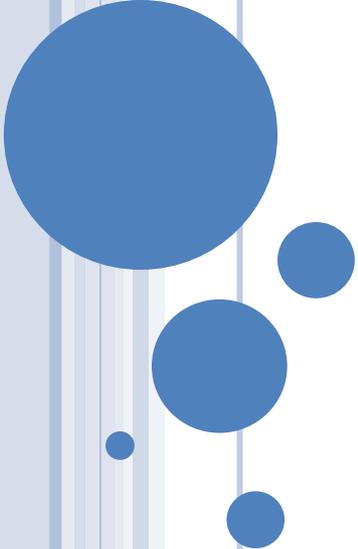


**Kaizen Event Report Out**  
**Development Service Agency**  
**June 3 – 7, 2013**  
**Report Out Date: June 14, 2013**

# **PIPP PLUS PROGRAM**

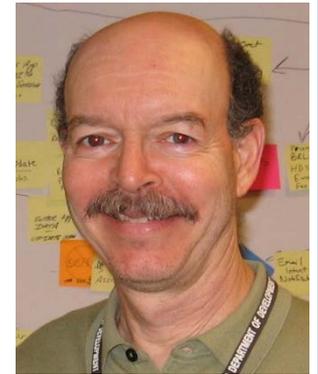
## **RE-VERIFICATION PROCESS**



**Ohio**

**Development  
Services Agency**

# “SUE MOSER AND THE PIPPS”



# TEAM MEMBERS

- Sharon Smith
- Adam Hill
- Tamara Johnson
- Donna Cotton
- Jesse Hines
- Rochelle Stewart
- Jessica Ashford
- Keneka Jordan
- Sheila Holmes
- Heidi George
- Susan Moser
- Tera Creachbaum
- Mike Doss
- Ahsan Mulk
- Howard Tibbs
- Olivia Dillehay
- Colette Harrell
- Nichol Ross
- Donnella Johnson

## STAKEHOLDERS

- Regulated utility customers
- PIPP Plus participants
- Legislators
- HEAP agency personnel
- OCA staff
- PUCO

## BACKGROUND

- Every PIPP Plus participant must provide income documentation to ODSA or a local HEAP agency to verify that he/she is still eligible to participate in the program. There is an excess of 400,000 clients who must re-verify income annually which leads to long lines at agencies and backlog at OCA. We are looking to streamline and improve the process to shorten the time to re-verify the client.

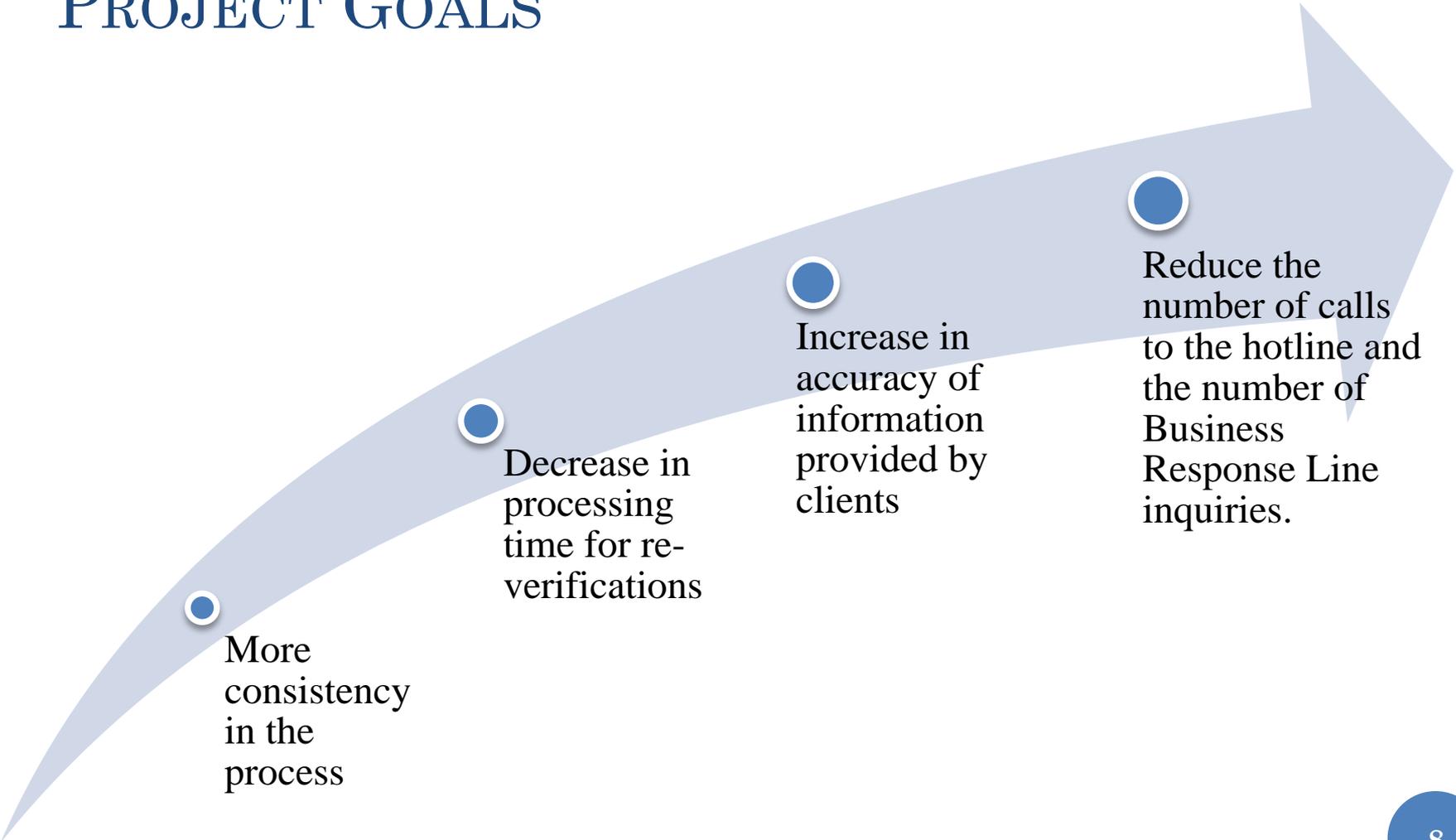
## SCOPE OF EVENT

- First Step: Clients receive notification that they need to re-verify their income.
- Ending Step: The client receives a letter advising them that they have been re-verified or a letter advising them that they have been dropped from the program.

## OUT OF SCOPE

- No additional staff
- No additional money
- No IT solutions until the process is improved
- No changes to laws or labor contracts
- No one loses their job because of the Kaizen event, although duties may be modified
- No legislative changes or changes to collective bargaining agreements
- Other

# PROJECT GOALS



More consistency in the process

Decrease in processing time for re-verifications

Increase in accuracy of information provided by clients

Reduce the number of calls to the hotline and the number of Business Response Line inquiries.

# KAIZEN DEFINED

- Customer Focused
- Work level team
- One week
- Quick and Simple-action first
- Necessary resources available right away
- Immediate results, new process functioning by end of next week



# THE KAIZEN APPROACH

**Team-based energy and creativity drives immediate process improvement**

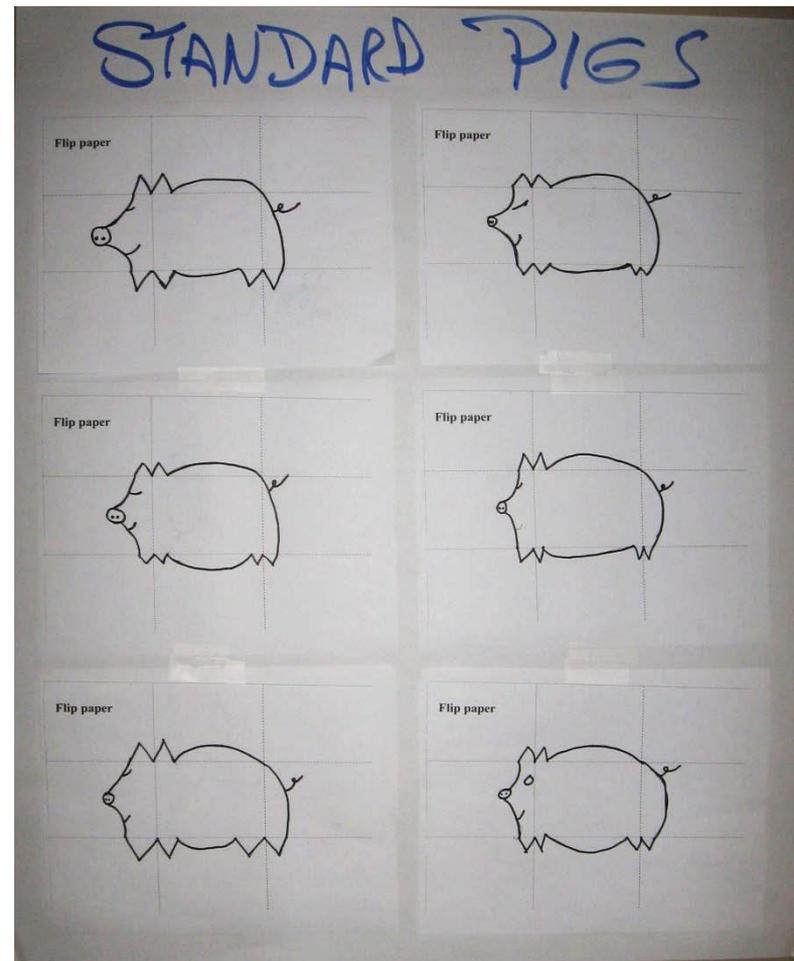
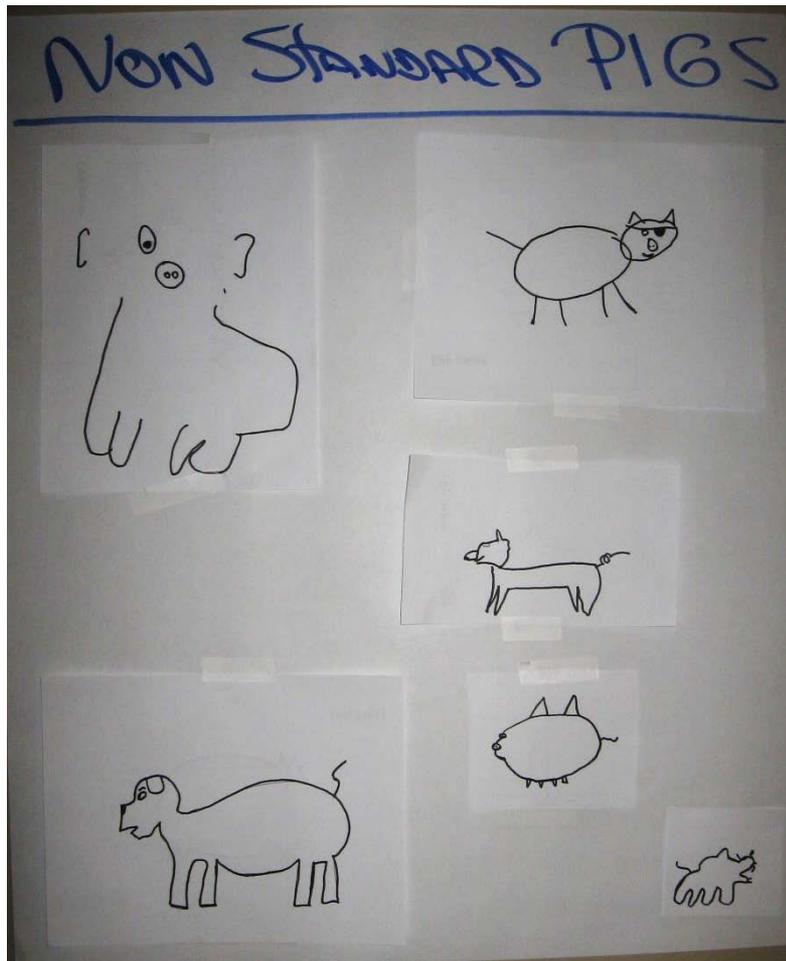
<b>DAY 1</b>	<b>DAY 2</b>	<b>DAY 3</b>	<b>DAY 4</b>	<b>DAY 5</b>
<p><b>Day of Learning and Level Setting:</b></p> <p>Getting everyone of the same page</p>	<p><b>Day of Discovery:</b></p> <p>Making the invisible visible</p>	<p><b>Day of Improvement:</b></p> <p>Creating the new process</p>	<p><b>Day of Design:</b></p> <p>Implementation &amp; action planning</p>	<p><b>Day of Fine Tuning &amp; Communication:</b></p> <p>Celebration &amp; sharing results</p>

At the end of the week, each Kaizen team has designed dramatic operational improvements and plans for 30-60-90 day follow ups

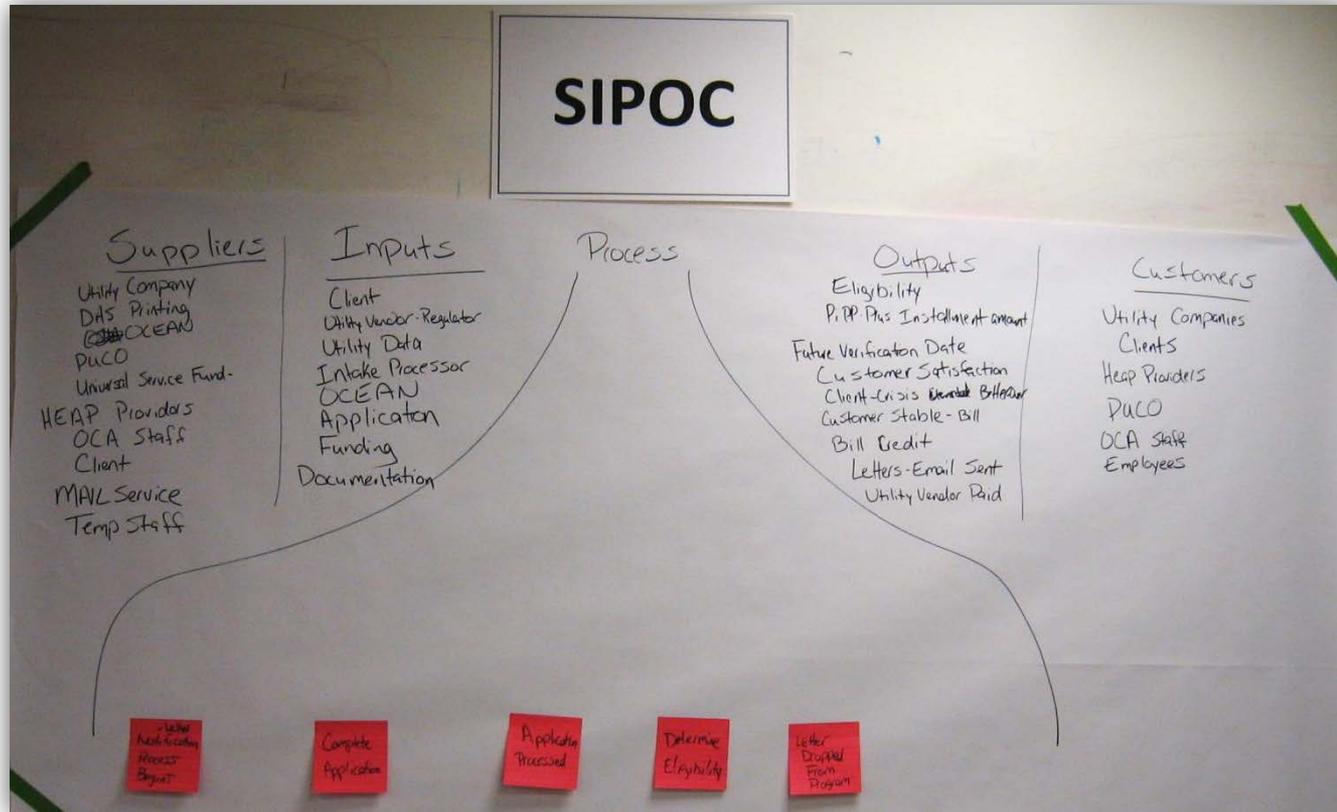
## BASELINE DATA

- Number of customers: 419,234 distinct clients  
(Mar 2013)
- Number of re-verifications completed: 377,599  
distinct
- Number of OCEAN help desk tickets: 644
- Number of BRL's : 1663
- Time spent on BRL's: 305 hours

# STANDARDIZATION



# HIGH LEVEL PROCESS - SIPOC

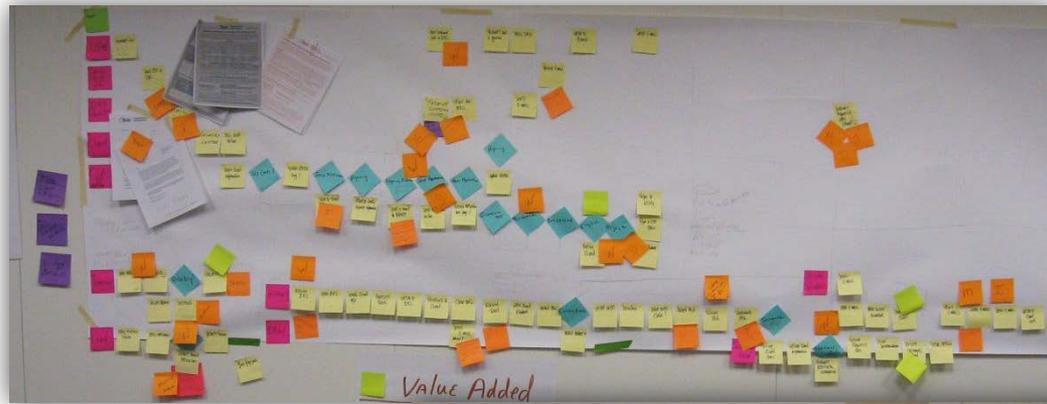


# CURRENT STATE PROCESS MAP

- Too many steps
- Too many handoffs
- Too many decisions
- Too much TIM WOOD
- Too many loop-backs
- Multiple Entry Points
- No way to track application throughout process



# CURRENT STATE PROCESS MAP



- Steps: 140
- Handoffs: 31
- Decisions: 22
- Waste: 66
- Loop-backs: 6

# TEAM BRAINSTORMING

- Generated Over 110 improvement ideas
- Categorized ideas based on “Impact” and “Control”

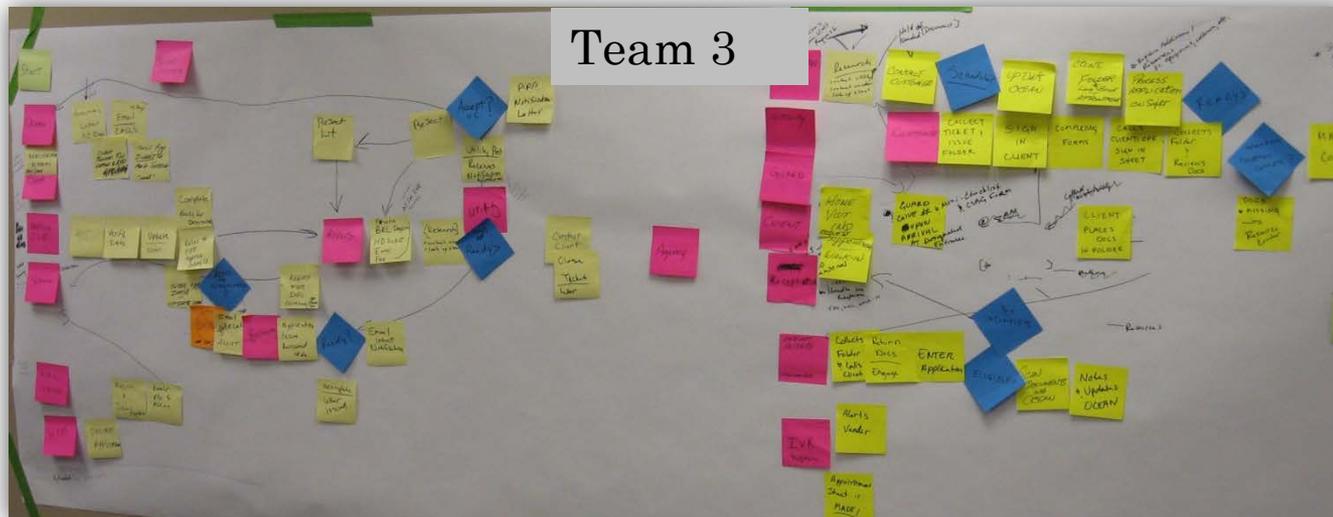
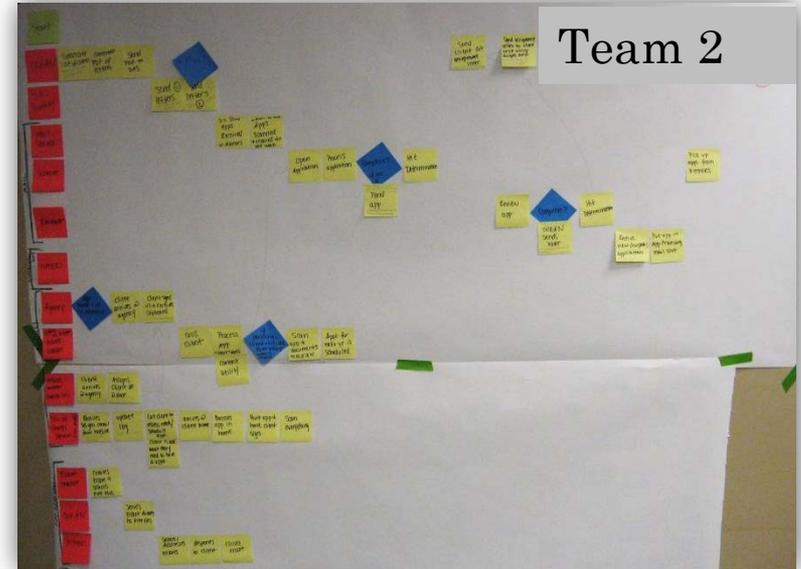


# TEAM BRAINSTORMING

- Standard process recommended for agencies
- Standard verification date
- Provide customer more information at beginning
- Updates to Oceans to make it more streamlined
- Review retention schedule for agencies



# CLEAN SHEET REDESIGN



# CLEAN SHEET REDESIGN

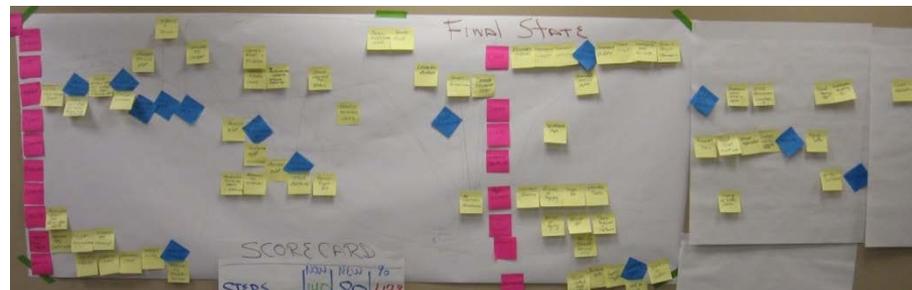
Common	Unique
Social Media	Ocean Calculate Income
Email Letters	Highlight PIPP Issues on Screen
Video Outreach	Reduce Paper



# CURRENT TO FUTURE STATE



## Future State



# SCORECARD

Measure	Current Level	NEW	Change
Process Steps	140	<b>76</b>	<b>45%</b>
Loop Backs	6	<b>1</b>	<b>83%</b>
Hand-Offs	31	<b>17</b>	<b>45%</b>
Decision Points	22	<b>14</b>	<b>36%</b>
Points of Waste	66	<b>0</b>	<b>100%</b>
Process Lead Time	4-18 Weeks	<b>1-6 Weeks</b>	<b>33-66%</b>

# COST SAVINGS

## Cost Savings to Customer

Mail/Travel Savings	\$972,000.00
For Walk-in clients save between: 4 hours and 4 weeks.	808,400 Hours

## Agency-OCA

Mass Mailing reduction	\$5,000.00
------------------------	------------

Time Travel: no mail truck run	416 Hours
--------------------------------	-----------

## Local Agencies

Supplies, Storage and Shredding	\$600,000.00
---------------------------------	--------------

**TOTAL SAVINGS \$1,577,000.00**

**COST SAVINGS**

① Cost Savings Customer:

(200,000) mailing

① \$972,000.00 - COST (Travel Savings) 1000.00 per person

② 808,400 = Time (Time in walk-in - 4hr per person + Time in mail process 4 week per person)

② AGENCY-OCA:

① Mass mailing reduction - \$5,000.00

② Time Travel - 416 hrs (No mail truck run)

B. LOCAL AGENCIES:

① \$600,000.00 - COST (Supplies/storage/shredding)

# MORE RESULTS

- Better use of technology
- Better utilization of staff
- Standardization of forms
- Uniform process
- Improved communication and cross trainings for different sections
- Improved letters to clients that are straight forward and at grade level
- Increase awareness of program for clients



# IMPROVEMENT SUMMARY

## Current Key Issues

Non-Standardize process  
between OCA and  
Community Action

Large backlog of clients and  
apps

No client access to  
information and application

Client confusion regarding  
when they need to re-verify.

## How We Improved

Create standardize  
model for Income  
Verification in Ocean

Eliminating batching of  
re-verification letters

Website FAQ and online  
app and tutorials

Lock-standard re-  
verification date

# IMPLEMENTATION PLANS

- IT Plan
- Training Plan
- Dashboards
- Communication Plan
- Webpage
- Timeline Plan

# ACTION REGISTER: IT

What	Who	When
Add over income status to PIPP app	Chris	Currently in UAT
Upload scanned docs to all current associated household members.		
Develop timeline report to show time from app scan date to utility acceptance letter		
Add client # + rev. date locator to website	IT	In test in August in portal

What	Who	When
Sort comment report + comments on details page by date	Chris	"5-Second fix"
OCEAN ticket notes added to client comments	IT	already in process 6-9 months
Talk to IT a/b funneling BRL into OCEAN	Chris	
Add more info on ticket email		
Bypass Help Desk when ticket queue is selected	Chris	Currently in UAT

WHAT	WHO	WHEN
OCEAN INCOME CALCULATION <sup>HEAP auditing changed</sup>	Te/Est NICHOL	2014 HEAP
Missing info letter: add statement to return letter	Chris	
Put missing info apps into FIFO	Chris	
Rev. letter: add statement to direct clients to website to get HEAP app	Chris	
Enter validation error for anyone over 18 missing income for PIPP app	Chris	
Add scheduling feature for CA's	IT	already in the works 1 year

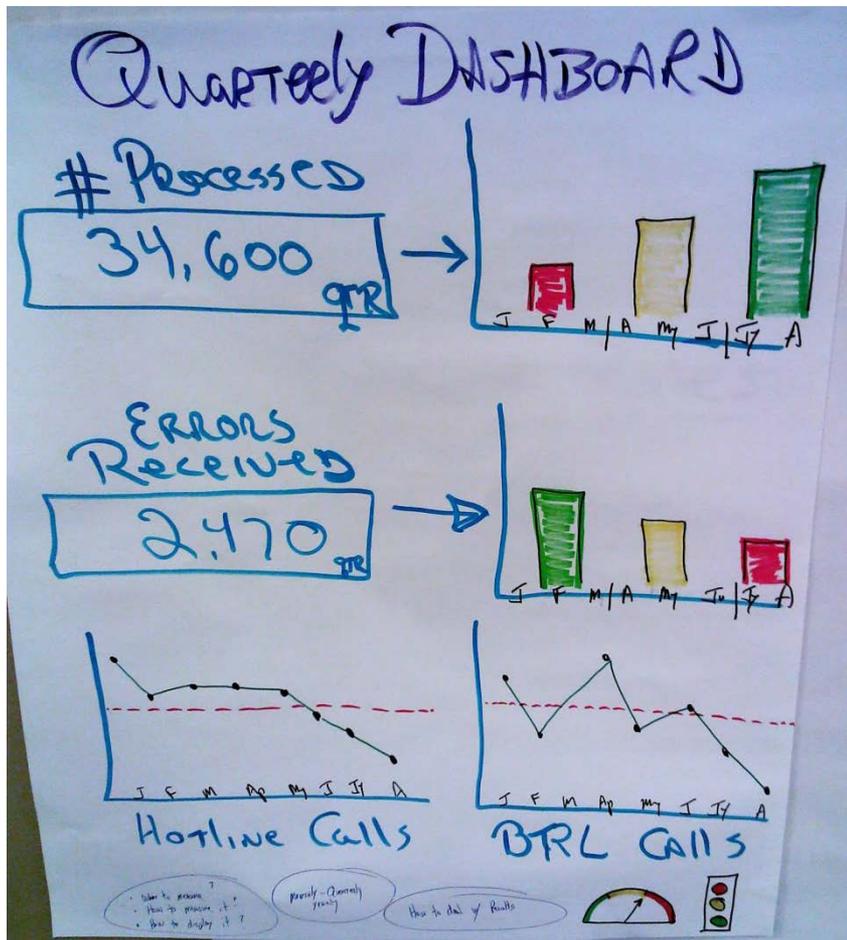
# ACTION REGISTER: TRAINING

EXTERNAL		
What	Who	When
UTILITY Co CAA PIPP + PROCEDURES REGENERATION	SUE MOSER FIELD MONITOR	REST. TRNG. SEPT.
CLIENT OUTREACH	TRAINER	THROUGHOUT THE SEASON
VIDEO PIPP UPDATE	SUSAN MOSER	3-4 mo.

INTERNAL		
What	Who	When
BETTER APP PROCESSING	NICOLET TERESA	END OF JUNE 1st JULY - START TEAM TESTING
OCEAN UPDATES	APP MGR. AND REVIEWERS	AS OCEAN GETS UPDATED
STAGNANT TRNG.	<del>REVIEWER</del> TERESA NICHOL MONITORS REVIEWERS HOTLINE PIPPERS	NEXT WEEK
OCEAN UPDATE TRAINING	TERESA RAGLAND	AS OCEAN GETS UPDATED
HOTLINE AGENCY/LETTER PROCEDURE PIPP UPDATE	TERESA MIKE	2-3 WEEKS

INTERNAL		
NEW MANAGER TRAINING	PIPP TEAM TERA! ROCHELLE	3 WKS.
INCOME TRAINING	DONNA NICHOL	MID JULY
ONLINE APPLICATION WEB TRAINING	IT Adam/CHRIS	18000.

# DASHBOARDS



## DASH BOARD

MEASURE	FREQUENCY
# OF RE-VERIFICATIONS COMPLETED SUCCESSFULLY	WEEKLY <del>MONTHLY</del>
# OF PIPP-RELATED INQ. <del>WEEKLY</del> CALLS WED	WEEKLY <del>MONTHLY</del>
TOTAL ARREARAGE CREDITS RECEIVED BY CLIENTS	QUARTERLY <del>MONTHLY</del>
DETAILED INCOMPLETE & REJECT REPORT	WEEKLY <del>MONTHLY</del>
IDENTIFY TYPES OF ERRORS REJECTION REASONS	* VIA E-MAIL & OCEAN

# COMMUNICATION PLAN

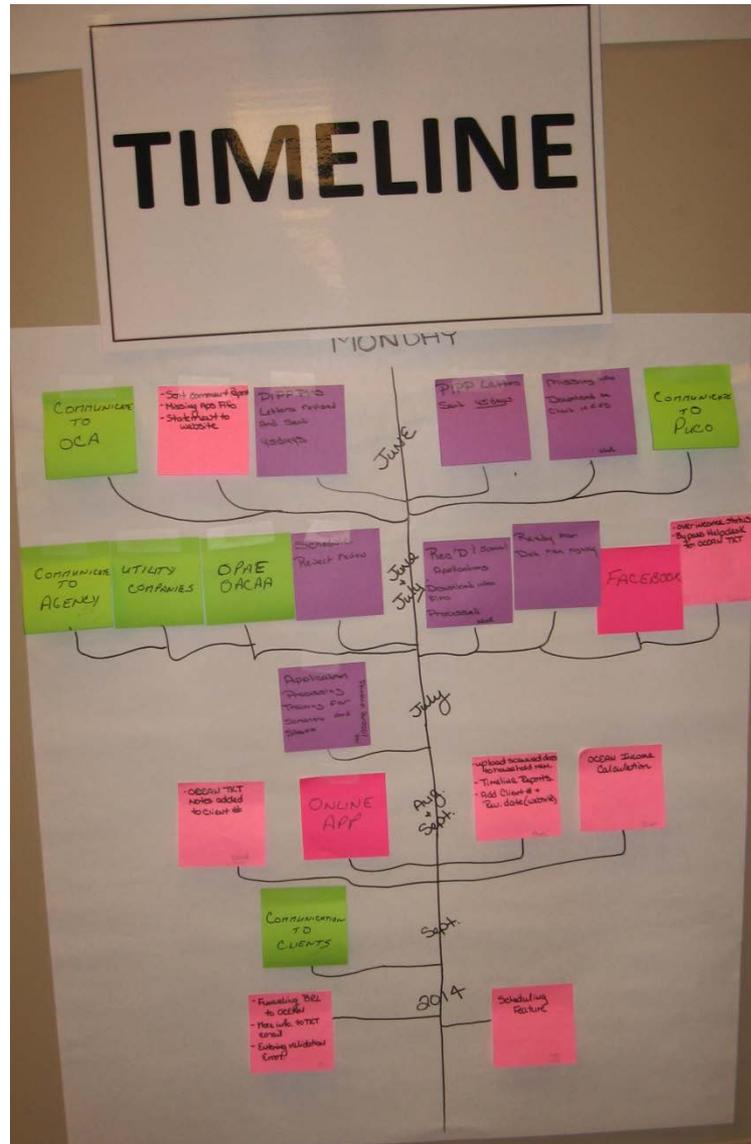
WHO
OCA Staff
Agency
Clients
PUCO
Utility Companies
OPAЕ - OACAA

WHO	WHAT	HOW	WHEN
OCA STAFF	DETAIL CHANGE'S TIME LONG WHY-KASDEN	EMAIL STAFF MTG OCEAN	1-3 WEEKS FOR EXTRA ARRANGEMENTS AS NEEDED
AGENCY	" " CHANGE AFFECTING AGENCY QUALITY OF OCA CHANGES	EU'S EMAIL OCEAN BUREAU TRANSMIT	" "
CLIENTS	PRCAL SOCIAL MEDIA AGENCY INFO	EMAIL'S SOCIAL MEDIA AGENCY	6-12 MONTHS
PUCO	DETAIL CHANGES TIME LONG INFO	UPPER MGMT MTG	1-3AY?
UTILITY COMPANIES	" "	" "	" "
OPAЕ OACAA * ETC....	" "	" "	" "

# WEBPAGE



# TIMELINE PLAN



# WHAT BEGINS MONDAY?

- Sort comment report
- Missing applications  
FIFO
- Statement to website
- PIPP Plus letters  
revised
- Communicate to OCA  
and PUCO



# SPECIAL *THANKS* TO...

## **Senior Leadership:**

- Director David Goodman

## **Sponsor:**

- Sadicka White, Karen Fabiano and Randy Hunt

## **Team Leader:**

- Susan Moser, Nichol Ross and Mike Doss

## **Subject Matter Experts:**

- Christopher Bowsher (IT), Adam Hill (IT), Steve Wheeler (IT), Whitney Sullinger (Legal), Lauren Hunter (HR),