



Optimizing workload management: Human Services Perspective

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Abstract: This paper delves into the crucial topic of optimizing workload management systems in the human services industry. It addresses key challenges such as the lack of an integrated system, backlog management, complexity, and task prioritization. The paper offers practical recommendations, including prioritizing backlogged work, leveraging unified data platforms, harnessing business intelligence tools for informed decision-making, and utilizing business process intelligence tools to streamline operations. By implementing these recommendations, social agencies can significantly enhance efficiency, improve decision-making processes, and ultimately achieve better outcomes in workload management.

Keywords: Workload Management, Unified data platform, Centralized client data, Business intelligence, Business process mining.

Introduction

Social agencies play a vital role in supporting the vulnerable population. By implementing effective work management processes and leveraging technologies, these agencies can deliver timely and essential support to those in need.

Social agencies encounter various challenges while managing their workload, including:

- Lack of integrated systems
- Backlog Management
- Complexity and Prioritization of tasks
- Task Expediting

This paper not only outlines the challenges associated with workload management in Human services but also proposes robust solutions to overcome these challenges. If implemented, these solutions can significantly improve the efficiency and effectiveness of social agencies, providing a sense of reassurance to the professionals in the field.

Challenges

A. Lack of integrated systems

Social agencies are managing fragmented data and communication channels with manual power, which may not be efficient in today's era of technology. Fragmented data and communication channels refer to situations where information is scattered across multiple systems, platforms, or departments within an organization, leading to inefficiencies, errors, and difficulties in accessing and sharing critical data. This fragmentation can arise for various reasons, including legacy systems, lack of interoperability between software solutions, and inconsistent data management practices. Activity is often done in a system of record, but the task is open in the workload management system. Agencies have to bulk delete the tasks as the work is already done, but systems or modules are not in sync.



This impacts communication and quality service delivery. It may cause duplication or waste of effort. The manual effort required to keep the system in sync consumes valuable productive hours for caseworkers that could otherwise be dedicated to essential case-processing activities. The diversion of focus hinders caseworkers' ability to resolve the cases within the system efficiently and creates room for error.

B. Backlog Management

The workload volume in health and human services agencies varies based on the socioeconomic landscape in which they operate, making it challenging to hire and train caseworkers to serve the fluctuating population efficiently.

Delays in application processing and benefit delivery can cause non-compliance with federal regulations. For instance, the agency needs to process SNAP applications in 30 days. Non-compliance can result in financial penalties.

C. Complexity and Prioritization

The workload comprises diverse tasks and service demands. For instance, one client may have requested the SNAP program, and another might have requested SNAP, TANF, and Medicaid, and another submitted income documents to support the eligibility determination. The caseworkers' skill sets will vary to process such diverse tasks.

Work must be channelized based on required expertise and prioritization.

D. Expediting Task completion

The ability to promptly monitor and prioritize tasks based on their level of urgency becomes crucial. For instance, consider a scenario where an application has been submitted but has become overdue due to an existing backlog.

Social workers often encounter the challenge of efficiently tracking these overdue tasks amidst their other responsibilities. This requires a proactive approach to expediting tasks based on the deadline and complexity.

Solution

A. Unified Data Platform

Implementing a Unified Data Platform can bring significant benefits to social agencies. It can enable them to integrate data effectively and better understand their clients' journeys. By integrating data from various systems and sources, social agencies can create a unified view of their clients' information, interactions, and history.

Additionally, these platforms can enhance fraud management efforts. Social agencies are often targeted by fraudulent activities, such as identity theft, benefit fraud, and misuse of services. Unified Data Platforms can strengthen fraud management efforts by enabling agencies to detect suspicious patterns, anomalies, and inconsistencies in the data.

The private sector is investing big in data centralization. "Venture capital money is pouring into the CDP category (reaching \$2.4 billion in the last half of 2019), and established companies are buying up CDPs at a fast pace." Source: The Customer data platform report.

The public sector needs to open up for better data management, at least within an agency. A unified data platform offers more benefits than this paper covers.

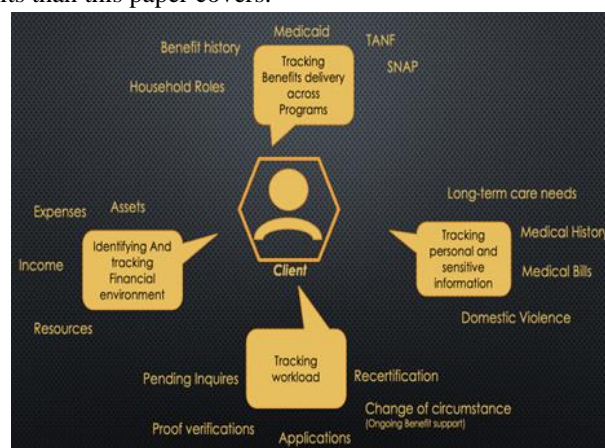


Fig 1: Centralized view of the client



B. Backlog Management

Strategic management of backlogged work is a key aspect of efficient workload management. Social agencies can clear the backlog more effectively by identifying a special task force to work on it, while regular staff continue to handle new incoming tasks. It is crucial that new work is not added to the backlog, and the workload management system should support synergies between tasks.

The workload management system should support synergies between tasks. For example, if a client and his/her household have multiple tasks open across programs, then the System should allow all the caseworkers with the required skills to claim all the tasks for that client/household.

Setting clear deadlines and monitoring the progress is critical to managing the backlog. Deadlines provide direction, prioritize tasks, and drive accountability. Regular progress monitoring ensures tasks stay on track and helps identify bottlenecks early for timely resolution.

Human services agencies can gain valuable insights into operational efficiency by harnessing the power of data analytics, reporting tools, and data visualization techniques.

Also, utilizing business process mining tools and techniques can facilitate the identification of the root causes behind the backlog. For example, determining whether it is a system issue, a client, or other factors caused the delay.

Workflow management analysis and process improvement helped the Multicampus health system eliminate wasted time and enhance communication, achieving a \$48 million improvement in operations.

C. Complexity and Prioritization Techniques

Developing task classification frameworks is crucial for efficiently managing various tasks that deliver social benefits. Tasks such as processing applications, verifying supporting documents for applications, recertification, handling changes in circumstances, and more can be part of the process.

Assigning tasks based on their priority, complexity, and risk associated with the case is essential to ensure that the work is allocated to individuals with matching skills and expertise. By categorizing tasks according to these criteria, organizations can streamline their workflows, optimize resource allocation, and enhance the overall effectiveness of their social benefit delivery processes.

Furthermore, a well-defined task classification framework can help set clear expectations, improve accountability, and ensure the most suitable personnel handles each task. This approach increases operational efficiency and significantly enhances the quality and timeliness of service delivery to our beneficiaries, providing them with the reassurance and confidence they deserve.

D. Task Expediency Solutions

Task priority can change with time. For instance, a SNAP application may be of medium priority on the day it is received but by the 25th day, i.e., five days before the federal timeline. SNAP application task priority should increase to high. The task management system should have the feature to expedite the task if the task is not resolved within the set timeline.

Conclusion

In conclusion, optimizing workload management systems is crucial for enhancing human services efficiency and productivity. Social agencies can successfully overcome workload challenges by implementing effective strategies such as backlog management, integration with unified data platforms, utilization of business intelligence tools, and leveraging business process intelligence tools.

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