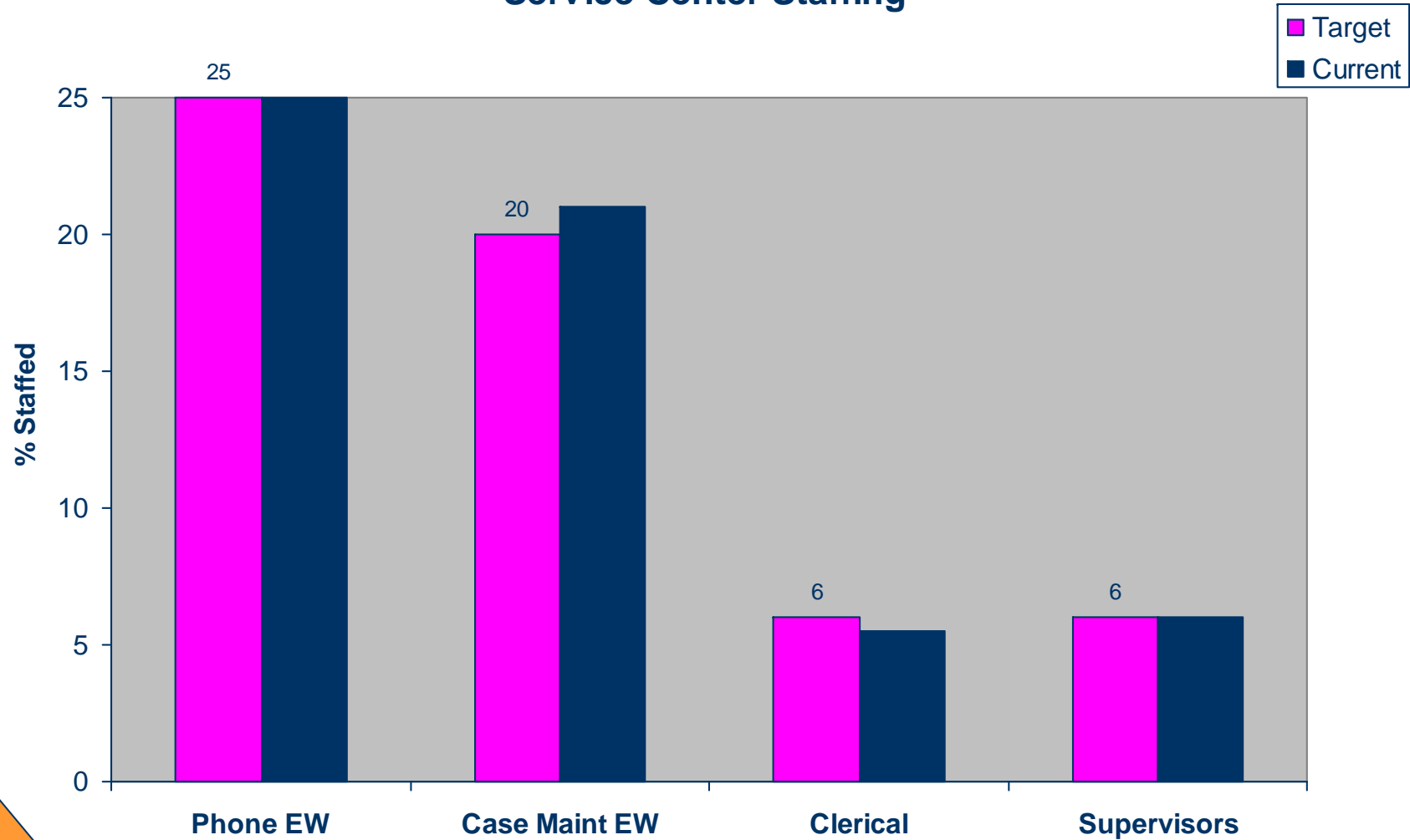
Example BSC Dashboard

Service Center Staffing
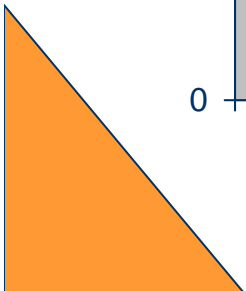
BSC Design and Implementation Timeline

Service Center Strategy & Plan

Phase II RFP Process

Imaging Launch
➤June '08

Document Imaging Process

Service Center Launch
➤Nov '07 – Oct '08

---Minimum 2 Months---

Benefits Service Center Design & Implement

Service Center Training

BSC Technology Implemented

Facility Build Out

BSC Ramped Productivity & Ongoing Operations ➤Oct '08 – Ongoing

Tested, Revised and Improved Processes

Quality Review Process Launch

Transfer of Knowledge/ Service Center Expertise

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