

We Care: Moving Social Services Agencies through Change

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EXECUTIVE SUMMARY

The ability government to be responsive to the needs of the public in an evolving society poses many challenges as constraints in policy and administration influence service delivery. These public agencies organization charged with providing services must also evolve in their practices to appeal to dynamics that emerge while meeting their missions. The Affordable Care Act (ACA) has been a monumental change for social services agencies as it has had a profound impact on customer service. Santa Cruz County Human Services Departments responded to this health care reform by creating an enhanced customer service model design that would assist in driving their organizational culture and operations forward. This model known as We Care has transformed daily operations and improved customer service both internally and externally by adopting the concept '*customer experience*'.

This case study seeks to gain insights into potential solutions for Alameda County Social Services Agency through observations of best practices of Santa Cruz County's Human Service Department's We CARE model as it has been integral in transforming their organizational culture and championing leadership through organizational changes and keeping a customer first methodology.

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Introduction

The inception of Affordable Care Act (ACA), January 1, 2014, has left social services agencies across the country in unprecedented and unfamiliar territory. Many questions and concerns surfaced as the implications from an operational framework, staffing impact, and policy administration would challenge the current structure of public assistance programs. Unlike welfare reform in 1997 that included limitations, such as family caps and time-limits, served as catalysts to promote self-sufficiency and increase employability for the Aid to Families with Dependent Children (AFDC) program, ACA's intent was to expand the eligible customer base and provide universal healthcare to all citizens. Of the bevy of possible outcomes resulting from ACA, the influx in applicants for the new health care model would prove to be very challenging for public agencies as uninsured customers would be interacting with social services agencies for the first time. The ACA eligibility and applicant pool would have a profound impact on other public assistance programs (e.g., CalWORKs, Cal Fresh, and General Assistance) as the delivery of services, collaboration with community partners, and the operational framework of social services agencies would need to adjust to meet the needs of the public.

This exponential growth of individuals and families seeking healthcare services had a profound impact on administration of public assistance programs. As ACA challenged the effectiveness and efficiency of current service delivery models, agencies had to evaluate their capacities in order to meet the new health care model's impact. Some immediate gaps were staffing deficiencies as eligibility staff experienced higher than usual caseloads. Current policy and

procedures appeared too rigid and obsolete to support a dynamic ACA. Eligibility systems and technologies were debunked and were no longer sufficient. And, most importantly, customer service processes were deficient as organizations were unable to consistently meet program processing timeframes and responsiveness to inquiries as well as address concerns for newly uninformed customers who were unfamiliar with navigating the social welfare systems. These challenges prompted necessary organizational changes that were vital for customers and social service agents.

As Alameda County looks to meet the constant growing needs of the community, this case study explores Santa Cruz County's solution to meet emerging challenges as a result of ACA and the We Care model. It may help offer some insights, and possibly build upon ideas and concepts, that Alameda County Social Services has pursued during a period of organizational change.

Background

In 2015 Santa Cruz County Human Services Department (HSD), Employment and Benefits Services Departments (EBSD) unveiled a comprehensive, customer-oriented model to address some critical operational needs that would support the organization in combatting challenges as it transitioned through the implementation of ACA and beyond. The We Care concept began in 2013 taking approximately two years to implement and roll out to staff and customers seeking services. Borrowing private sector values from renowned organizations, such as Apple, Starbucks, Ritz Carlton, and Zappos, Santa Cruz HSD adopted the same holistic approach in the development of this model and infused it in their operational framework. These values were central to effective service delivery the organization aimed to embody which placed greater emphasis on the customer experience as opposed to customer service. The distinction between

the two is essential to understanding the elements of this model as its purpose lies in the reshaping of the organization's culture.

The objective of WE Care is to provide service excellence at the initial connection between the customer and the organization where the professional standard is maintained throughout every interaction with the agency (by phone or in person). The We Care approach is reinforced with material provided to staff known as Benefit Representatives. The branding of We Care is comprised of a staff guide, a desk reference, and a series of training videos. The model serves as a blueprint that focuses on the emotional and intellectual

Stages of WE CARE
Welcome and Personalize Greeting
Engage and Clarify Expectations
Communicate and Gather Information
Address Customer Needs
Review and Resolve Questions and Concerns
End on a Positive Note

connections that are often neglected in bureaucratic systems that are often dominated by system efficiencies and performance measures. Motivational interviewing, building rapport, and demonstrating empathy are some nuggets that contribute to the richness of this model. We Care provides uniformed, streamlined case management methods that enhance customer interactions and build connections that can be applied consistently among staff at all levels of the organization.

The agents of this model are HSD benefits representatives (BR's), a newly re-classified eligibility worker position that allowed for more flexibility in serving the customer as the dynamics of ACA would impact operations. Drove of applicants seeking services resulting in higher caseloads required BR's to be able to meet the needs of all customers seeking all public assistance programs. In addition, a benefits call center was also created to support the volume of customer inquiries, and new technology was deployed to support all the infrastructure modifications. Lastly, in an attempt to enhance the customer experience, Santa Cruz County

unveiled state of the art lobby remodels for their two application centers with the intention of moving away from the “welfare office environment.” The BR’s in the application center provided services to walk-in customers, and the BR’s in the call center supported the ongoing case management and inquiries from the call center.

Operational Framework

The operational framework in the We Care model breaks down the customer experience into four categories (Figure 2). These categories capture the customer experience while intending to simplify the processes but still focusing on the larger picture --- providing services to those in need using a customer-oriented approach. The first category identifies the basic needs of the customers (food, medical, cash aid and work support). The next category describes the type of customers (new or existing) followed by the

Figure 2



interactive venues which allow direct customer contact with staff via in-person, phone, and web access. Lastly, the final category provides the differing determinations of all statuses for all programs --- approved/renew, pending, and deny/discontinued. As a reminder to BR’s, the referral process addresses horizontal integration by connecting customers to additional resources they may be eligible for. We Care is extremely structured in that it provides a script for every type of customer interaction by suppling staff with standardized responses to customer inquiries, and by reinforcing solutions for every customer need regardless of eligibility. This creates the connection between individual needs and additional referrals and resources. This type of

proactive prowess and emboldened approach has changed the culture of eligibility workers for Santa Cruz County and the way customers feel about the HSD.

Government in the 21st Century and the evolution of the service

The biggest challenge government entities face is their ability to be sustainable in environments dominated by technology and information due to budget constraints, conservative tax payer ideology, and traditional administrative practices which can stifle organizational growth. These create barriers for administrators to find innovative solutions to business processes that appeal to a technologically savvy customer base. The population of individuals interacting with social service organizations has evolved from a client perspective focused on organizations being experts and policy drivers and clients being dependents or followers complying with the rules and regulations. Customers were seen as service seekers and the organization focused on accountability, operating as business so to speak. The optimal approach for today would be from the perspective of serving citizens as engaged government entities pursuing their own self-interest as ideal service delivery which should be as much about fairness and respect as about accountability and regulatory.

A customer service approach is still a dominant practice in most social services settings, and although it meets the direct needs of customers, it is still lacking in large part to the notion of choice. A customer service orientation is focused on free-choice, choosing one product over another. In social service, choice has different meaning than in business. “In government customers often face long lines, busy signals, inadequate information, and indifferent employees... generally, in government there are few if any alternatives...” (Denhardt & Denhardt, 2011, p.60). Ultimately customers receive their services, but they endure a myriad of

obstacles in the process. Since there are no alternatives to CalWORKs, Medi-Cal and ACA, and Cal Fresh, the customer is often served at the discretion of the organization.

Customer service versus customer experience

This Santa Cruz EBSD identified these gaps in their customer service approach and identified some possibilities to help transform this orientation between the public and the organization in a progressive manner. Andrew Stewart, Staff Development Program Manager for Santa Cruz County Human Services Department (HSD), shared his ideas on the genesis for We Care, stating the only way for organizations to evolve is by “winning the hearts and minds of the customer”. The success of reinventing their culture was to first examine the understanding the customer service and experience.

Figure 3

Scenario	Customer Service	Customer Experience
Disc. benefits for Non-compliance w/ semi-annual reporting.	<i>SAR 7's forms available in the lobby. A benefits representative (BR) will process the paper work.</i>	<i>PC/Laptops in the Lobby and the customer's directed to online portal and is assisted with completion of the SAR 7. BR processes paper work in the lobby to expedite benefits.</i>
Renewal Process	<i>County scheduled appointment for the customer.</i>	<i>Customer Selecting appointment of choice to meet with a county representative by phone or in person.</i>
Social Service Lobby	<i>Agency staff answering questions and receiving documents from customers.</i>	<i>Meets with a greeter upon entrance. Document imaging kiosks in the w/r to image documents, Free Wi-Fi, Charging stations. Short wait timer.</i>
Reporting	<i>Number of applicants served in the month; timely processing of applications; number of applicants approved.</i>	<i>Avg. waiting times in lobby/ phone. Number of app. approved the same day, number of unresolved inquires resulting in multiple visits.</i>

To win hearts and minds of the customer, the social service organizations have to shift their approach from merely providing the service to meet an immediate customer need to improving the customer experience. Figure 2 is a representation of the two different approaches and helped Santa Cruz County identify the gaps in its processes that We Care addressed.

Keys to success: Implementation of We Care

To succeed in implementing the We Care model involved adopting a bottom-up decision-making approach. EBSD saw the value in this approach and allowed for all levels of staff in the organization to play a role in the development of this model because it would encourage buy-in from the BR's, and it would assist in supporting the organization's change. A bottom-up approach exemplified a proactive team concept and provided a more collaborative feedback loop to leadership as agency staff was able to interact with different planning committees to help shape what the We Care model would look like.

Key elements:

- Sub-committees formed included BR and department leadership in decision-making
- BRs involved is scripts for We Care desk guides/ reference guide
- BRs were actors in the We Care video
- Training department helped with branding of We Care

Organization Change

Alameda County Social Services Agency (SSA) also faced the difficult challenges in its

previous business model resulting from ACA. The tremendous growth of the population served propelled the agency to assess the effectiveness of its services. Like Santa Cruz EBSD, Alameda County implemented similar systems and technologies to support the administration of its eligibility programs. In August 2015, Alameda County enhanced its operational framework to support service delivery by shifting to a Service Center model. The concept of a Service Center model is to increase flexibility for staff and customers while increasing responsiveness through multiple channels that center on a customer service orientation.

As part of the first phase of the service center model, a customer service call center (CSCC) was created along with staffing the waiting rooms/lobby's with eligibility staff to support walk-in appointments. In doing so, application processing times were increased significantly as eligibility determinations for the public assistance programs are now made on the same day. In April 2017, the second phase of the service center model involved converting from ongoing/district caseloads to a case-action/ task-based model. Case actions are assigned and distributed evenly to eligibility staff. "A warm hand off, so to speak, between agency staff who support their co-workers in our mission is to provide excellent service" (Steward, A., 2017). The previous caseload model, totaling 216,000 cases department-wide, was no longer sustainable and became difficult to individually manage. As a result, a new shared model was implemented.

Challenges

"With each new reform, caseworkers are faced with new rules and may struggle to keep up with policy. Furthermore, caseworkers find themselves in a tough situation because of their contradictory job duties of helping and policing clients" (Taylor, 2014, p. 413). Alameda County SSA anticipated that initial challenges would result from Phase 2 of the service center model.

The initial considerations are that some elements of customer service for both internal and external customers would be challenged.

- Customers without an assigned worker of record.
- Building trust in the new business model for customers and staff.
- Cohesion among staff to support operational change.
- Motivation and morale
- Buy-in trust in a shared caseload model.
- Accountability

Intercounty Comparison

There's much to be learned about changing culture through the success of other organizations by identifying parallels and avoiding their pitfalls. The figure below details the similarities and differences between Santa Cruz and Alameda Counties. Both counties have successfully implemented systems and technologies to support their organizations and enhance service delivery. The gaps by comparison are in the video production capability for Santa Cruz and a customer service model for Alameda County.

Figure 4:

Systems/Technology	Santa Cruz Co.	Alameda Co.
Document Imaging	Fortis	Webfiles
Lobby Management System	Q- Track	Q-Matic

Self-Scanning Kiosk	No	YES
Task Management	Task Tracker	Work Distribution Tool
Video Production	No	E-Studio
Customer Service Model	We CARE	No
Reclassification: Eligibility Series	Benefits Representative	Eligibility Services Technician I-IV

Recommendations

The benefits of adopting a standardized customer service model such as We Care would have a tremendous impact on service delivery in Alameda County SSA and help mitigate challenges that will emerge in a service center model. Incorporating key elements of WE Care will empower staff by raising their consciousness to meet the expectations of today’s customers. As result, customers will feel more welcome, supported, understood and respected. Supporting a culture change with staff buy-in would help to strengthen the business model because staff would see them as an integral part of their roles. In comparing the two counties (see Figure 4), there are a lot of similarities which makes implementation of the We Care model a viable solution. The benefit of implementing a We Care model in Alameda County’s training department would help the county to:

- Develop a standardized customer service model with staff input
- Reinforce customer service model with materials and branding
- Leverage existing technology and resources by using training departments E-Studio for video production
- Incorporate a We Care customer service model in all of its new customer service trainings.

Acknowledgments

I want to thank Santa Cruz County Human Services Department HSD and its executive team: HSD Director, Ellen Timberlake; EBSD Director, Emily Balli, P&E Director, Madeline Noya; HSD Analyst, Juan Magana, for opening your doors and allowing me learn about the great things happening in your county. I would like to send a special thanks to Andrew Stewart, Staff Development Program Manager, and his training team, Brittany Smith and Michael Rosales, for making this a great and invaluable opportunity.

Finally, I would to thank my Agency Director, Lori Cox; Assistant Agency Director for the Department of WBA, Andrea Ford; Division Director of Enterprise Office, Huong Tran; and BASSC Liaison, Larry Sanchez, for giving me the opportunity to participate in the 2016–2017 BASSC Program.

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