



By Barry L. Zimmerman

Leveraging Organizational Strengths to Modernize Service Delivery

The Ventura County Human Services Agency (VCHSA) located in southern California serves one in six of Ventura County's 830,000 residents, up 50 percent since the Great Recession of 2007 that drove many to seek government aid for the first time.

By 2010, it had become clear that if VCHSA was going to keep pace with the growing demand for public assistance programs, the agency needed to carve out precious time and invest scarce resources to modernize its service delivery system. Leadership determined that a series of complex projects would be implemented in a relatively short period of time while ensuring that the organization could manage the scope of the change.

In less than three years, VCHSA revolutionized the way it provides services to its customer base, transitioning to a distributed task-based model that empowers workers to assist a far greater number of clients than possible under the traditional model of each worker carrying a specific caseload. Other changes included reengineering long-standing business processes; implementing a call center equipped to answer inquiries from any client receiving public assistance; and piloting a teleworker program that allows staff to perform approved tasks offsite.

Importantly, the evolution of VCHSA's service delivery model rested on the successful implementation of an electronic case file system, which replaced 88,000 paper case files and enabled staff to access e-cases to serve clients regardless of geography.

In considering VCHSA's efficiency and effectiveness in modernizing



its systems—including winning the “Best Industry Service Innovation Solution” award from Kofax® Limited (a provider of document capture, process management, analytics, and mobile capabilities) for the agency's implementation of the Kofax Capture—Transformation Module to support e-case files—three key organizational strengths stand out.

Leaders with Vision: VCHSA has made an investment in developing leaders who have a deep understanding of the agency's goals and who are able to bridge the perspectives of program experts and technologists. In tackling

With the new paperless system, staff has been able to provide a greater degree of customer service, which is paramount to our clients.

—JUAN CARLOS MORENO, VCHSA
ELIGIBILITY WORKER

the paperless case file project, these leaders understood the importance of partnering with a technology company that championed VCHSA's vision. VCHSA selected Kofax Capture because it was able to support the agency's vision that clients will experience “no wrong door” when seeking assistance at any physical or virtual office location since staff has e-case files at their fingertips. Moreover, Kofax Capture enables staff to conduct more of their work in community settings rather than inside county offices, and has the power to automate routine workflows, freeing up staff for core customer service roles.

This shared understanding of the agency's direction—not just the objectives of one program or division—was essential for designing an electronic case file system that today provides a solid foundation for future enhancement projects.

Collaboration with Central County Government: VCHSA recognizes

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the technical expertise and broad support that central county government provides to the agency, as well as the agency's value in ushering in new systems that can be leveraged throughout county government.

Collaborative working relationships between VCHSA and the County Executive Office, Information Technology Services, and the General Services Agency (GSA) enabled the agency to capitalize on limited-time dollars to fund the agency's electronic case file system, to bring the system to scale in a manner that provides a viable model for countywide use, and to pursue a number of system enhancements. For example, given GSA's expertise in document handling, VCHSA now engages GSA staff to "deliver" 500,000 scanned mail images electronically each month using Kofax Capture, freeing up VCHSA staff for client interaction rather than paper handling.

Culture of Customer Service: While there was concern that VCHSA's new electronic case file system and other automation projects might reduce the agency's meaningful work to a series of robotic steps, leadership challenged

More people needed help yet there were fewer resources to provide it. We wanted to provide a "no wrong door" approach to ease access to benefits for eligible community members.

—PATRICIA E. SANCHEZ, PROJECT MANAGER FOR VCHSA'S ENTERPRISE CONTENT MANAGEMENT SOLUTION

the organization to consider its long-standing value "clients come first."


Is providing quality customer service contingent upon mailing back all original documents to clients, thousands of documents in any given year? Can the agency redirect this time to tasks that clients value more, while returning only the most important originals to clients and assuring clients that scanned images can be pulled from the system upon request?

Staff's strong commitment to clients has delivered answers to dozens of questions such as these, helping modernization become synonymous with improved customer service within the organizational culture.

Since implementing its e-case system in late 2011, VCHSA has achieved payback on the investment and is now realizing a return of some \$900,000

per year in productivity gains, reduced document storage costs, paper-related cost avoidance, and a host of other benefits for clients and staff.

Of equal importance to VCHSA's success in modernizing its service delivery system is the agency's recognition of key organizational strengths that can be leveraged for future projects, big and small, aimed at providing quality customer service while meeting the ever-increasing demand for human services.

To view a video describing VCHSA's transition to a paperless case file system, visit www.ventura.org/human-services-agency/continuous-improvement. 

Barry L. Zimmerman is the director of the Ventura County (CA) Human Services Agency.

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"to galvanize impact investing" (<http://ow.ly/ywvQq>). APHSA participated in community sessions to inform those recommendations.


Of course, the theme of this month's issue of *Policy & Practice* is *The Modern Marketplace*, focused on technology. The role technology is playing (or will play) in each of the above areas is a game-changer. As an enabling tool, technology can help agencies, staff, and consumers be:

- ◆ **Innovators:** finding new ways of doing business. Better, faster, leaner.
- ◆ **Self-servers:** not only in accessing services through a modern marketplace, but also supporting the

executive functioning needed to help families to get a better place (e.g., automated text reminders for appointments).

- ◆ **Monitors:** using predictive analytics to allow early detection of unintentional errors and proactively discover and address cases of fraud.
- ◆ **Connectors:** connecting systems and sectors to each other in ways never seen before aimed at getting the right service at the right time for the right duration, ultimately reducing depending on government services.

As always, this technology issue offers many concrete examples of how technology is making a difference

on the ground. We hope you find the articles helpful in your work. And, please continue to share your stories of innovation, impact, and transformation through our web site (<http://aphsa.org/content/APHSA/en/pathways/innovation-in-action.html>). 



Reference Note

1. All presentations from the Forum are posted on our web site: <http://aphsa.org/content/APHSA/en/resources/PRESENTATIONS/CONFERENCES.html>