



The Future of the Staffing Model Process

The First Question You Ask Yourself Shouldn't be
“Do I Have Enough Staff”?

it should be...

“Do I Have the Right People, Doing the
Right Work, at the Right Time?”



The Future of the Staffing Model Process

Effective staff planning and **work reallocation** is paramount to realizing increased staff efficiencies in a Needs-Based Service Center

- ▶ Client work doesn't come on a scheduled basis, it occurs when there is a client need
- ▶ There are peaks & valleys for intake & continuing work amongst the different programs
- ▶ Staff levels can be matched to client needs at the time
- ▶ Staff allocation is driven by client need
- ▶ Program needs are anticipated as part of the staffing model data input requirements



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To build the staff forecast you need the following data:

1. Current case and application volumes
2. Projected growth rate
3. Assumptions of specific task volumes based on case or application volumes
4. Handle Time assumptions by staff position by task
5. Assessment of current staffing, budgeted and on the job



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The Future of the Staffing Model Process

Step-by-Step Approach to Determine Staff Forecast

Step #1

Establish Data for the Staffing Model

- Define client needs into tasks: interviews, application processing, annual renewals, periodic reports, etc
- Define activities or tasks by channel: walk in, phone, mail, self-service
- Identify handle times for each specific task
- Identify volumes by task based on case load and application volumes
- Project volume growth based on historical growth patterns and projections for future growth

Example: Projecting Workload Volumes in a Needs- Based Service Center

Ongoing Cases by Language	English	Spanish	Russian	Other
Medi-Cal Only	63%	31%	2%	4%
Medi-Cal/ CalFresh Combo	60%	35%	3%	2%
CalFresh Only	91%	7%	1%	1%
CalWORKs	73%	22%	3%	2%
Ongoing Cases by Office- Average Jan-Dec 2011	Office 1	Office 2	Office 3	Office 4
Medi-Cal Only	10,000	797	6,375	3,985
Medi-Cal/ CalFresh Combo	9,989	651	1,737	1,303
CalFresh Only	9,000	1,901	2,376	1,426
CalWORKs	453	-	2,943.84	1,811.59
	29,441	3,349	13,433	8,525
Growth Averages				
CalWORKs	0%			
CalFresh Only	30%			
Medi-Cal	6%			

Understanding language breakdown to ensure appropriate service for all clients

Identify workload by office enables decisions regarding staff allocation

Historical case volumes and growth are used to project future volumes

Example: Projecting Workload Volumes in a Needs- Based Service Center

Intake Applications by Office- Average Jan-Dec 2011	Office 1	Office 2	Office 3	Office 4
Medi-Cal Only	128	615	154	103
Medi-Cal/ CalFresh Combo	80	583	70	70
CalFresh Only	283	2,148	339	283
CalWORKs	36	-	145	109
	527	3,346	708	564

Average applications/month with growth factors help project tasks related to applications

Intake Application Volumes by Channel Received	Mail	Walk In	BCW	Other/ Outstation
Medi-Cal Only	40%	50%	7%	3%
Medi-Cal/ CalFresh Combo	20%	65%	10%	5%
CalFresh Only	18%	63%	10%	9%
	26%	59%	9%	6%

Benchmarks for applications by channel are used to project future trends

Lobby Traffic Data	Office 1	Office 2	Office 3	Office 4
Total Walk Ins	6,120	5,678	10,980	6,789
Total Appointments	8,000	4,078	6,700	5,675
Ongoing Case Support	6,500	2,300	7,000	5,467

Lobby traffic is used as a benchmark for service provided to walk in clients



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Step-by-Step Approach to Determine Staff Reallocation

Step #2

Use input data to calculate FTE requirements

- A staffing model tool should provide the ability to calculate FTE requirements based on the association of workload volumes, handle time assumptions and staff availability
- The methodology takes into consideration vacation / sick day, average absenteeism rates and effective time
- Then present this information, with the assumptions used, in consolidated staff requirements by type, office and function



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CalFresh Only Intake Cases

Intake Assumptions	Handle Time Assumption	% of Volume	Current Volumes	FTE Required
CF Only Intake Cases			1,352	
Applications-No Shows	15 min	20%	270	0.7
Applications- Interviews FTF	50 min	30%	387	3.4
CaWIN/MEDS Alerts/MEDS Review			-	
Review out of State/Out of County benefits received			-	
Issuing EBT Card (CWEA/RFA)				
Organize and Complete Case Comments				
Applications- Interviews by phone	40 min	50%		
CaWIN/MEDS Alerts/MEDS Review				
Review out of State/Out of County benefits received				
Issuing EBT Card (CWEA/RFA)				
Organize and Complete Case Comments				
Applications-Processing and Follow up	30 min	100%		
SAVE Reports				
Issuing EBT Card(CWEA/RFA)/BIC				
Referrals-Felon/Follow -up				
Verifications/forms received from phone intake				
Intake Other Tasks	15 min	75%		

CaWORKs Eligibility				CalFresh Only Cases					
Walk In Assumptions	Handle Time Assumption	% of Volume	Projected Volumes	FTE Required	Handle Time Assumption	% of Volume	Projected Volumes	FTE Required	
CW Intake + Ongoing Cases/Month				13,275	CF Only Intake & Ongoing Cases				14,356
Projected Walk In Volume/Month				3,018	Projected Walk In Volume/Month				3,264
Eligibility Service at the Window	15	27%	806	2.0	15	27%	872	2.2	
Call Handling Assumptions					Call Handling Assumptions				
Call assumptions based on current call volume and assumes adequate trunking					Call assumptions based on current call volume and assumes adequate trunking				
Calls/Case Ratio				0.17	Calls/Case Ratio				0.17
Calls/App Ratio				0.45	Calls/App Ratio				.45
2,071				2,071	2,556				2,556
493				493	608				608
Intake Informational	5 min	75%	369.56	0.3	75%	456.30	0.4		
			13%			16%			
Intake- Application	45 min	25%	123	0.9	25%	152.10	1.1		
			13%			16%			
Ongoing Cases	15 min	100%	2,071	5.1	100%	2,556	6.6		
			7%			9%			
				6.3					8.1
Projected Call Volume					Projected Call Volume				
Intake				3,753	Intake				3,753
Ongoing Cases (assumes .17				29,095	Ongoing Cases (assumes .17				29,095
calls/case due to limited roll out				32,848	calls/case due to limited roll out				32,848



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Step-by-Step Approach to Determine Staff Reallocation

Step #3

Review Staffing Model Results

- FTE requirements for each task type will be identified for eligibility work and clerical functions
- Apply growth assumptions to final FTE requirements
- Recognition of staff capacity (gaps, overages) so task distribution levels can be reallocated to staff
- Present data by office, function, supervisor units
- Include current staff vs projected staff



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	CalWORKs Cases	CalFresh Only Cases	Medi-Cal and MC ACA Combo Cases	GA Cases	Total	
Walk In Eligibility Service	2	2.2	29.5	1.1	35	
Intake Informational Calls	0.3	0.4	1.4	0.3		
Intake- Application Calls	0.9	1.1	4.1	0.9		
Ongoing Cases Calls	5.1	6.6	58.8	2.9		
Total Call Handling	6.3	8.1	64.3	4.1	83	August Call Center plan did not include Application calls
Intake Total	28.7	16.8	124.9	24.9	195	
Total Eligibility Requirements	37	27.1	218.7	30.1	313	Current Staff (Intake + Call Center) 282

Shrinkage Assumptions
 Training & Meeting Hours/Week 3 hours
 Vacation Days/Year 17
 Paid Holidays/Year 13.5
 Unplanned Absent Days/Year 14
Efficiency Factor 90%



The Future of the Staffing Model Process

Using the Staffing Model process in the pre-launch phase you will be able to:

- ▶ Forecast work volume (calls, tasks by task type) by program and by month
- ▶ Forecast staff requirements by function (phone, case maintenance, clerical and supervisor)
- ▶ Forecast client activity by channel (walk in, mail, phone, BCW, C4Yourself)



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Using the Staffing Model for ongoing operations results you can:

1. Track forecasted volumes against actual volumes for trending purposes
2. Manage priorities by allocating staff to highest priority tasks
3. Target improvement opportunities
4. Flexibly project staff for the ongoing operations of a Needs-Based Service Center
5. Set appropriate service level goals
 - If you have enough available staff resources, you will meet your customer service goals
 - If you don't have enough available staff resources, you will not meet your customer service goals



The Future of the Staffing Model Process

- ▶ Staffing Model wish list.....