DHHS

New Hampshire
Department of Health and Human Services

ACCES: Achieving Community Centered Excellence in Services / Front Door

Project Overview

July 28, 2008
Version 4

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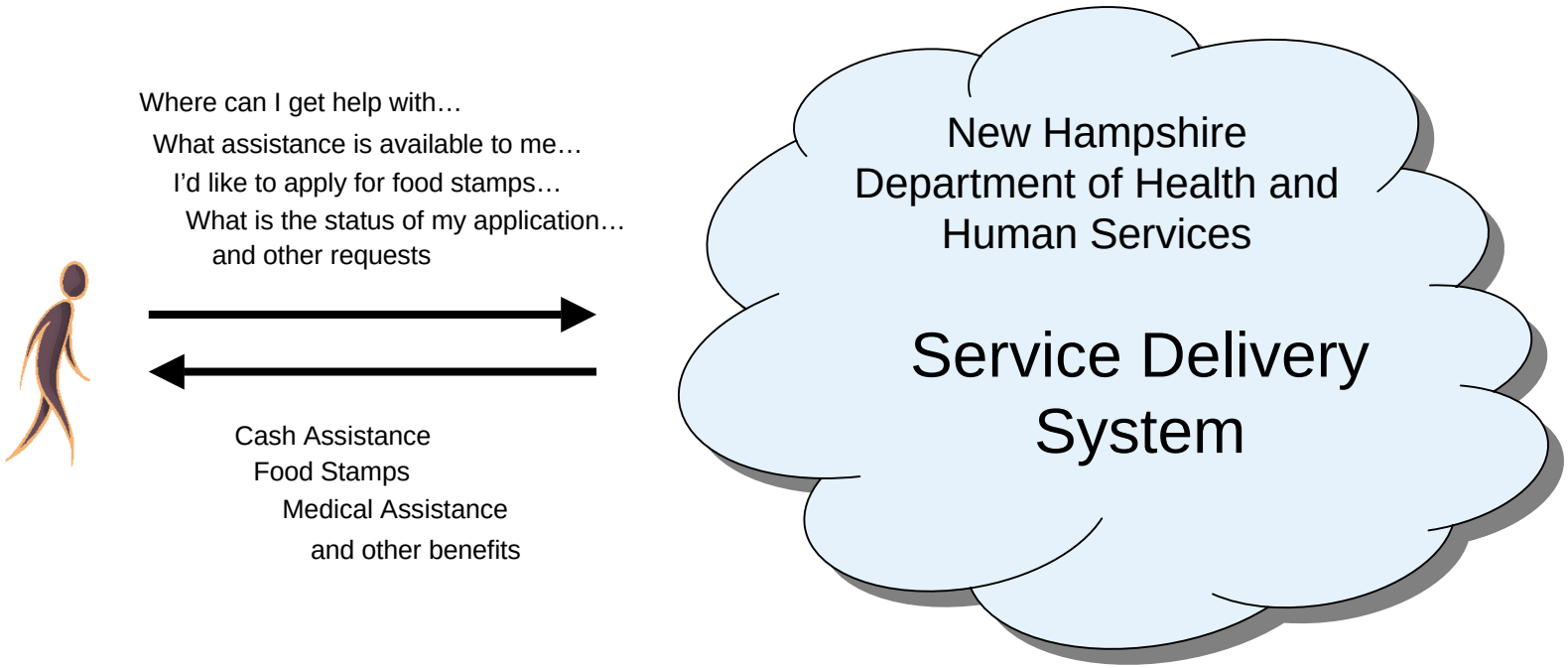
Introduction

New Hampshire Health and Human Services

The New Hampshire Department of Health and Human Services (DHHS) is organized to provide a comprehensive and coordinated system of health and human services as needed to promote and protect the health, safety and well-being of the citizens of New Hampshire. People access services through DHHS's Service Delivery System.

People reach out to the Service Delivery System for general health and human services help and guidance, as well as for specific financial and medical assistance which is offered through the many DHHS programs.



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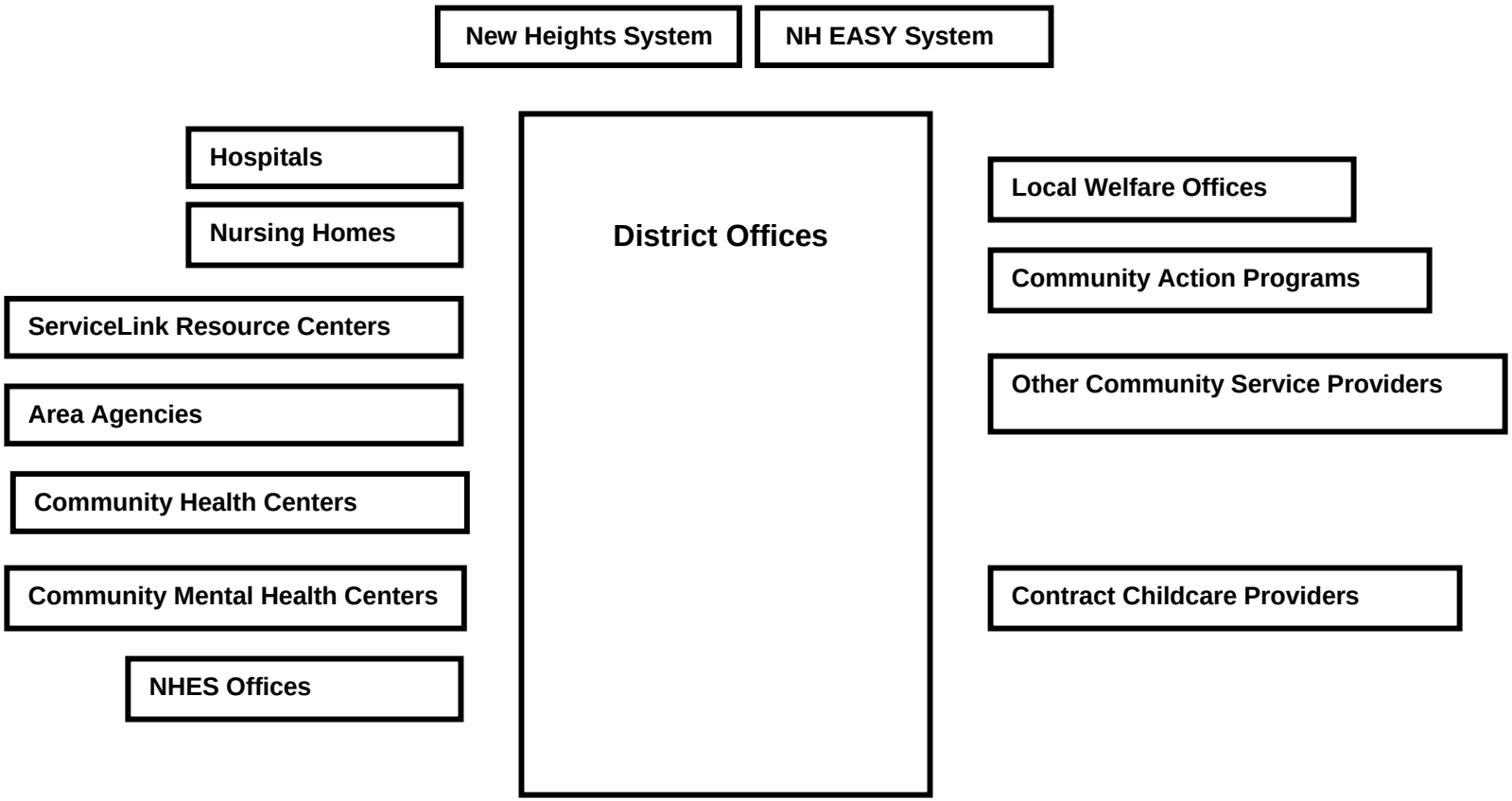
NH DHHS Service Delivery System (SDS) Components

The New Hampshire DHHS Service Delivery System consists a variety of facilities, providers and systems with the District Offices as the core.



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SDS Components: Number of Facilities and Definitions

New Heights System
A large-scale, client/server, interactive eligibility determination and benefit issuance system which automates client application, eligibility and activities.

NH EASY System
NH Electronic Application System. Qualified, trained service providers help individuals apply for benefits via Internet access.

Hospitals - 28
Institutions providing patients diagnostic and therapeutic services for medical treatment, care or rehabilitation.

Nursing Homes - 86
Facilities that provide primarily 24 hr. care for those needing either skilled nursing, rehabilitation services or other health related care.

ServiceLink Resource Centers - 13
One-stop area resource centers for seniors and adults with disabilities and for their families.

Area Agencies - 10
DHHS designated nonprofit corporations providing specialized services and supports to developmentally disabled individuals, individuals with acquired brain disorders, and to their families.

Community Mental Health Centers - 10
DHHS designated nonprofit corporations providing services and supports to individuals with serious mental illness.

Community Health Centers - 14
Nonprofit corporations providing primary care and other medical and health services to uninsured and underinsured individuals.

NHES Offices - 13
An employment support program that helps able-bodied parents become self-sufficient by promoting work through employment support and training services.

District Offices - 13

DHHS community presence. Staff provide help and determine eligibility for a wide array of programs and services.

One office is dedicated to Healthy Kids Program.

Local Welfare Offices - 234
City and town offices that provide general assistance to income eligible individuals and families.

Community Action Programs - 6
Nonprofit organizations that provide an array of services for low-income people.

Other Community Service Providers
Including but not limited to Community Residences, Residential Care Providers, Foster Care Providers, Senior Centers, Food Pantries, Homeless Programs, other assistance programs and other community programs.

Contract Childcare Providers - 28
DHHS licensed childcare providers that are contracted by DHHS to make childcare eligibility determinations.

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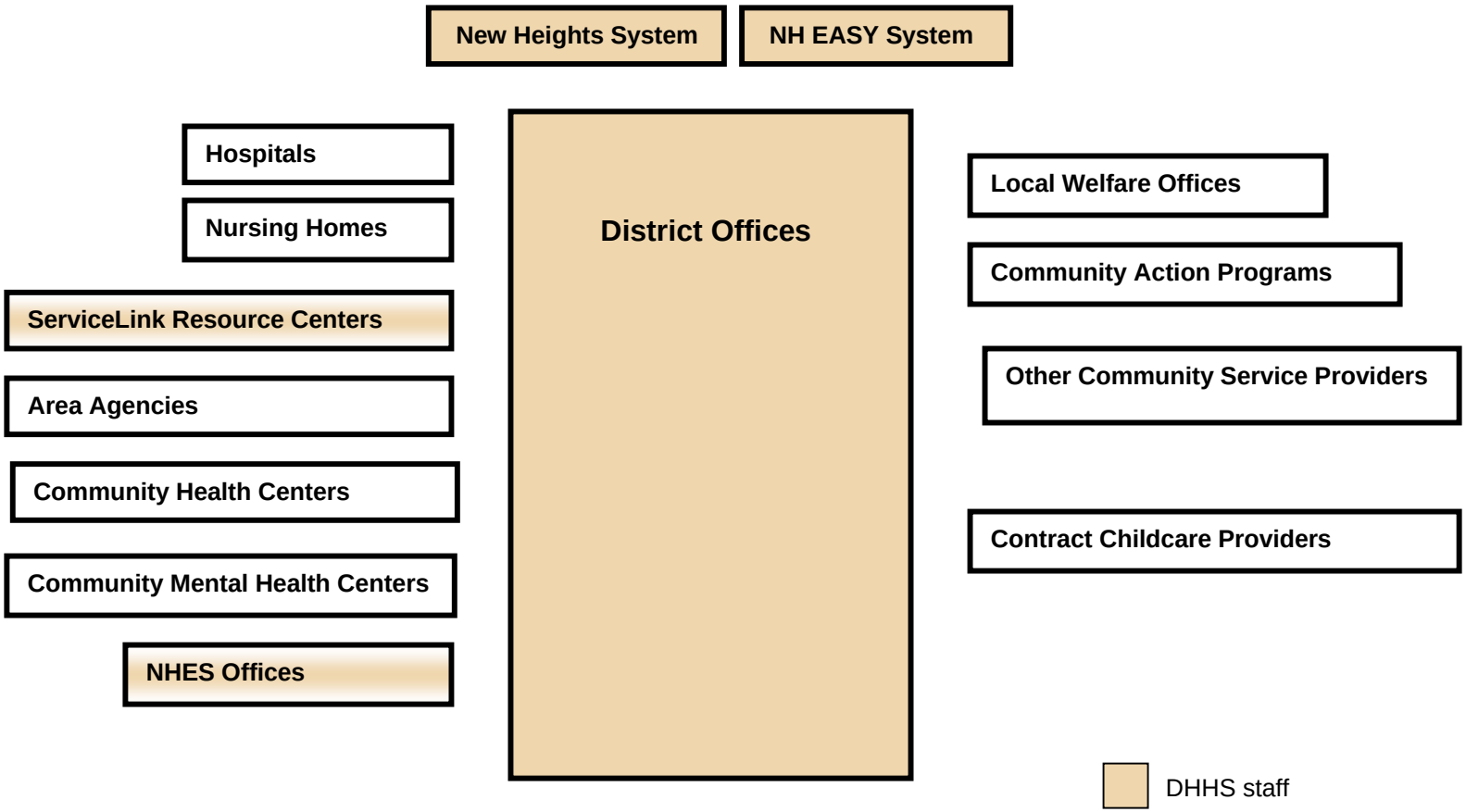
SDS Components: Staffing

The people who comprise the Service Delivery System include both DHHS and non-DHHS staff.



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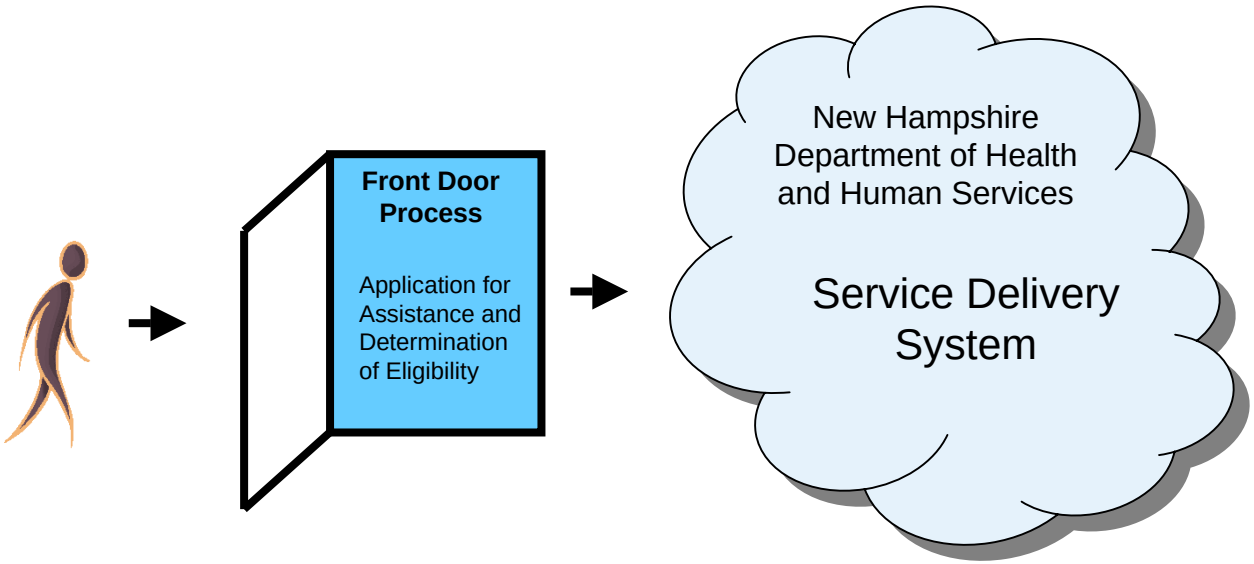
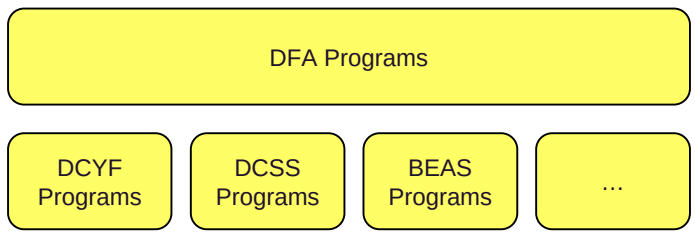
SDS Front Door Process and DHHS Programs

The Front Door process is the “gateway” through which a person enters the Service Delivery System to receive benefits and services via the programs that DHHS offers.

People apply for benefits through the Front Door process and a determination is made as to whether the person is eligible to receive services under one or more of the programs.





Assistance programs are primarily offered through the Division of Family Assistance. People may also seek and receive assistance from programs offered by other program areas.

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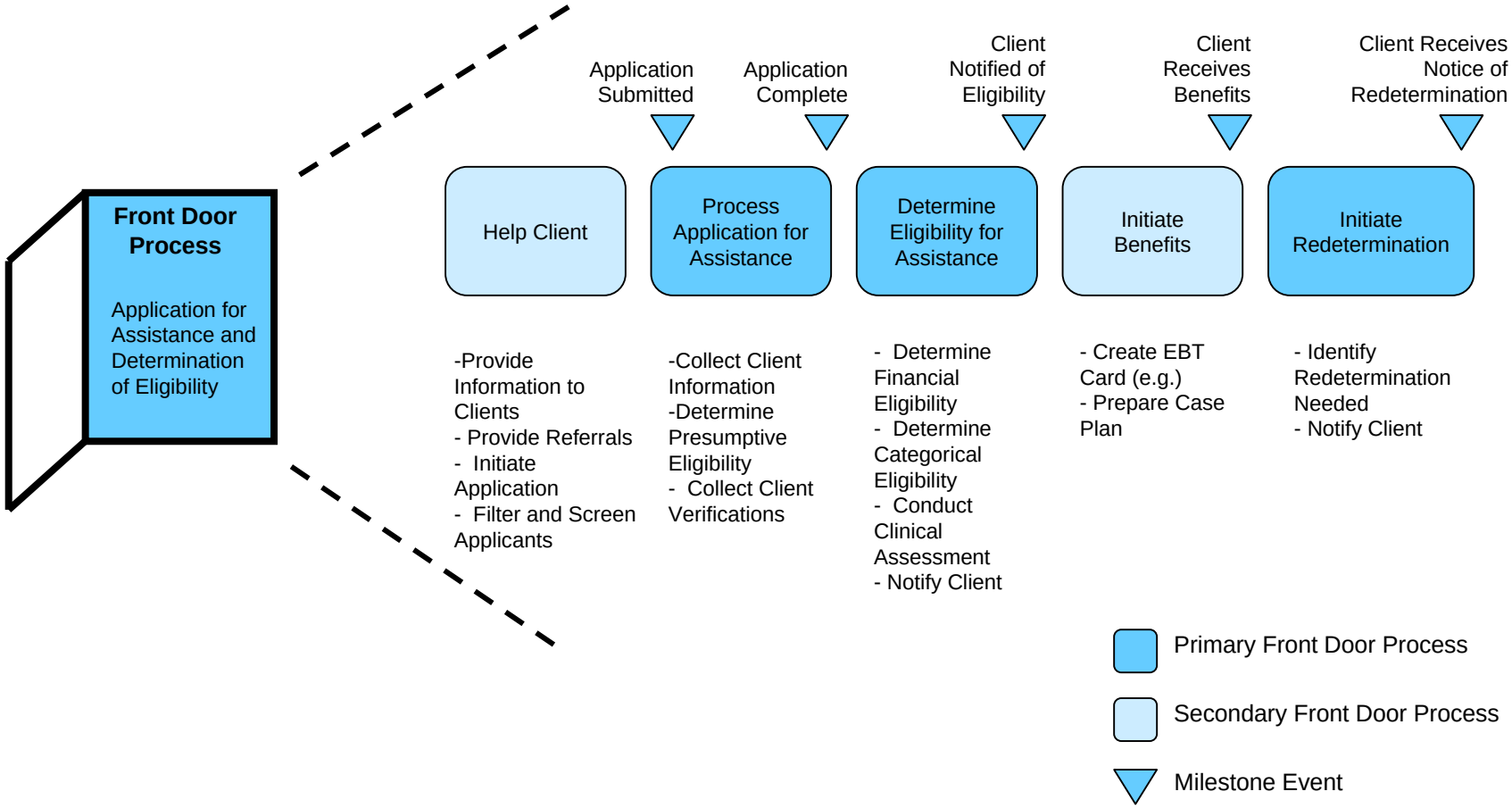
SDS Front Door Sub-Processes

The Front Door process consists of three primary sub-processes that relate to the application for benefits and the determination and redetermination of eligibility. Helping the client and assisting with the initiation of benefits are also part of the Front Door process.

A critical time to manage is from the time the application is submitted until the time the client first receives benefits.



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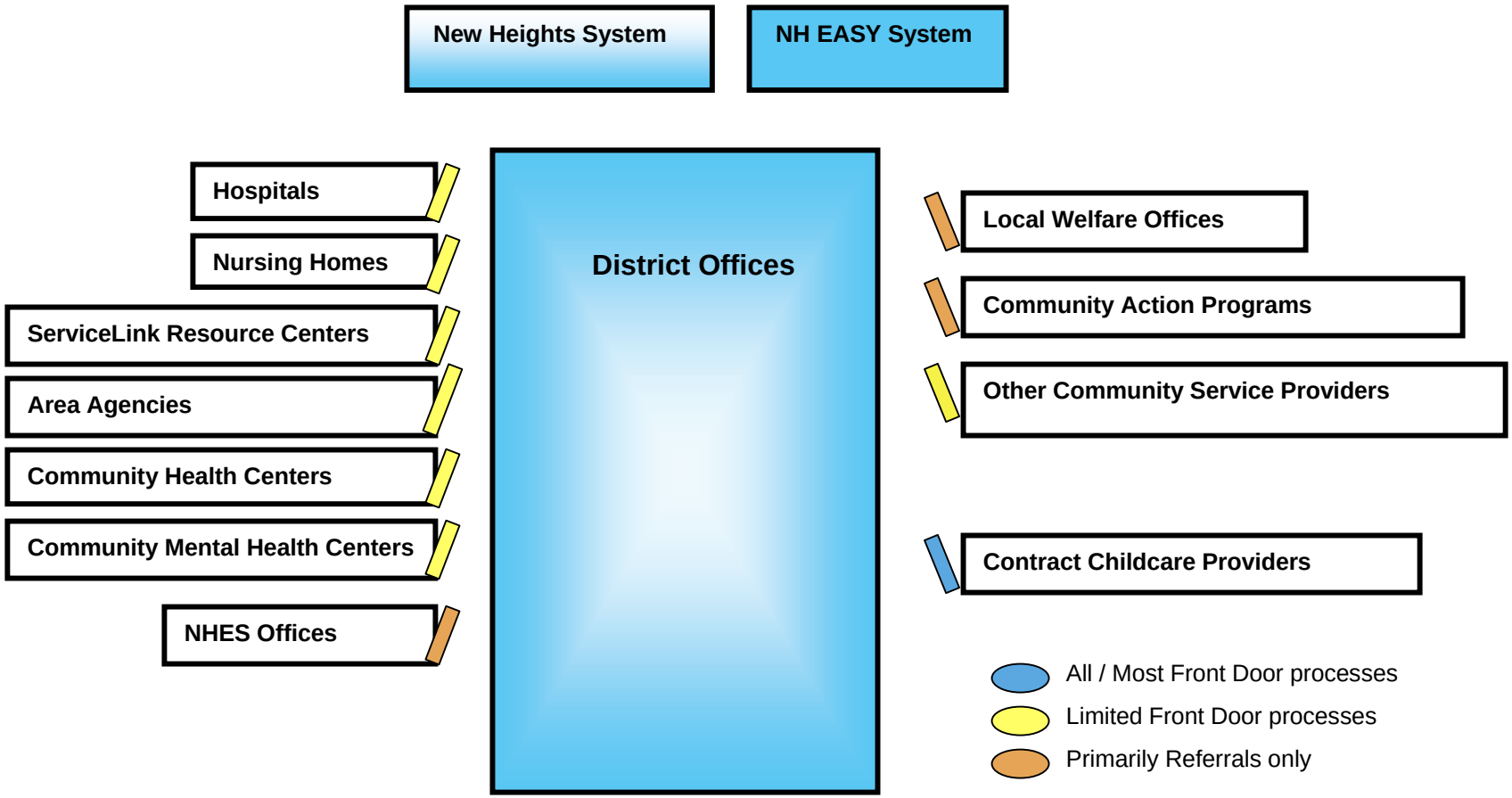
Where the SDS Front Door Process Resides

The Front Door Process can commence with one of a variety of community providers through referral or application. The District Office is an essential component of the Front Door Process.



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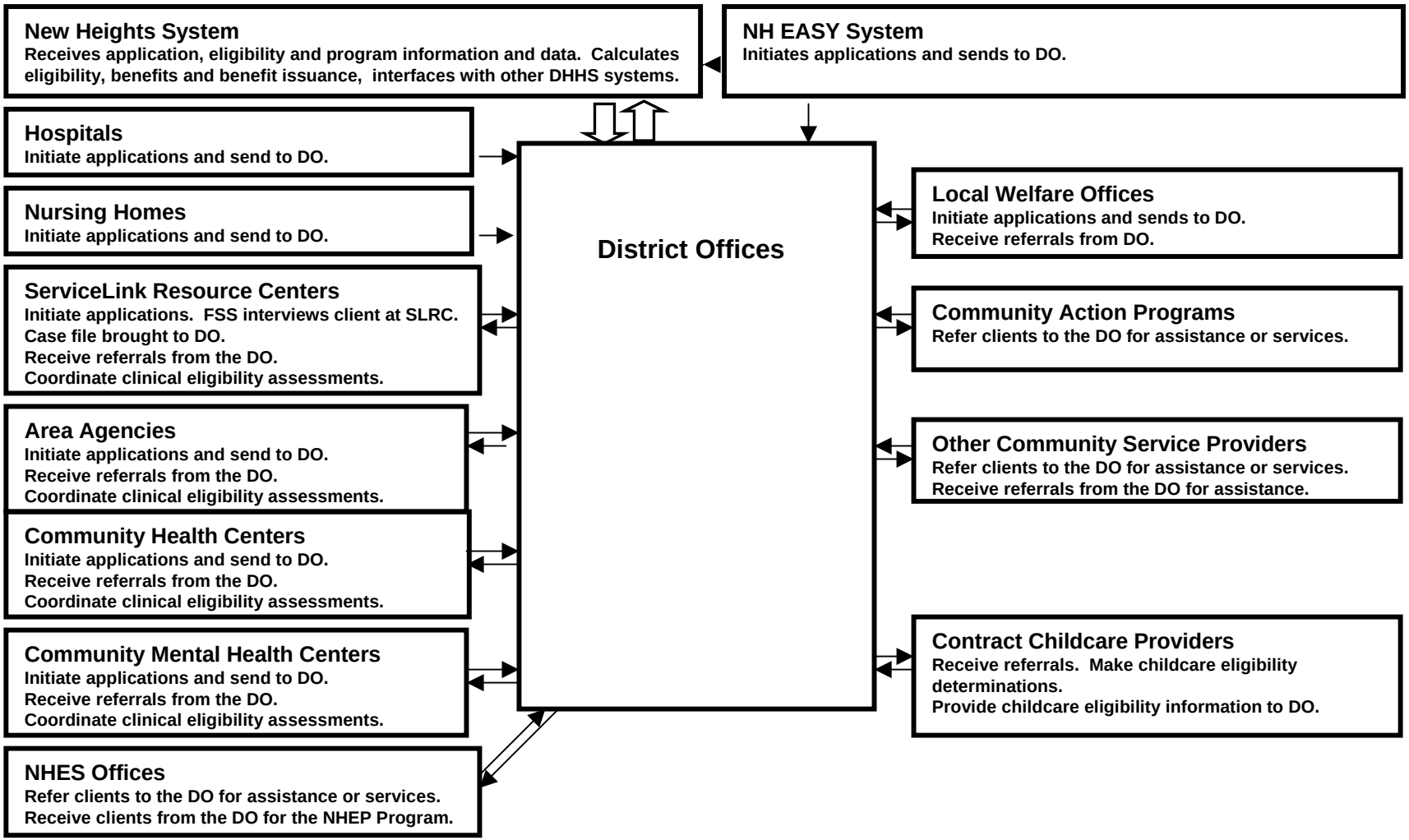
SDS Front Door Process Information Flows

The flow of information is an important part of the service delivery system. Information is generated from all components of the system.



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Today and the Future

Improvements to the DHHS Front Door process are needed to address the many demands and challenges it currently faces.

Front Door Today → **Front Door Future**

Some Challenges Faced in Today's Front Door Process:	Some Characteristics of a Future Front Door Process:
Inadequate space in some District Offices	Better utilization and consolidation of space with increased privacy and security for clients
High staff turnover	Increased employee satisfaction and longevity
Increasing diversity of people requesting services	Capacity to serve all client populations
Complexity of application process	Streamlined application process
Variability in level of customer service	Consistently high client satisfaction
Non-optimal staff coverage	Efficient and effective staffing
Limited hours of operation	Expanded access
Face-to-face interview requirements	More virtual processes
Low degree of computer automation	High degree of computer automation

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ACCES: Front Door Project

The ACCES: Front Door project will transition today's Front Door process to an improved future Front Door process. To accomplish this, the project will use the disciplines of Business Process Re-engineering, Lean Thinking and Organizational Change Management.

*The goals of the **ACCES: Front Door Project** are:*

To bring the Front Door process to a higher level of measured performance.

To define a repeatable process that can be used to improve the measured performance of other DHHS business processes.

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Purpose, Scope and Objectives

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Purpose and Scope

- Purpose
  - The purpose of the project is to redesign and implement a DHHS Front Door process to achieve enhanced quality and efficient delivery of client services.
- Scope
  - The Front Door process consists of the people, processes and tools (forms, systems, etc.) used to serve clients seeking DHHS assistance, from providing information and other help to clients, through the application for assistance and determination of eligibility processes, and up to the time the client receives the benefit or service.
  - The project will also include the redetermination of eligibility process.
  - The project will focus on all District Offices and the DFA assistance programs for which individuals or families could apply.
  - The project will also include client application processes and eligibility determinations conducted by providers including, but not limited to, hospitals, nursing homes, mental health centers and area agencies.
  - The project will NOT include the client appeal process should benefits be denied.

Objectives

- Project Objectives
  - Identify ways to streamline application and ease application process.
  - Identify and reduce delays, redundancies, confusion and non-value activities in the application process.
  - Utilize best practices and standard protocols.
  - Document a re-usable process that may be used to improve other DHHS business processes.

- Outcome Objectives
  - Make access to application for assistance easier.
  - Increase accuracy of eligibility determinations.
  - Increase client satisfaction.
  - Increase DHHS employee satisfaction.
  - Increase process standardization and efficiency.
  - Reduce time period between application for assistance and receipt of benefits.

High Level Approach

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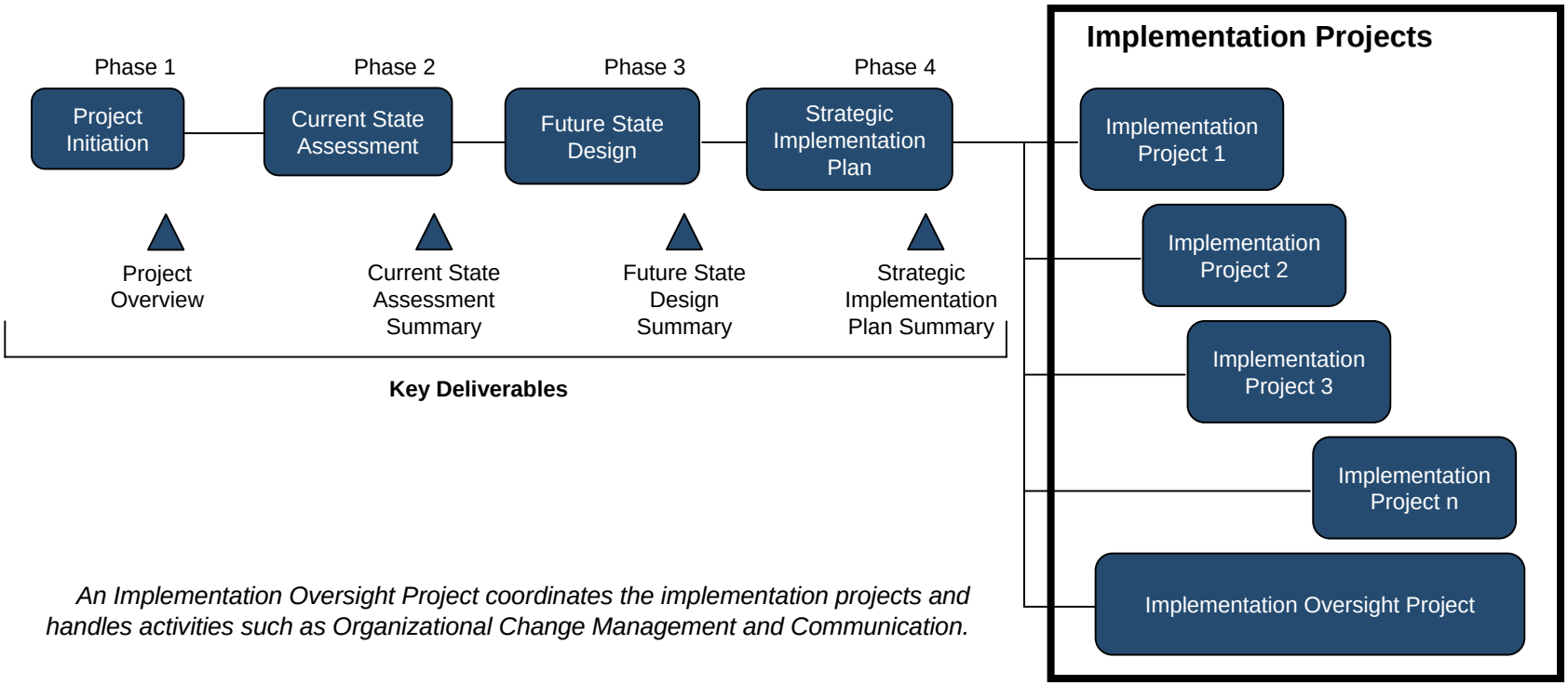
High Level Approach

The project consists of 4 phases plus several potential implementation projects.
The **Project Initiation Phase** is the planning portion of the project and defines the “project charter.”
The **Current State Assessment Phase** looks at the processes of the current Front Door process and its current performance metrics. Findings, issues and opportunities will be documented for review and analysis.
The **Future State Design Phase** sets target metrics to be achieved and designs a “future” Front Door process to meet those target metrics.
The **Strategic Implementation Plan Phase** defines several recommended **Implementation Projects** and a project map or roadmap outlining the sequencing and timing of the transition to the “future” Front Door process.



An Implementation Oversight Project coordinates the implementation projects and handles activities such as Organizational Change Management and Communication.

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Mid Level Approach and Deliverables

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Guiding Principles

- Utilize Metrics Driven Approach
- Apply Lean Thinking Concepts and Techniques to Identify “Value” in Work Processes and Eliminate “Waste”
- Drive Results not Just Recommendations
- Identify “Quick Hits” as well as Longer Term Solutions
- Include Process Improvements and Automation
- Implement and Foster Continuous Improvement
- Build Community Partnerships for Sustainability

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Phase 1: Project Initiation

- Approach
  - Define project's purpose, scope and objectives.
  - Define project's approach and deliverables.
  - Define project's governance, team, staffing levels.
  - Outline project's general timeline.
  - Review related projects for impact, influence and integration.
  - Identify an initial set of project critical success factors, risks and assumptions.
  - Review process improvement methodologies, such as **Metrics Driven Business Process Re-Engineering** and **Lean**, to guide approach.
  - Visit a District Office; begin to understand and observe front door process.
  - Create Context Diagrams for the Front Door process.
  - Draft High Level Process Framework for the Front Door process.
  - Conduct a High Level Survey of other states' front door processes, best practices and current research.
  - Establish Project Repository and Collaboration Environment.
  - Create a Project Overview in presentation format that serves as a "project charter."
  - Present Project Overview to Project Steering Committee and obtain approval.

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Phase 1: Project Initiation (continued)

- Approach (continued)
  - Create initial Project Plan
    - High level plan for Phases 1 - 4
    - Detail plan for Phase 2: Current State Assessment
  - Present Project Plan Overview to Project Steering Committee and obtain approval
- Deliverables:
  - Context Diagrams [ppt]
  - Initial High Level Process Framework [ppt]
  - High Level Survey of Front Door Process Best Practices [doc]
  - Project Repository / Collaboration Environment [eStudio]
  - Project Overview [ppt]
  - Project Plan [mpp]
  - Project Plan Overview [ppt]

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Phase 2: Current State Assessment

- Approach
  - Conduct Project Kickoff.
    - All project roles attend
    - Present Project Kickoff – a modified version of Project Overview
  - Create Project Brief (a short version of Project Overview to deliver standard message).
  - Review Other Related Projects – past, current and planned – for consideration and integration.
  - Refine and decompose High Level Process Framework for the Front Door process.
  - Define Service Metrics and Operational Metrics. Create Metrics Summary template. Populate template as metrics are defined.
  - Create Metrics Definitions.
  - Define Data Collection Strategy and Data Collection Plan for obtaining current state metric values.
  - Begin data collection, assess and refine data collection plan.
  - Calculate current metric values.
  - Create Value Chain, Process Maps and Narratives. Employ other Lean analysis tools.
  - Document Findings, Issues and Opportunities.
    - Findings – interesting statistics, observations, facts (neither good not bad)
    - Issues / Pain Points – conflicts, inconsistencies, redundancies, delays, poor quality, poor accuracy, …
    - Opportunities – improvement opportunities

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Phase 2: Current State Assessment (continued)

- Approach (continued)
  - Create Quick Hit List template. Populate as Quick Hits are discovered.
    - Quick Hits – opportunities that are relatively simple to make, not greatly dependent on others, provide immediate benefit; can be implemented in parallel with Front Door project.
  - Create Quick Hit Project Statements.
  - Define target metric values (initial draft).
  - Create draft of project Communication Plan and Communication Schedule.
  - Deliver Project Brief as needed.
  - Contact other states to understand their Front Door process and how they were able to implement them.
  - Summarize best practices, national trends and other research.
  - Obtain benchmark metrics. (as available – from other similar processes)
  - Analyze current state Front Door process and draw conclusions.
  - Implement Quick Hits.
  - Prepare Current State Assessment Summary
  - Present Current State Assessment Summary to Project Steering Committee and obtain approval.

Phase 2: Current State Assessment (continued)

- Deliverables:
  - Project Kickoff [ppt]
  - High Level Process Framework Analysis for the Front Door process. [ppt]
  - Metrics Summary [xls] – with Current, Benchmark and Target values
  - Metrics Definitions [doc]
  - Current State Process Maps [eDraw]
  - Current State Process Summary [doc]
  - Findings, Issues, Opportunities and Quick Hits [xls]
  - Quick Hit Project Statements (one page per Quick Hit) [doc]
  - Communication Plan (updated) [doc]
  - Communication Schedule (draft) [xls]
  - Current State Assessment Summary [ppt]
    - Current State Diagram
    - High Level Current State Process Flow and Summaries
    - Metrics Summary
    - Findings, Issues, Opportunities Summary
    - Quick Hits Summary
    - Next Steps

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Phase 2: Current State Assessment (continued)

- Some things to look at…
  - Compliance with standard processes, documents, forms, templates, etc.
  - Time analysis: elapsed time, work time, wait time
  - Recursive and redundant steps
  - Reviews and re-checks
  - Queues / delays
  - Accuracy / rework
  - Duplication of work
  - Client satisfaction

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Phase 3: Future State Design

- Approach
  - Finalize target metric values.
  - Define Scope of future Front Door process.
  - Define characteristics of future Front Door process.
    - Principles,
    - Objectives, …
  - Review Front Door process from other states / best practices. Visit other state(s) if appropriate.
  - Draft Continuous Improvement Strategy.
  - Analyze and create Future State Vision.
  - Document Future State process.
  - Highlight changes from Current State process.
  - Document Recommendations.
  - Identify Roadblocks / Barriers to Future State.
  - Rationalize Recommendations.
  - Prioritize and Size Recommendations.
  - Implement Quick Hits.
  - Create Future State Design Summary.
  - Present Future State Design Summary to Project Steering Committee and obtain approval.

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Phase 3: Future State Design (continued)

- Deliverables:
  - Future State Vision [ppt]
  - Future State Process Maps [eDraw]
  - Future State Process Summary [doc]
  - Continuous Improvement Strategy [doc]
  - Recommendations [xls]
  - Roadblocks / Barriers [xls]
  - Quick Hit List (updated) [xls]
  - Quick Hit Project Statements (additional) [doc]
  - Communication Plan (updated) [doc]
  - Communication Schedule (draft) [xls]
  - Future State Design Summary [ppt]
    - Future State Vision
    - Future State Diagram
    - High Level Future State Process Flow and Summaries
    - Recommendations Summary
    - Roadblocks / Barriers Summary
    - Quick Hits Summary
    - Next Steps

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Phase 4: Strategic Implementation Plan

- Approach
  - Group recommendations into implementation tasks.
  - Define implementation projects based on groupings.
  - Create Project Summaries for implementation projects.
  - Create Project Summary for Implementation Oversight Project.
  - Create Project Map and/or Implementation Roadmap.
  - Create Organization Change Management Strategy.
  - Complete Communication Strategy.
  - Complete Communication Schedule.
  - Refine Continuous Improvement Strategy.
  - Implement Quick Hits.
  - Create Strategic Implementation Plan.
  - Present Strategic Implementation Plan to Project Steering Committee and obtain approval.

Phase 4: Strategic Implementation Plan

- Deliverables:
  - Project Summaries for implementation projects [doc]
  - Project Summary for Oversight Project [doc]
  - Organizational Change Management Plan [doc]
  - Communication Plan [doc] (final)
  - Communication Schedule [xls] (final)
  - Continuous Improvement Strategy [doc] (final)
  - Quick Hit List (updated) [xls]
  - Quick Hit Project Statements (additional) [doc]
  - Strategic Implementation Plan [ppt]
    - Project Map
    - Project Overviews
    - Implementation Project Roadmap
    - Next Steps

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Example Implementation Projects

- Process Changes: New Roles, Responsibilities and Procedures
- Management / Organizational Changes
- Video Conferencing
- Technology Hardware Upgrade
- Telephone System Upgrade – ACD, Auto Attendant
- Client Self Service
- Document Management and Workflow Automation
- Process Improvement (training, mentoring/coaching, assessment, feedback, etc.)
- More…

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Implementation Oversight Project

- Oversee and coordinate implementation projects.
- Provide guidance and expertise to implementation projects.
- Execute Organizational Change Management Plan.
- Execute Communication Plan.
- More…

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Governance and Team

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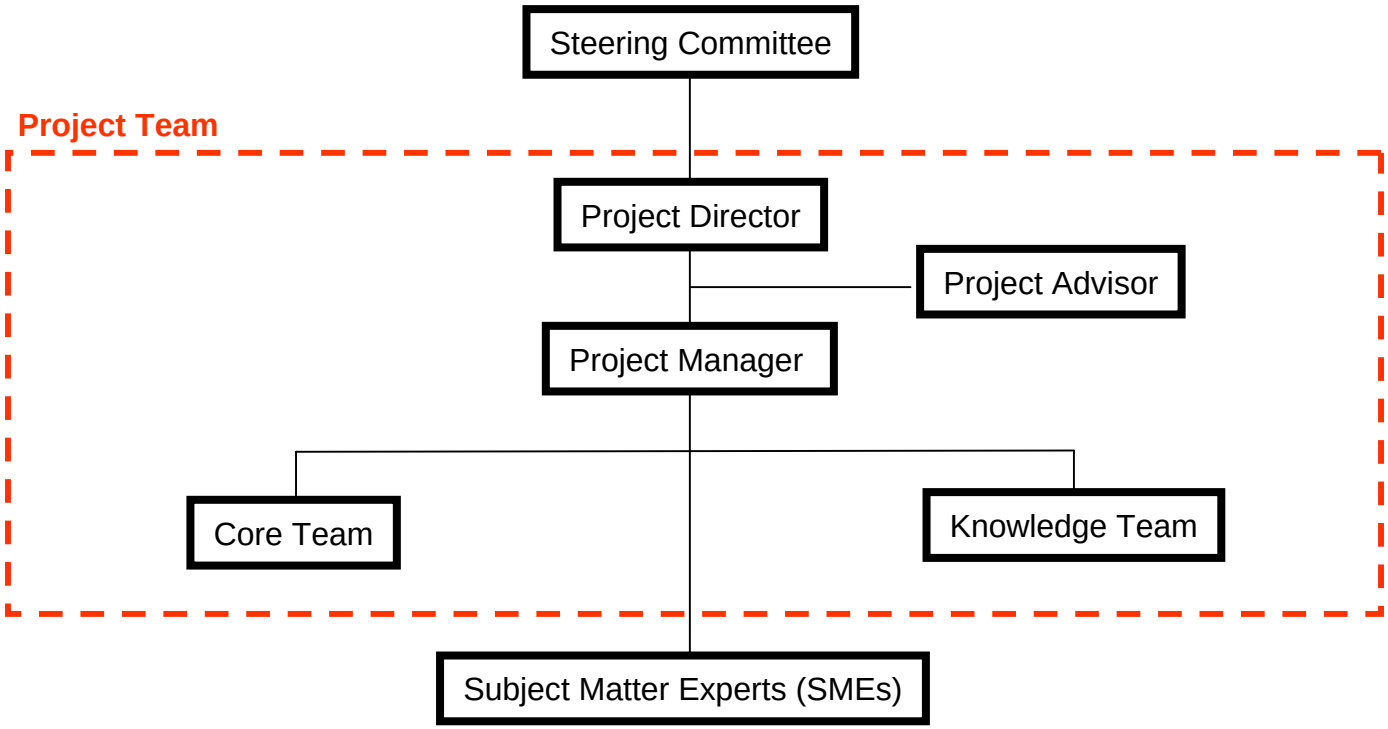
Project Organization



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Steering Committee

- Steering Committee (5% - 10% time commitment per member per week)
  - Consists of project stakeholders – people who have a vested interest and/or decision making authority over the effected organizations
  - Is the highest decision making authority for the project
  - Approves all decisions and deliverables
  - Eliminates roadblocks encountered by project team / drives project to success
  - Led by Executive Sponsor who is the ultimate decision maker for the committee
  - Membership
    - Nick Toumpas, Commissioner DHHS - Executive Sponsor
    - Mary Ann Cooney, Deputy Commissioner DHHS - Stakeholder
    - Nancy Rollins, Associate Commissioner DHHS - Stakeholder
    - Lloyd Peterson, Associate Commissioner DHHS - Stakeholder
    - Terry Smith, Director DFA - Stakeholder

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Project Leadership

- Project Director – Linda Paquette (40% - 80% time commitment per week)
  - Oversees and directs project
  - Decision maker regarding project process (project approach, deliverables, etc.)
  - Decision maker regarding project content (recommendations, requirements, etc.)
  - With Project Manager, presents status, risks, issues, etc. to Steering Committee
- Project Manager – Laura Collins (80% - 100% time commitment per week)
  - Oversees and directs Core Team
  - Oversees and directs Knowledge Team and SMEs' participation in project
  - With Project Director, presents status, risks, issues, etc. to Steering Committee
  - Responsible for project plan, schedule, quality and timeliness of deliverables, status reporting, risk and issue management
  - Runs project team meetings
  - Tracks quick hits
- Project Advisor – Bill Baggeroer (40% - 80% time commitment per week)
  - Advises Project Director, Project Manager and others in all matters of project process

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Core Team

- Core Team (10% - 100% time commitment per week depending upon role)
  - With Project Director and Project Manager, meets regularly as team to share, discuss, analyze, recommend, etc.
  - Creates deliverables under supervision of Project Director and Project Manager
    - Documents current state
    - Proposes future state and strategic implementation plan
  - Performs specific tasks per project plan / schedule
- Process Analyst
  - Leads process analysis and design – current state, future state
  - Draws process maps and other diagrams
  - Documents findings, issues, opportunities, quick hits
- Data Analyst
  - Leads metrics and statistics data collection from electronic sources
  - Assists with metrics definition, current state values, future state targets, process analysis, etc.

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Core Team (continued)

- Change Management and Communications Specialists
  - Leads change management / communications aspects of project
  - Creates Change Management Strategy / Plan
  - Creates Communications Strategy / Plan
- Controls and Compliance Specialists
  - Leads controls and compliance aspects of project
  - Focal point for privacy, security, accuracy, financial controls, HIPPA, etc.
- Systems and Tools Specialists
  - Focal point for systems and tools used – New Heights, NH Easy, etc.
  - Provides information on current state system usage
  - Assesses future state potential usage
  - Focal point for estimating effort and timing of potential changes to systems

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Knowledge Team

- Knowledge Team
  - Serves in an advisory capacity
  - Understands current state processes, forms, systems, procedures, etc.
  - Provides current state information, including differences across locations
  - Source for current state findings, issues, opportunities and quick hits
  - Advises with the definition of the future state
  - Represents one or more of the impacted areas – District Office, DFA, DCYF, Service Link, Area Agencies, etc.
  - Facilitates access to SMEs
  - Time Commitment per member: 0 - 8 hrs / wk
    - Attend interviews, workshops, other meetings (e.g. Project Kickoff): 0 - 4 hrs / wk
    - Review deliverables, provide feedback, complete action items assigned: 0 - 4 hrs / wk

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Subject Matter Experts (SMEs)

- Subject Matter Experts (SMEs)
  - Understands current state processes, forms, systems, procedures, etc.
  - Provides current state information, including differences across locations
  - Source for current state findings, issues, opportunities and quick hits
  - May review and comment on future state design (optional)
  - Time Commitment per SME: 0 - 6 hrs / wk
    - Attend interviews, workshops, other meetings (e.g. Project Kickoff): 0 - 3 hrs / wk
    - Complete action items assigned: 0 - 3 hrs / wk

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Timeline

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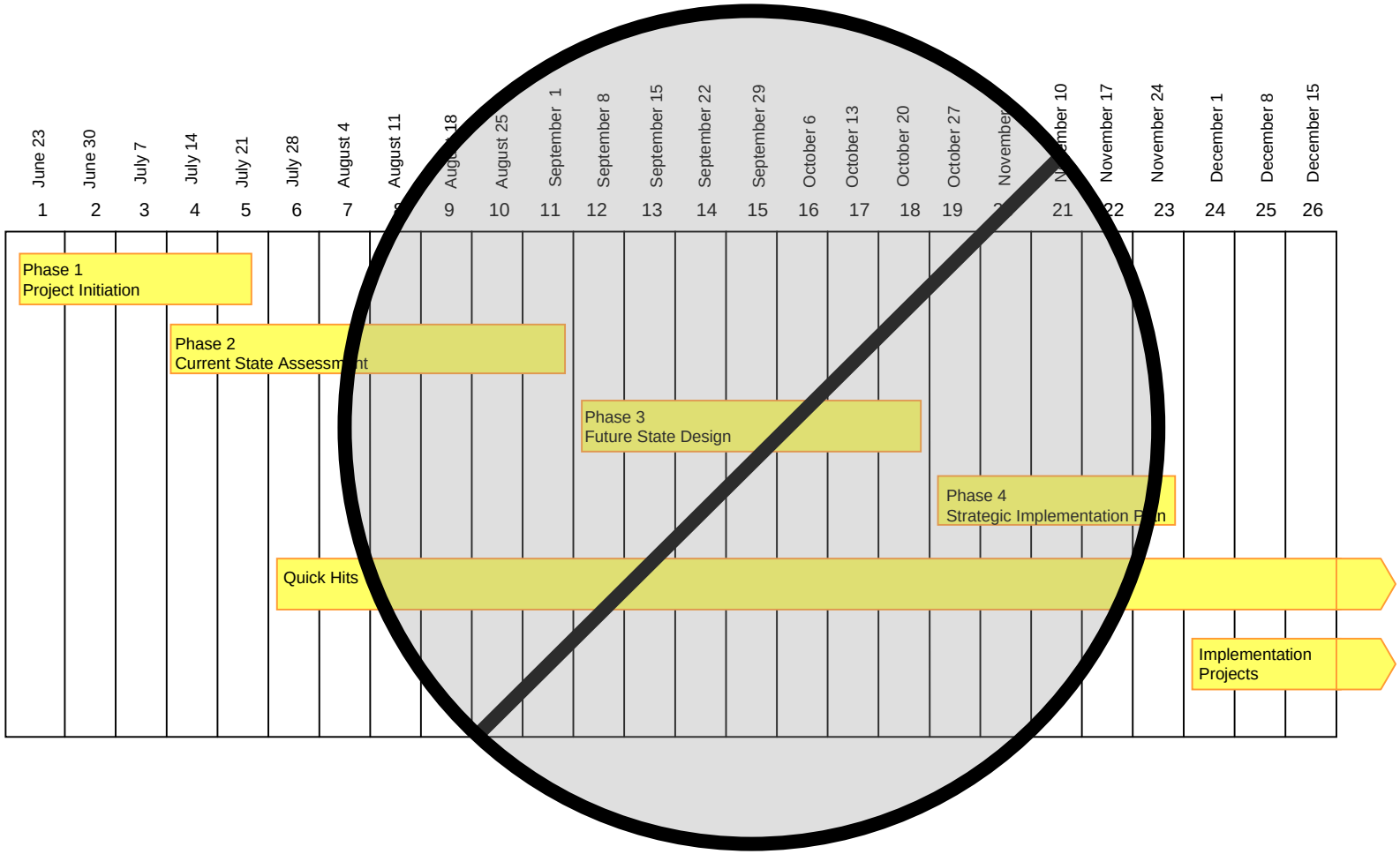
Project Timeline – 26 Week Horizon



To be determined after agreement on Project Overview, Project Plan and staffing levels.

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Other Related Projects

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Other Related Projects

Responsible Organization	Project Name	Purpose	Status	Impact / Comments
DHHS Office of Improvement and Integrity	DFA Work Process Analysis	Review DFA District Office work processes and make recommendations for improvement	Completed June 2006	Some recommendations were implemented; not metrics driven; good reference source; source for lessons learned and for Front Door project's critical success factors.
DHHS Human Resources	Workforce Development	Facilitate task force tasked with DHHS workforce development.	In Process	Task force to consider initiatives to accommodate mobility, telecommuting, succession planning, flex-scheduling and training.
DHHS Office of Improvement and Integrity	Balanced Scorecard	Facilitate development of balanced scorecards at each level of DHHS to align strategic planning and performance measurement.	In Process	Development of Balanced Scorecards throughout DHHS will cascade from key performance indicators developed in conjunction with Deloitte.
Deloitte Consulting/ DHHS Office of Improvement and Integrity	DHHS: Key Performance Indicators	Develop a discrete set of department level performance indicators represented in dashboard form.	In Process	KPI's to be utilized during budget session. From these other performance measures will cascade during development of balanced scorecards throughout DHHS.
DHHS Bureau of Administration	District Office Survey Report	Access client satisfaction	In Process	Individual follow-up with clients; assess monthly for trends.
DFA Field Operations	Walk In Hours Proposals	Refinement of DFA District Office eligibility work processes.	In Process	Submitted to Commissioner's Office

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Other Related Projects

Responsible Organization	Project Name	Purpose	Status	Impact / Comments
DFA TANF Program	TANF Precision Case Management	Defining clear client target outcomes, re-engineering of TANF client case management, and developing outcome measurements related to case management processes	In Process	
DFA New Heights	NH Easy	Developing remote application filing capability for benefits that do not require face-to-face interviews.	In Process	Enhanced customer service and increased worker efficiencies. Phase I making remote applications available through provider agencies complete. Functionality expansion underway subject to funding.
DFA New Heights	Paperless Application and Case File System	Creation of a n electronic storage system for client applications, verifications, and other case data.	In Process	Dollar savings through reduced rental of space for centralized paper filing and archiving. Currently at feasibility stage.
DFA/DCYF/DPH/ Others	Child Well-Being Task Force	Creation of a one-stop shopping process for all children's programs regardless how they enter the Department.	In Process	Includes defining all Departmental services for children and ensuring all children are linked; meeting with legislature and other entities to define scope and enhance credibility around budgeting. Phase I cataloging of children's services by town. Procurement of Refer 7 data base underway. Next steps: data entry into Refer 7 and gap analysis

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Other Related Projects

Responsible Organization	Project Name	Purpose	Status	Impact / Comments
DHHS, DCBC, BEAS ServiceLink Program	SLRC Quality Process Improvement Activity for LTC Services	Improve ServiceLink information and awareness, and streamline the multiple eligibility processes and systems utilized for LTC ((Long Term Care) services.	In Process	The current draft work plan, objectives, deliverables, and key tasks can be obtained by contacting Wendi Aultman, SLRC Program Manager at BEAS. To include provision of standardized training, core competencies, and tools for implementing the LTS options counseling services as well as implementing supervisor curriculum. Timeline currently being developed.
DHHS, DCBC, BEAS ServiceLink Program	ServiceLink Telecommunications Improvement Project	Streamline, improve and enhance telecommunications systems at all SLRC's in an effort to provide improved customer service.	In Process	DHHS, DCBC, BEAS ServiceLink Program
DHHS, DCBC, BEAS ServiceLink Program	SLRC Public Searchable Database and Website	To provide electronic access to specialized information and service options related to Older Adults, Adults with Disabilities, Caregivers, and their families.	In Process.	Planning underway. Database and website are on target to be launched by the end of September.

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Critical Success Factors, Risks and Assumptions

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Critical Success Factors

- DHHS leadership is fully and actively committed to the Project.
- Key stakeholders fully endorse and support the Project.
- Impacted staff have input into the Future State Design.
- Impacted staff accept and embrace Future State Design.
- Impacted systems will accommodate Future State Design.
- Recommendations are “projectized”, prioritized, assigned, scheduled, tracked and reported.
- Office of Improvement and Integrity drives the improvement implementation projects.
- Improvements are metric based.
  - Metrics are measurable and clearly defined
  - Current state metrics are computed and agreed up by all stakeholders
  - Future state target metrics are specifically set
- The right people are involved at the right time in the right place (scope of responsibilities) with appropriate roles.
  - Project governance is clearly defined and agreed to
  - Project team roles and responsibilities are clearly defined and communicated

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Risks

- Competing demands on Steering Committee and Project Team members' time may delay or derail project.
- Project's scope, size, complexity and duration may impact sustained commitment.
- Risk losing sight of project goals with too much focus on details.
- Resistance to change at all levels of DHHS organization.
- Interested and active community partners may become impatient and concerned that changed does not occur as fast as they would like.
- Lack of dedicated resources may cause inefficiencies and schedule delays.

Assumptions

- Project deliverables are created, reviewed and approved on a timely basis.
- Meetings are attended by those who are requested to attend.
- Steering Committee and Project Team will use eStudio as the primary project management and collaboration tool.

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Appendices

Appendix A: Lean Thinking

- Definition of Lean Thinking
  - A process improvement strategy that employs a systematic approach to identifying waste (non value-added activities) and eliminating the identified waste through continuous improvement to permit the flowing of product at the demand pull of the customer in pursuit of perfection (zero waste).
- Principles
  - Value
    - Focus on the true value to the client
  - Value Chain
    - What are the operations from start to finish
    - Which operations produce value? Eliminate the ones that don't.
    - Think outside departmental boundaries and avoid batches and specialization
  - Flow
    - Think about one transaction moving through the process
    - Remove waste: wait, rework, loop backs, errors, delays, etc.
  - Pull
    - Have the client pull the services
    - Respond to the client's needs, when and how he/she wants it
  - Perfection
    - Seek zero waste, 100% satisfied client
    - Be careful when benchmarking – better than the rest is not good enough

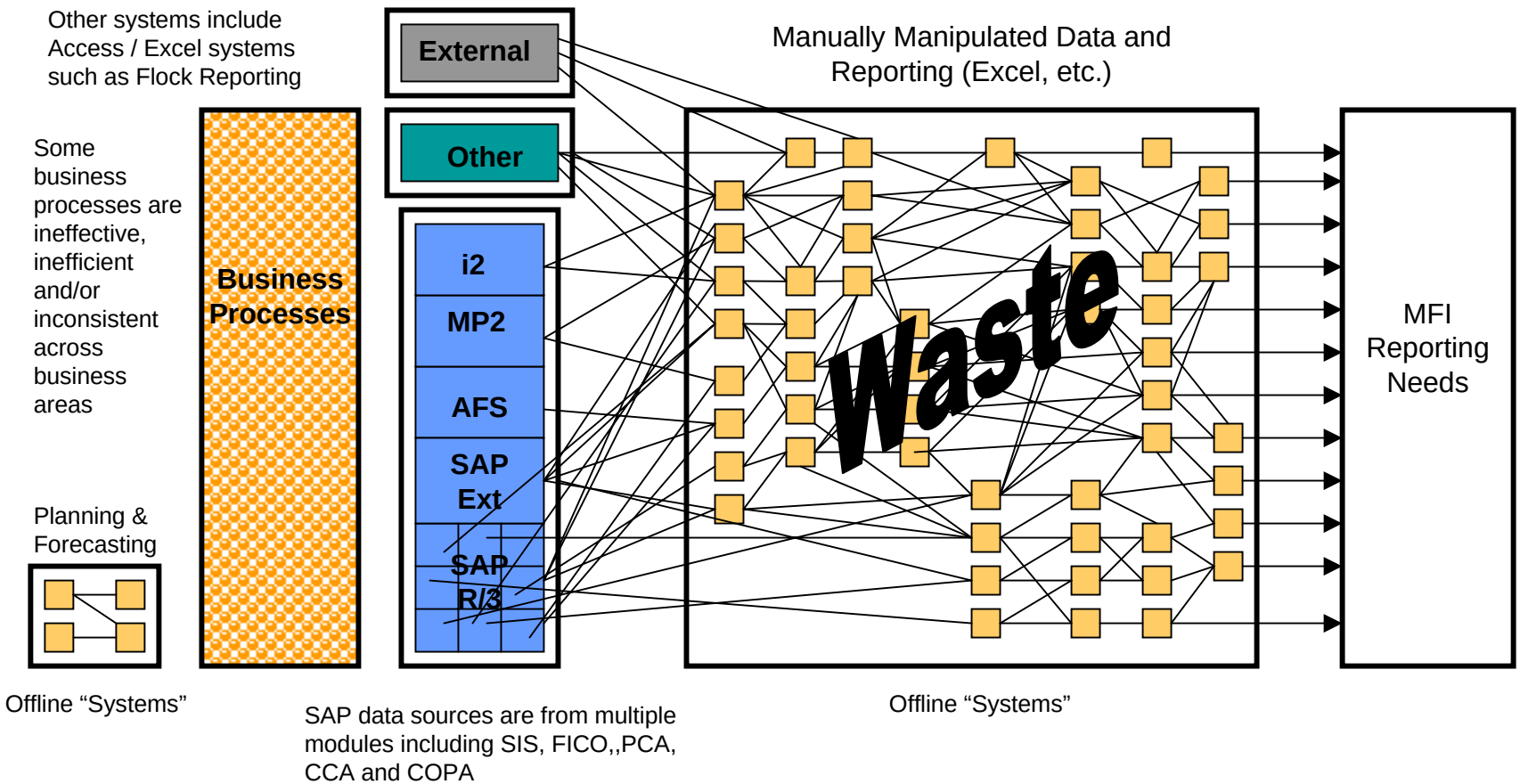
Appendix A: Lean Thinking (continued)

- Concepts
  - Transparency
    - Share information up, down and across
    - Give and report true and accurate status; don't hide information
  - Team and Collaboration
    - Involve those impacted with process design
    - Reduce specialization – everyone can do everyone's job
    - Focus is team success over individual success; if someone falls behind, others help him out
  - Think Beyond the Boundaries - Outside the Silos
    - Don't look At organizational units / functions – look at the whole process
- Tools and Techniques
  - Value Chain
  - Cause and Effect (Fishbone) Diagrams
  - Observation Sheets
  - Histograms
  - Pareto Charts
  - Process Maps
  - SIPOC Diagrams (Suppliers – Inputs – Process – Outputs – Customers)

Example Deliverables

Current State Diagram (BIPM) Example

Today's current state business reporting is severely limited in its accuracy, timeliness, effectiveness and efficiency due to the offline processes to deliver vital management information



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Findings, Issues, Opportunities, Quick Hits (Fictitious) Examples

- Findings
  - Over 2000 complaints from people requesting assistance are received each year
- Issues
  - Average wait time to initiate application exceed 90 minutes
  - Staff turnover exceed 30% per year
  - New staff members are not adequately trained
  - Volume of work performed by field support staff varies significantly across District Offices and with District Offices
- Opportunities
  - Create triage process to reduce application time of simple requests
  - Enhance NHEASY to support FDP
- Quick Hits
  - Post instructional information signs in waiting areas of each District Office, in the primary languages of the DO

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Future State Vision (Enterprise Operations Monitoring) Example

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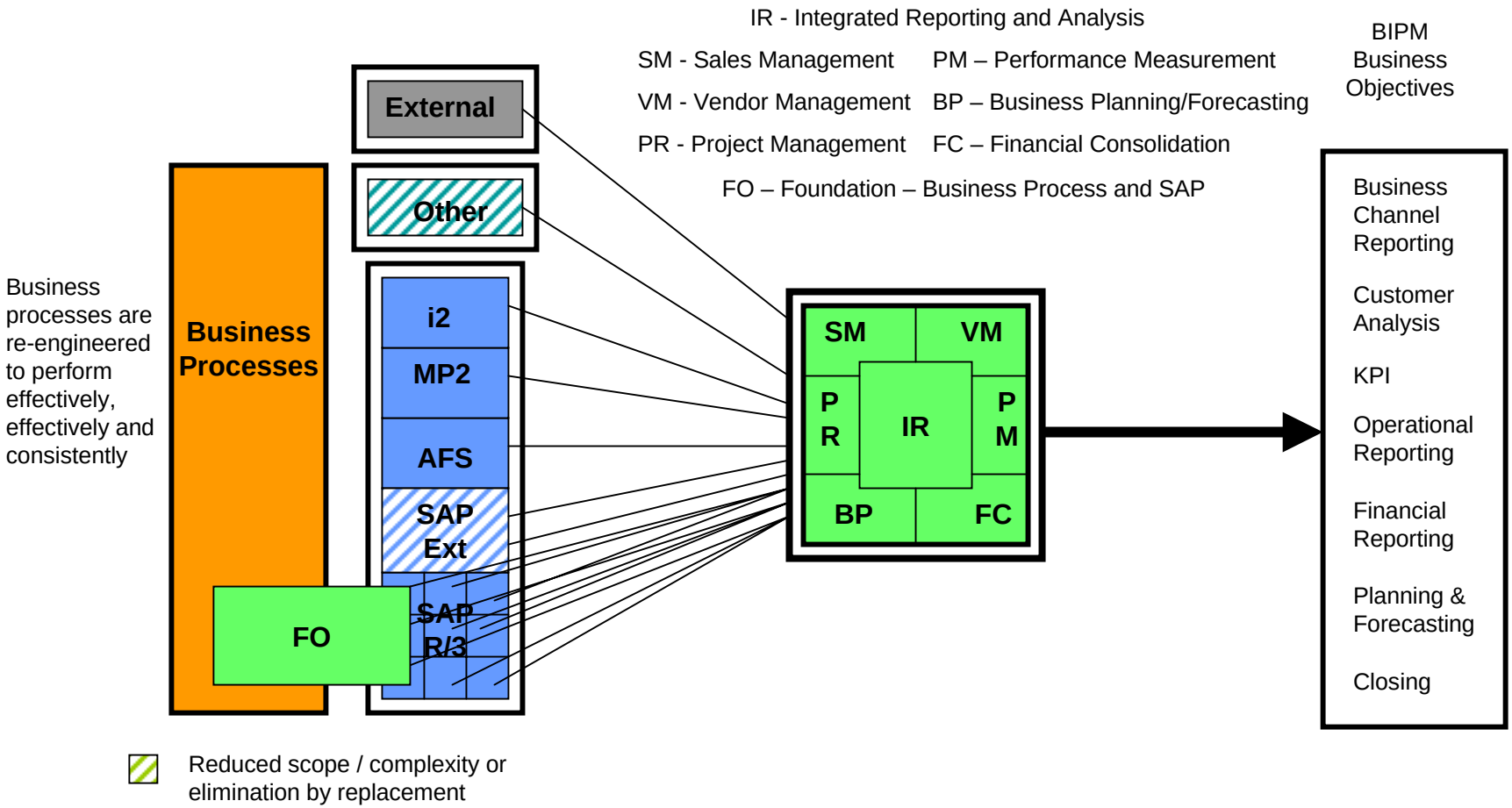
Future State Diagram (BIPM) Example

Business solution satisfies the requirements gathered



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Roadblocks / Barriers (Fictitious) Examples

- Staff will resist sharing information about their work in fear of exposure of defects and inefficiencies.
- Staff will resist cooperating in fear of staff cutbacks.
- Resistance to change.

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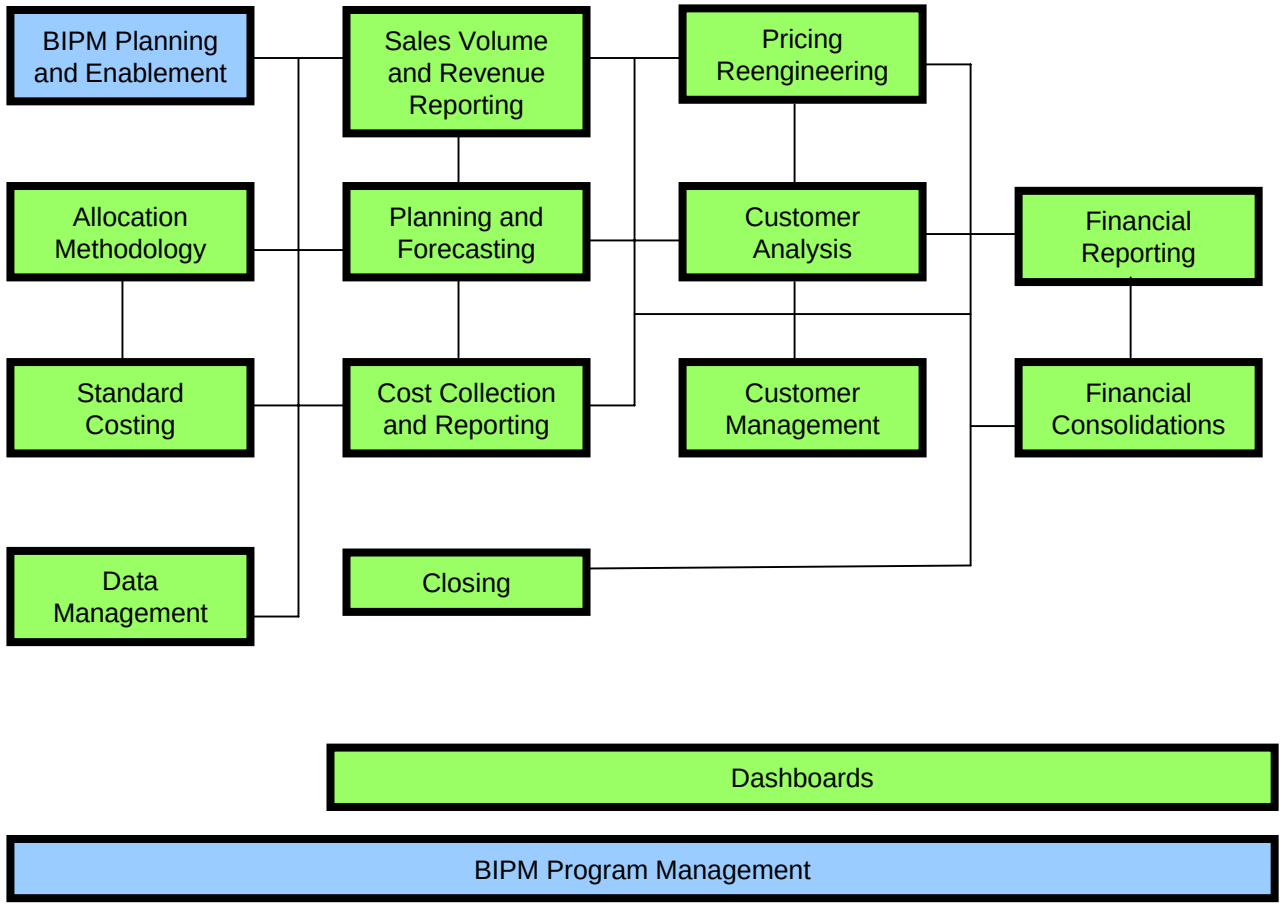
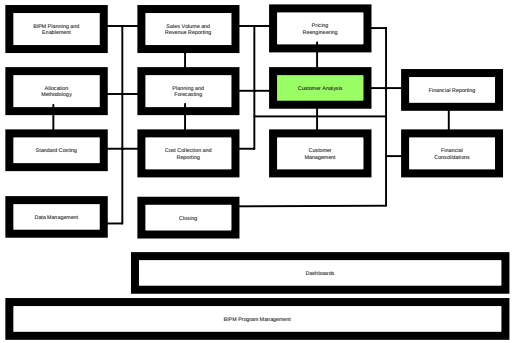
Project Map (BIPM) Example

The BIPM Program has been divided into 15 interdependent projects: 13 business projects which will deliver specific business value, and 2 program infrastructure projects to plan, enable and manage those 13 projects



Project Summary - Customer Analysis (BIPM) Example



Purpose

The purpose of the BIPM Customer Analysis project is to deliver improved business processes and system tools to produce and analyze customer volume, revenue and profitability information

Description

- ❑ Design, develop and implement improved business processes and system tools to produce reports and analyze customer volume, revenue and profitability information
  - Year over year actual sales volume, gross and net revenue
  - Future sales volume and revenue analysis
  - Version control
  - Year over year actual deviated volume
  - Integration of external data - billback volumes
  - Timely blended rate analysis
  - Plan and forecast comparison reporting
  - Reporting at various levels of product, customer and sales hierarchies
  - Current and future profitability analysis
- ❑ Design, develop and implement workflow system tools for communication and approvals
- ❑ Design, develop and implement improved system tools to produce reports and analyze trade spending information
- ❑ Reporting at various levels of product, customer and sales hierarchies

Benefits

- ❑ Reduced time and effort to produce customer analysis reports
  - ➢ Current 8 week process reduced to 7 day - start to finish
- ❑ More timely and accurate customer analysis reports
- ❑ Faster, more complete analysis of customer volume, revenue and profitability information
- ❑ Timely adjustments to blended rates
- ❑ Online access to customer analysis information with drilldown capability
- ❑ Enhanced reporting for trade channel, sales organization, brokers and customers

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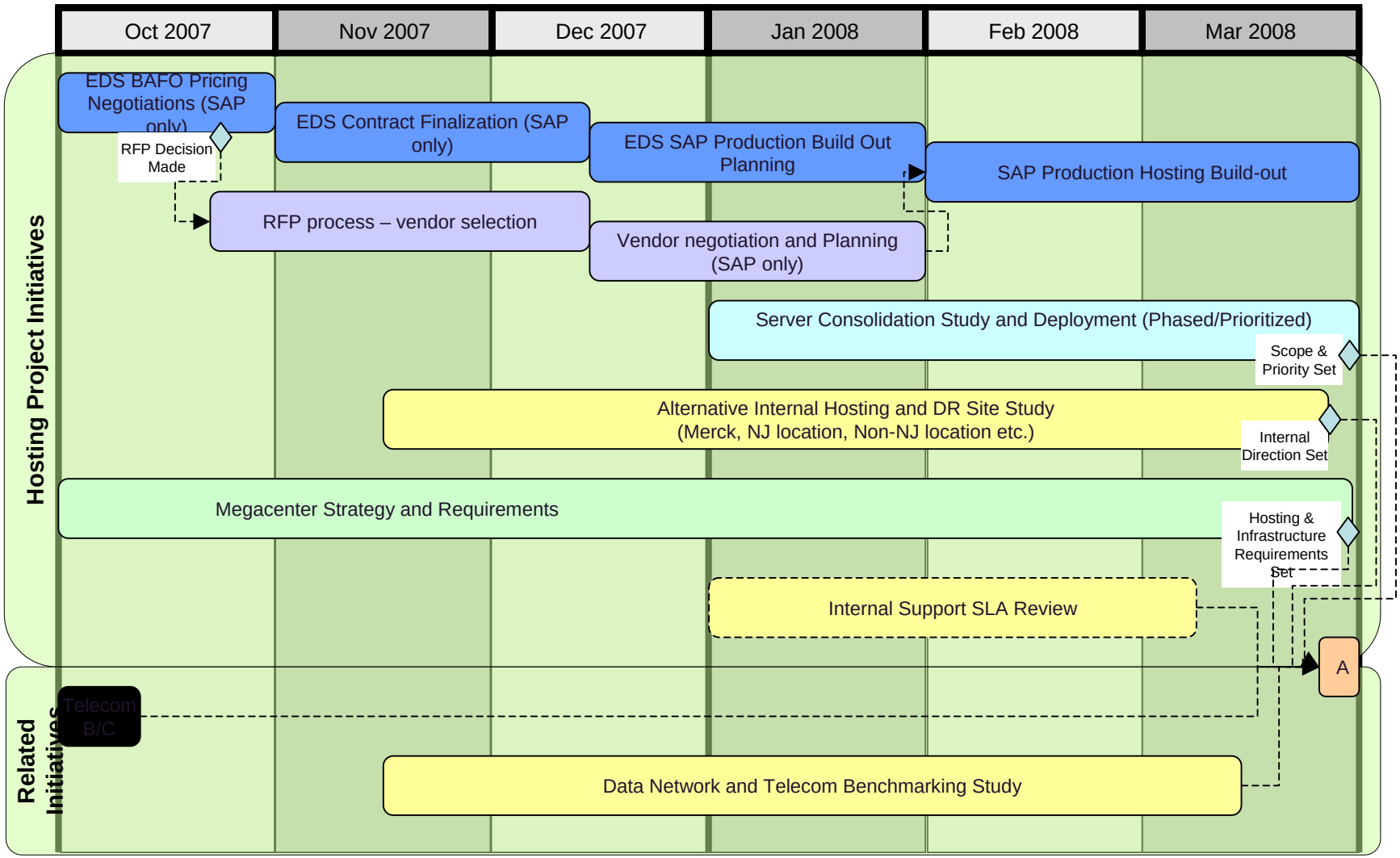
Roadmap (Hosting) Example



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