

San Francisco County's Human Services Agency Innovation Office: Meeting Clients' and Employees' Needs Through Remote Resources

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EXECUTIVE SUMMARY

The Innovation Office is an internal consultancy within San Francisco's Human Service Agency that works with staff and customers to improve service delivery experiences and outcomes. Some of their successes include reductions in wait times on phone calls and lobby visits. They have implemented texting client appointment reminders, the standardization of work processes across units, and improved signage and lobby navigation. They have also led user experience research to redesign the agency's website and intranet. This has cultivated a network of innovators across the agency.

Monterey County lists a commitment to practicing continuing innovation as one of its core values and the Department of Social Services could benefit

by adding an innovation unit dedicated to tackling the issues that frustrate frontline staff and customers in their various branches of service. The model of meeting the needs of the public and employees incorporates people, processes, communications, and technology as part of the solution, with a focus on client's needs (functional versus emotional), front line employee's needs (functional versus emotional), problems and root causes, assumptions, success metrics, how many and more did we do, how is anyone better off, data, and stake holders. These were some of the areas that are focused on which were effective in San Francisco County and can be in Monterey County as well.

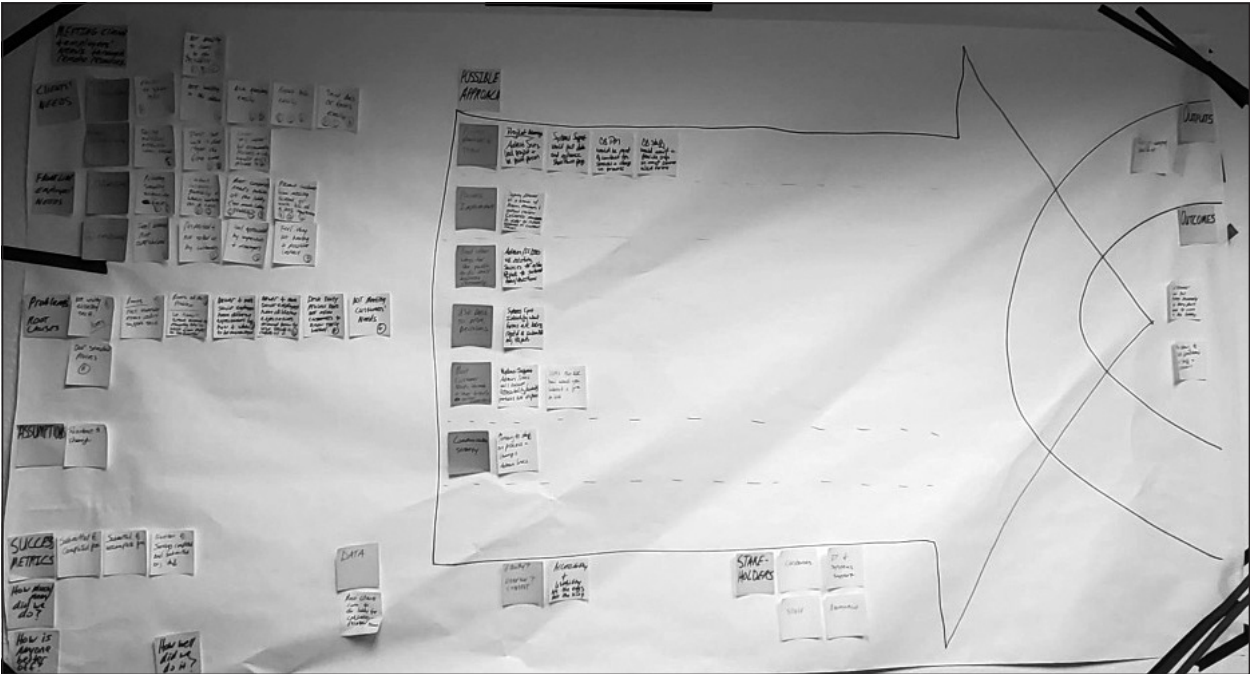
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Marc Hébert, San Francisco County's Human Services Agency's Director of the Innovation Office, envisioned an innovative approach to empower staff and customers' experience with a service delivery method to drive program outcomes. In January 2014, with the mission of improving clients and employees' experiences, the Innovation Office concept was created. Their approach starts with understanding the problem and needs of employees, clients, and community partners, and working with them to co-create solutions. They function as an internal consultancy helping their 'clients' design better services and systems. They focus on co-creating better experiences with the public and employees across digital and nondigital touch points.

From this work group they created a forum on Tumblr, now moved to Medium, that provides access to staff, customers, and anyone else who is interested in following their processes and ideas. The HSA Innovation Office is within the portfolio of work overseen by the agency's Deputy Director of Policy and Planning. The HSA Innovation Office is comprised of four employees. They utilize a large conference room to brainstorm and write their ideas within multiple white boards in the room. They use large pieces of white paper to write down some of the ideas and share with visitors while teaching them new ideas and ways to work within their own county. A sample board is below for reference.



Impact on Monterey County

Monterey County is a medium-sized county, in which the Department of Social Services has over eight hundred staff positions. The department has a training unit assigned to each Program Branch: Aging and Adult Services, Cal Works Employment Services, Community Benefits, Family & Children Services, and Human Resources. An innovation office can work with each branch to identify areas where service delivery can be improved. The innovative office recommends starting with issues that are real pain-points for staff and customers so that they do not feel like working on the solution is just another ‘thing’ they have to do but are truly invested in the outcome. The Innovation Office also recommends not starting with training, but rather co-creating a shared understanding of the problem, exploring possible solutions, prototyping, testing and measuring the change, and leaving room for continuous improvement after the change is made.

In Monterey County’s largest branch nearly 450 employees serve 47,080 CalFresh, 10,356 CalWORKS, and 181,132 Medi-Cal customers. The eligibility and clerical staff are first-line individuals who are dedicated to ensuring customer needs are met, while providing excellent customer service. First steps would be to determine how the department can meet the needs of both the front-line staff and customers. This can be completed by determining what is the emotional versus the functional need of both groups, what is the root cause of the current issues, what are the assumptions one can expect, how can success be measured, what possible approaches can the department take, and, most importantly, identifying the stake holders. An example of this is gaining the trust of a customer to mail, fax, or email a document versus having to hand-deliver it to the worker or receptionist. Meeting the emotional trust of the customer is as important as meeting their functional need. If you do not meet the emotional need you will never have their trust and they will need to use other means of communication. They will always want to walk into the office even if it means waiting for hours to be seen. Promoting and empowering both

staff and customers to feel both their emotional and functional needs are being met and heard will allow the department to move forward in utilizing other means of communicating.

Due to the workforce size and vacancies at any given time, new staff are typically hired throughout the year and are assigned throughout the department. Training of new Eligibility Specialist staff consists of the new staff member in a classroom environment and paired with an assigned mentor or experienced staff trainer. The newly hired clerical support is not part of the training unit, but they are paired with an assigned lead worker for the area and unit they are assigned to. The Eligibility Specialists for the first three months are in a classroom setting and after two to three months, they transition into a unit for assignments. In addition, the new staff participate in the regulation training and learn how to maneuver in the California Statewide Automated Welfare System (SAWS). Creating an Innovative Learning Lab in Monterey County would greatly benefit the training program, as new workers would have the opportunity to develop necessary skills while gaining confidence and experienced workers could refine the necessary techniques to create a safe learning environment. Monterey County already has the training space available for an Innovative Learning Lab located at the 713 La Guardia facility. By implementing new and remote resources staff would be able to utilize Skype, Zoom, Facebook Live and other methods of communication. This would allow staff to be at their designated offices and not have to travel to attend work groups or meetings. Staff would feel empowered to share their ideas, suggestions, and recommendations to move our department forward in the new era of communication by utilizing social media and other resources of communication.

The La Guardia training site has multiple computer labs that could be used for staff to create and test sites for customers to use. This would allow the department’s new employees as well as ongoing employees to use their skills in other areas. This would also allow Monterey County to utilize the “Grow Your Own” methodology and prepare

employees for promotional growth. The county could utilize the classroom setting to stream videos and meetings and create new main pages for our sites. This would allow it to simulate and test before information is shared with customers and the public. The agency could create a simulation lab that includes audio and visual monitors and workstations for staff to use. Once these options are tested and approved, the agency could share these sites for customers to utilize. It can create a section on the main page for customers to send an online message to their case worker and a section for customers to print the common requested forms. This would alleviate some of the phone calls to the worker and the drop-in office visit.

Recommendations for Monterey County

Due to space at the training center in La Guardia and with the implementation of wall monitors being installed at every building, there would be no additional cost for Innovative Learning Lab space. There would be a minimal one-time cost for props to make the audio scenario realistic, such as the microphones, speakers, and possibly the utilization of a smart board monitor. The challenge in creating an Innovative Learning Lab would be in the training component, specifically the training staff needed to facilitate the learning process in order to strengthen the department's training program and meet individual training needs. This will also impact the Systems Support area as they would need to provide staff to assist in the audio and visual components. As with any new process and procedure, staff may encounter some resistance to change from staff and some of their customers; however, there will be some staff and customers who will be very receptive to new changes. A work group is recommended which could be comprised of a Training Supervisor, two Systems Support staff, a Senior Disc and a Business Technology Analyst (BTA), one Administrative Facility Manager, a Fiscal Manager, a CB Program Manager, an Analyst from FCS, an Analyst from Aging & Adult Services, an Analyst from CWES,

and an Analyst from HR to get the program started. This would allow all the department branches to share input on what is needed for their webpages. Once the program is started, it could be shared with staff and volunteers could be added to the group. The fiscal impact of this recommendation would be the cost of the smart boards and audio systems for an additional one-time cost of approximately \$60,000 to equip every building with at least one smart monitor audio and visual system. Due to budget limitations within the department for the foreseeable future, this recommendation is a mid-term vision.

The fiscal implications for this recommendation would most likely have a minimal impact, and initial planning and development could begin fiscal year 2019–2020. Another consideration in developing the Innovative Learning Lab would be the initiating discussions regarding employees' current workloads and seeking volunteers for the implementation of the program. The agency would also have to add these sites to the One-Stop locations so customers can utilize these sites. This would allow the One-Stop customers to send their worker an automated message while they are in a training. By the customers accessing the site they would be able to print the forms and submit them to the receptionist while onsite. In implementing a different methodology of communication, customers would not have to take time off work or miss a class to communicate with their workers.

Conclusion

Through learning about San Francisco's HSA Innovation Office, Monterey County can create an Innovation Learning Lab Office setup unique to the Department of Social Services. This would be a valuable learning tool to equip all staff with the practical skills necessary to be innovative, suggest, and recommend new ideas and solutions, while providing high quality service to our customers and the community. This would allow the department to move forward with new means of communication and move into a new era of technology.

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