going big with human-centered redesign

a readiness guide for state and local public benefits agencies looking to transform residents' application, renewal, and correspondence experience by implementing large-scale improvements

A guide from Civilla and the Beeck Center for
Social Impact + Innovation at Georgetown University

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about this guide

Redesigning benefits applications, renewals, and correspondence using human-centered design is one of the most impactful things state and local government agencies can do to ensure that all eligible residents can access social safety net resources. As part of that process, seeking out and applying user insights can make benefits delivery processes shorter, simpler, and easier to navigate for residents and caseworkers alike. For example, by taking a human-centered approach to <u>redesigning the application process</u> for its largest benefits programs, the Michigan Department of Health and Human Services (MDHHS) slashed its form length by 80 percent, reduced application completion time by more than 50 percent, and cut caseworker processing time in half.

If you are a director or staff member at a state or local benefits agency considering a comprehensive redesign of your benefits delivery processes, this guide is for you.

To help you prepare for redesign, this guide provides practical insights including:

→ **The types of redesign you could take on** based on the problem areas you're trying to address

→ **Examples of large-scale redesigns** for applications, renewals, and correspondence that have been successfully implemented

→ **Conditions and resources needed for each redesign** approach, including checklists to help you assess your readiness

→ **Guidance on paths forward** to help you get started with your agency's redesign project

getting started with redesign

types of redesign

In this guide, we'll focus on the following three opportunities for human-centered redesign:

Applications
Redesigning benefit program enrollment forms and processes

Renewals
Redesigning benefit program recertification forms and processes

Correspondence
Redesigning notices, letters, and other communications for benefit programs

Within each of these categories, there are a range of different possibilities for redesign. The type of project you take on will depend on the problem areas you're trying to solve and the resources available to support your effort.

understanding problem areas

One of the first steps you'll want to take in your redesign is identifying problematic areas across applications, renewals, and/or correspondence. Contextualize these issues by spending time with core users (benefits recipients and applicants as well as frontline staff) to understand their experiences and needs.

A few ways to do this include:

→ **Analyze baseline data** to identify potential issues and gaps—such as enrollment and renewal rates, reasons for application and renewal failure, application and renewal processing time, form lengths and time to complete, volume and reasons for calls, field office lobby visits, etc.

→ **Observe frontline staff** processing benefit program applications and renewals, residents filling out application and renewal forms, and resident and staff interactions at field offices.

→ **Connect with key informants** such as benefit program administrators, field office managers, and community organization staff who can provide insight on problem areas.

→ **Interview residents and frontline staff** such as caseworkers, lobby staff, registration clerks, and call center staff about their experiences with applications, renewals, and correspondence.

→ **Complete application and renewal forms yourself** and read through correspondences to gain first-hand familiarity with the processes.

→ **Create a journey map** of benefit applicant, benefit recipient, and caseworker experiences with applications, renewals, and correspondence.

→ **You may want to consider hiring a human-centered design organization** that can help you drive these processes and create documentation to support the current experiences and envision a new future. It will be important that members of your team work closely with and participate in any vendor work.
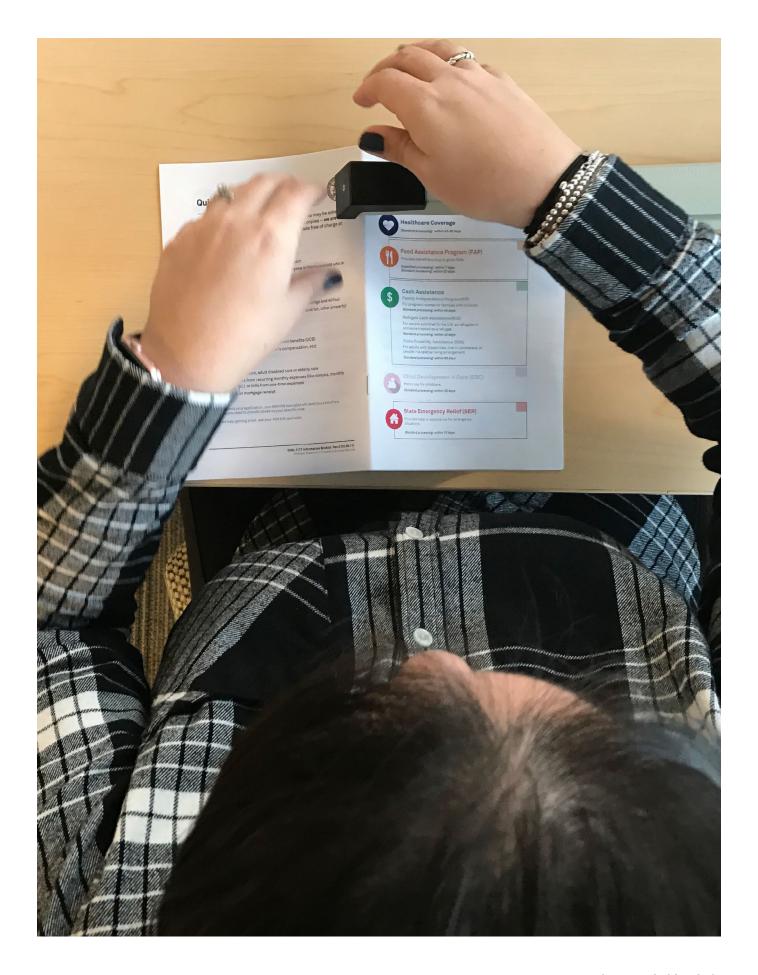
Check out 18F's Methods for human-centered design and Code for America's Qualitative Research Practice Guide for best practices on conducting discovery research. For a primer on user research methods and real-life examples from Michigan and Missouri, head to Civilla Practica to access online courses on human-centered design and user research.

scoping your redesign effort

Once you've surfaced problem areas, you can begin brainstorming possible solutions with core users (residents and frontline staff) and key stakeholders. As part of this process, you'll want to think about your agency's capacity to effectively design and implement change.

Large-scale redesign efforts can significantly benefit applicants and benefit recipients, frontline staff, and government agencies, but they require substantial resources to bring to life. The next sections will provide an overview of what large-scale redesign projects look like. They will also help determine the right size and scope for your initiative based on the resources and conditions that exist within your agency.

Using the readiness checklist to assess whether you're prepared to take on such efforts and identify specific areas to address as you prepare will set you up for success on an ambitious journey. If you find that your organization is not yet ready to take on a comprehensive effort, check out our companion small-scale redesign guide for insights and ideas for more approachable projects.

large-scale redesign

Large-scale redesign efforts have the potential to catalyze big changes at the systems level that positively impact residents, frontline staff, and government agencies.

While your redesign initiative will be unique to your agency, below are examples of how the Michigan Department of Health and Human Services (MDHHS) is transforming social safety net benefits delivery through human-centered redesign.

Applications

In 2018, the MDHHS launched a <u>redesigned benefits application</u> which integrated the state's largest public assistance programs—including healthcare, food assistance, cash assistance, child development and care, and state emergency relief—for 2.5 million residents across the state into <u>one form</u>.

Previously the longest public benefits application in the U.S., the combined forms across these five programs totaled 64 pages, 1,000 questions, and 18,000 words. Complex and vague language found in the forms could be overly confusing, and questions were often repeated across multiple forms or phrased in a way that made residents feel interrogated. For frontline staff, incomplete or inaccurate forms translated to substantial energy correcting errors, resulting in an average processing time of 50 minutes per application.

The redesigned application form removed redundant questions, streamlined content, and made forms more accessible by employing best practices in visual design and plain language. Caseworker interview scripts were also standardized and updated with questions for complex cases no longer covered in the application form.
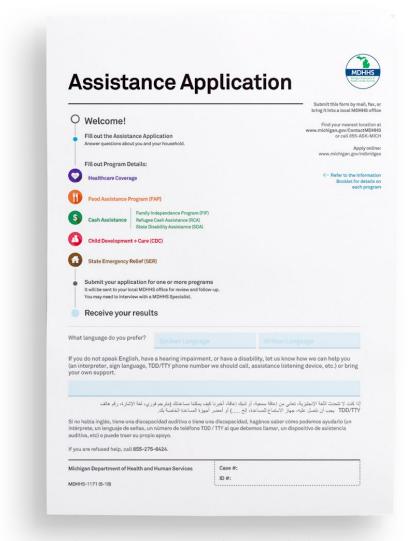
To make sure changes were adopted and sustained, the agency used a peer training model to train 5,000 frontline staff across more than 100 offices on redesigned forms and processes and foster a sense of ownership among staff who would be implementing the changes. They also trained more than 3,000 staff from 600 community partner organizations who support residents with benefits program enrollment.

The application redesign effort has:

→ **Slashed application length** by 80%, with a majority of residents able to complete the streamlined application in under 20 minutes;

→ **Improved application completeness** by more than 20%;

→ **Cut caseworker time** spent correcting errors by 75%; and

→ **Halved processing time** for caseworkers.

On the heels of this initial success, MDHHS has since rolled out a modernized online enrollment and case management portal which enables residents to easily manage their benefits from their mobile phones with similarly impactful results.

The agency has also made policy and process changes to enable same-day benefits determinations, saving time for residents and caseworkers and reducing procedural denials due to inaccurate or incomplete applications.

The first page of the MDHHS assistance application

Renewals

Residents enrolled in public assistance programs must go through a renewal process at least once per year to keep their benefits.

For residents, undelivered forms, complex directions and questions, and unclear due dates create a burdensome experience at best. At worst, these barriers can result in residents losing their benefits due to errors or failing to submit their forms on time.

These challenges have a direct impact on frontline staff, who must spend significant time providing guidance to residents in field offices and over the phone, correcting errors and tracking down missing information on forms, and processing new applications from residents who churned off the program and must reapply.

To address these pain points, MDHHS redesigned renewal forms and implemented them statewide in 2020, integrating renewals for healthcare, food assistance, cash assistance, and child care programs. Residents complete one core form, along with short supplements for specific programs. Similar to applications, renewal forms were redesigned to reduce length, simplify language, and highlight key information, due dates, and next steps.

To further streamline the process, forms come pre-filled with information from residents' case files, and the agency has enabled automatic verification using relevant existing documentation.

Data from the pilot found that redesign:

→ **Increased renewal submissions** by 12%;

→ **Increased renewal forms submitted on time** from 75% to 95%;

→ **Cut resident errors** on renewal forms by 60%;

→ **Decreased lobby visits** for renewals by 50%;

→ **Saved caseworkers** a combined 200,000 hours per year; and

→ **Improved successful renewals** by 15%.

MDHHS OFFICE
101 MICHIGAN STREET
ANYTOWN, MI 48123

Case Name: **Jane Doe**
Case Number: **0123456**
Date: **11/1/2021**
MDHHS Office: **Any County**

Specialist: **C. Ivilla**
Phone: **(123) 123-4567**
Fax: **(123) 321-7654**
Specialist ID: **civilla**

Redetermination

Renew your benefits

JANE DOE
1234 WAY LANE
ANYTOWN, MI 48123

Full legal name:
Jane Doe

Your due date:
October 23, 2021

Your benefits will end if you do not submit the form for: Food Assistance

Here's what you need to do:

1. **Answer** the questions on the form.

2. **Sign and date** the form at the bottom of page 4.

3. **Send the form** to us by 10/23/2021. Don't wait!
   - **Submit online** at michigan.gov/mibridges
   - **Mail your form** in the envelope we sent you
   - **Turn in your form** at your local MDHHS office

You're required to have an interview with a MDHHS specialist, unless you are renewing for Healthcare or Childcare (CDC).

Type of interview:	Interview date and time:	Appointment location:
Phone	9:00am on 11/1/21	N/A

A MDHHS specialist will contact you if you are scheduled for a telephone interview. You are responsible for calling your specialist before your interview date if you need to reschedule or would like an in-person interview. If you do not keep your appointment, submit your completed form and submit all required proofs by the due date your benefits may be expired, canceled, delayed, or reduced.

Your Food Assistance Program (FAP) benefits will end on 11/30. You must submit your redetermination form or filing form by 11/15/21 in order to receive uninterrupted FAP benefits.

If you need help, contact your local office before your due date.

Michigan Department of Health and Human Services

MDHHS-1010 (Rev. 4-20)

Send these proofs

Please provide proof of all __income__ for your household and any changes you write down. Some examples include:

Income (Last 30 Days)

Employment Income
- Pay stubs
- Employer statement

Stopped/Started/Changed
- Employer statement

Additional Income
- Pension
- Child support

Self-Employment Income & Expenses
- Tax return
- Expense receipts
- DHS-431

Assets

Proof of Current Assets
- Bank statements
- Property deeds
- Copy of Direct Express card & ATM receipt

← Not required for Child Care (CDC) or Healthcare (unless on a deductible, older than 64, disabled or in need of long-term care services)

Only required for FAP and Cash if requested

Expenses (Last 30 Days)

← Not required for Child Care (CDC)

Proof of Expenses
- Proof of rent/mortgage
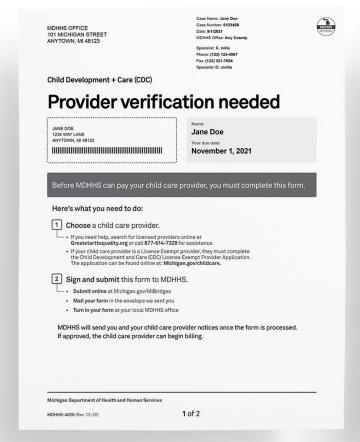- Utility bills
- Child support

How to submit

Submit proofs online (**michigan.gov/mibridges**), by mail, or turn them in at your local MDHHS office. When you submit documents provide copies - we are not able to return original documents.
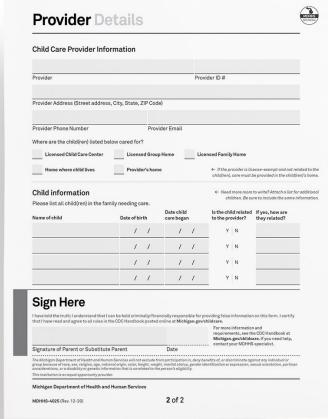
If you need help getting proof, contact your local office.

The cover page and proofs page from the redesigned MDHHS recertification form

Correspondence

Building on the momentum from applications and renewals, MDHHS has directed its energy toward addressing another pain point for residents and frontline staff: correspondence.

The notices and letters that Michigan sends to inform residents about benefits updates and actions are often hard to understand for the people receiving them. Institutional language and poorly designed correspondence (e.g., notices that are long and dense, use complex legal language, unclear due dates, etc.) can result in people missing important actions on their case or needing to seek assistance through lobby visits and calls, all of which create avoidable burdens for frontline staff. Poorly designed correspondence also impedes trust with residents.

Pages from a redesigned MDHHS verification request form

In 2021, MDHHS began redesigning correspondence for 15 core notices, including verification requests, appointments, and case actions letters across the agency's largest benefits programs. The redesign has focused on making notices more accessible, understandable, actionable, and transparent. Changes include simplifying language and clarifying instructions, restructuring notices so that the most relevant information for residents comes first, and using visual design to make the content more approachable while drawing attention to due dates and actions.

Feedback from user testing is promising. Residents report feeling that redesigned notices are clearer and more inviting, help them better understand what they need to do and take immediate action on, and strengthen their trust with MDHHS.

During user testing, one resident noted, "It makes me feel like they actually took the time to review my file before sending me this form." A caseworker exclaimed, "This is awesome! I can see less phone calls already!"

Large-scale, human-centered redesign provides a transferable model across different states and agencies. While MDHHS is an exemplar, several other state and local agencies around the country are adopting this model with similar outcomes.

The **Missouri Department of Social Services** is currently implementing a large-scale redesign for applications, renewals, and correspondence across its largest benefits programs. The new designs build off of the Michigan work and are seeing similar success. During user testing interviews, residents noted that the new forms felt more "approachable" and less "dehumanizing." One frontline worker explained, "I like that this [application] is shorter. It's very simple and has all of the questions we need to make a determination." Another worker shared, "We ask so many questions [on the current renewal form] that have nothing to do with a determination and it's like, 'why are we asking [participants] these things? It just makes things harder for everyone.'"

readiness checklist

The following checklist includes conditions and resources that underpin a successful large-scale redesign initiative, based on previous efforts that have been implemented in other states.

We encourage you to use this checklist to assess your agency's readiness to take on a large-scale redesign and identify specific areas to address as you prepare.
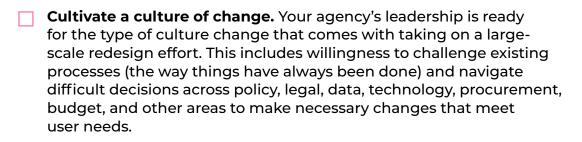
Project Leadership + Operations
Large-scale redesign must be a top priority for the agency, otherwise the project risks being de-prioritized by inertia, competing agendas, and other roadblocks that will inevitably come up

At-a-Glance Checklist

☐ **Assign a dedicated leadership and core team,** which should include:

→ Department heads that oversee the eligibility and enrollment for benefit programs;

→ Project lead with decision-making authority and ability to coordinate with leadership and across departments within the agency;

→ Core team that includes members such as researcher, graphic designer, policy analyst, legal, etc. dedicated to this redesign; and

→ Specialists available for consultation as needed.

☐ **Ensure your procurement process is updated** to identify partners or vendors with the appropriate design/development experience, if applicable.

☐ **Source necessary funding** to take on a large-scale redesign project.

☐ **Cultivate a culture of change** to rethink existing processes and navigate difficult policy decisions.

☐ **Engage internal and external stakeholders** to align on priorities and goals for the redesign.

Detailed Checklist

☐ **Assign a dedicated leadership and core team.** Your agency/ department has established leadership and a core team committed to seeing the project through from start to finish.

    ☐ Directors and deputies of departments that oversee eligibility and enrollment for benefit programs are fully bought-in on redesign. As project sponsors, they can help secure stakeholder buy-in and unblock institutional obstacles.

    ☐ The project lead reports directly to director-level leadership and has capacity to dedicate at least 50 percent, if not more, of their time to redesign. This person is capable of setting a vision, advocating for prioritizing user voices in decision making, and integrating processes and requirements across policy, legal, data, technology, and business. They are trusted and can navigate dynamics across all levels of the agency (from leadership to frontline staff), and have authority to remove barriers along the way through executive decision making.

    ☐ You have established a core team with the skills and capacity to take on redesign. This includes a user researcher/service designer, graphic designer, policy analyst, legal counsel, data analyst, technical specialist, communication specialist, and training specialist. These individuals should serve as liaisons to the agency's wider policy, legal, and technical teams.

    ☐ You have a group of specialists on staff who are able to dedicate time and energy to the project as needed. This includes frontline staff, policy analysts, technical specialists, business process specialists, and translators.

☐ **Ensure your procurement process is updated.** If you are planning to bring in outside support for redesign, the agency's procurement process is set up to identify the right vendor/partner. This includes the ability to assess human-centered design capacity and agile software development experience with modern government, and developing RFPs/RFIs accordingly.

☐ **Source necessary funding.** You have the funding to take on a large-scale redesign project and sustain newly redesigned forms, technology changes, and processes once they are implemented. This might come from federal matching funds, state budget, foundation support, or other sources.

☐ **Cultivate a culture of change.** Your agency's leadership is ready for the type of culture change that comes with taking on a large-scale redesign effort. This includes willingness to challenge existing processes (the way things have always been done) and navigate difficult decisions across policy, legal, data, technology, procurement, budget, and other areas to make necessary changes that meet user needs.

☐ **Engage internal and external stakeholders.** You are prepared to engage internal and external stakeholders—including residents, frontline staff, community partner organizations, unions, legislature, other state agencies, and federal agencies (USDA Food and Nutrition Service (FNS), U.S. Centers for Medicare & Medicaid Services (CMS), etc.). You understand stakeholders' motivations and priorities, where you might encounter resistance, and how to align them around a shared vision for the project.

User Research + Design

In order to keep the experiences of residents and frontline staff at the center of your redesign efforts, it's important to incorporate user input throughout all stages of the project—including during discovery research, designing and testing, piloting, and implementation. This will ensure you're tackling the right problem and prioritizing user voices in decision making.

At-a-Glance Checklist

☐ **Recruit the appropriate people to participate in user research,** such as core users and key informants.

☐ **Train team members involved in user research.**

☐ **Establish a process for securely storing user research data** that adheres to user confidentiality agreements.

☐ **Communicate the workflow for redesigning existing forms.**

☐ **Prototype and test the redesign.**

☐ **Secure translation resources** for applications, renewals, and/or correspondence, if applicable.

Detailed Checklist

☐ **Recruit the appropriate people to participate in user research.** You have the ability to recruit people to participate in user research. You'll want to consider engaging core users—such as residents, caseworkers, lobby staff, and call center staff—as well as key informants—such as community partners and advocacy organizations. You'll want to ensure that people who participate in research are diverse and representative of the range of users who access your benefit programs.

☐ **Train team members involved in user research.** You are able to train team members involved in user research on how to conduct user interviews, user testing sessions, observations, and site visits. You will also train them on how to analyze data and identify patterns to make informed decisions.

☐ **Establish a process for securely storing user research data.** You have processes in place to store user research data in a way that maintains user confidentiality and complies with privacy and security regulations.

☐ **Communicate the workflow for redesigning existing forms.** Your team understands the current process for making changes to existing forms and either has the authority to make decisions or can work with decision makers to go through redesign. This includes having the ability to reimagine how things are done and change agency processes.

☐ **Prototype and test the redesign.** Your team has the ability to prototype and test new design ideas and solutions. This includes having the resources to do 3-4 rounds of user testing per component.

☐ **Secure translation resources.** If you plan to translate applications, renewals, and/or correspondence, start with forms and notices that already come in other languages. You will need native speakers to translate and review materials for accuracy and readability.

Policy

Change can create conflict with stakeholders who have valid reasons for the way things have been done to date. Get your legal and policy teams on board with human-centered redesign from the start so that they can partner with you to create new forms and processes that center people's experiences and meet laws and regulations.

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At-a-Glance Checklist

☐ **Collaborate with legal and policy team(s)** to ensure that language on required forms and notices complies with applicable federal, state, and departmental laws and policies.

☐ **Connect with federal agencies and national policy research centers and nonprofits** for additional outside guidance.

☐ **Consult with the policy team for necessary policy manual revisions** to standardize practices and interpretations among various jurisdictions.

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Detailed Checklist

☐ **Collaborate with legal and policy team(s).** Your legal and policy team—or teams, if there are separate teams for different benefit programs—has a strong understanding of relevant federal, state, and departmental laws and policies. They are also open and empowered to make decisions about where there is room for interpretation with policy implementation, including what information and language is required on forms and notices, and what can be rephrased, removed, or collected in other ways.

☐ **Connect with national-scale resources.** You are able to connect with federal agencies (FNS, CMS, etc.) and national policy research centers and nonprofits that can provide outside guidance on how other states interpret and implement policy.

☐ **Consult with the policy team for necessary policy manual revisions.** Your policy team has the ability to revise policy manuals to standardize practices and interpretations among county and field offices across the state. Manuals should use plain language and include examples of varied implementation as appropriate.

Technical Implementation

Your technology systems are what make it possible to implement redesign. You'll want to think about technical implementation early, as it can be a place where projects get bogged down, especially depending on the complexity of your data and engineering needs and how your existing systems are set up—for example, whether systems are modern and flexible or static; if data is housed across multiple systems; and whether you need to build, change, or integrate systems.

At-a-Glance Checklist

- [ ] **Establish a process for updating the online benefits website/portal** to reflect redesign.

- [ ] **Establish a process for updating the correspondence management system** to reflect revisions to current forms and notices, and include new forms and notices.

- [ ] **Integrate existing backend case management systems and/or document storage** to enable sharing in multiple systems.

- [ ] **Ensure that you can update case management systems** to remove unnecessary data entry fields.

- [ ] **Set up systems to generate reports that surface relevant outcomes data.**

- [ ] **Set up processes to comply with data privacy and security regulations.**

- [ ] **Establish a process for ongoing systems maintenance and protocols.**

Detailed Checklist

- [ ] **Establish a process for updating the online benefits website/portal.** You have the ability to update the online benefits website/portal so that online applications and renewals reflect new language, question structure, and other changes. Consider a full redesign of the website/portal if it is not already mobile-friendly, or if it doesn't currently function in a way that allows residents to manage their full case online (uploading documents, reporting changes, viewing letters, etc.).

- [ ] **Establish a process for updating the correspondence management system.** You are able to make changes to your correspondence management system to integrate new forms and notices, remove unnecessary form fields, and pre-fill form fields. For renewal forms, the correspondence management system can be updated to collate core forms with relevant supplements.

☐ **Integrate existing backend case management systems and/or document storage.** Your existing backend case management systems are integrated so data can be shared across benefits programs. If this isn't feasible, you are able to integrate document storage so forms can be viewed in multiple systems.

☐ **Ensure that you can update case management systems.** You can make updates to case management systems to remove data entry fields that aren't necessary for frontline staff to make application or renewal determinations.

☐ **Set up reporting systems.** Your systems are set up to generate reports that surface relevant outcomes data. See the evaluation section for examples of impact metrics.

☐ **Set up compliance processes.** You have processes in place to comply with data privacy and security regulations. This includes securing relevant approvals for data sharing and use, if necessary.

☐ **Establish a process for ongoing systems maintenance and protocols.** You are able to establish a process for ongoing systems maintenance and protocols for escalating and resolving technical issues that arise.

Implementation

Implementation is an essential, yet often overlooked, step for successfully rolling out redesign efforts. You will need to find ways—through outreach, training, and other means—to bring stakeholders along so they can embrace and successfully implement new solutions.

At-a-Glance Checklist

☐ **Onboard frontline staff** so they are aligned with implementation and the new solutions.

☐ **Rescope roles and workflows** if necessary to accommodate the possibility of additional responsibilities due to implementation.

☐ **Update internal agency or department processes.**

☐ **Set up channels of communications with internal stakeholders.**

☐ **Commit to forming external stakeholders** who are directly impacted so they are aware of redesign and its implications.

Detailed Checklist

☐ **Onboard frontline staff.** You are committed to onboarding frontline staff so they buy into implementation and are able to adopt new solutions. This includes allocating time and resources to properly train staff, ideally using a peer training model or another proven approach.

☐ **Rescope roles and workflows.** If agency or frontline staff must take on additional responsibilities to support implementation, you have the ability to rescope roles and workflows.

☐ **Update internal agency or department processes.** If internal agency or department processes need to be updated, you have the authority to make changes or are able to work with decision makers to do so.

☐ **Set up channels of communications with internal stakeholders.** You have channels to communicate with other internal stakeholders who aren't directly impacted by redesign so they are aware of the effort. Prepare to explain the why, what, when, where, and how behind the project, as well as how it may affect them.

☐ **Commit to informing external stakeholders.** You are committed to informing external stakeholders (residents, advocates, community partners, providers, unions and workforce development organizations, etc.) so they will support redesign and are aware of any changes that may impact them. This includes developing communications materials and marketing campaigns, and conducting outreach to reach key audiences to raise awareness. It also involves directly notifying residents so they are aware of the changes, and training partner organizations that help residents apply for benefits.

Evaluation

Make sure you have a way to measure the impact of redesign on outcomes and user experiences. This is key for communicating the value of redesign to stakeholders, which can help you build momentum for expanded efforts. It also helps you identify places where you can iterate and make improvements post-launch.

At-a-Glance Checklist

☐ **Identify key impact metrics and a data collection system.**

☐ **Ensure access to data and compliance with data privacy and security regulations.**

☐ **Leverage evaluation data** to further inform and refine redesign efforts.

Detailed Checklist

☐ **Identify key impact metrics and a data collection system.** You have identified key impact metrics and have a process for collecting, assessing, and measuring data across short-term and long-term outcomes. Example metrics include: time to apply, application and renewal submissions, approval and denial rates, days to determination, completion and error rates, caseworker processing time, reasons for lobby visits and calls, etc.

☐ **Ensure access to data and compliance with data privacy and security regulations.** You have access to the data you need to evaluate impact, and you have processes in place to comply with data privacy and security regulations. If necessary, you can secure relevant approvals for data sharing and use.

☐ **Leverage evaluation data.** You are committed to leveraging evaluation data to identify gaps and inform continuous improvements to redesigned forms and processes.

Governance + Sustainability

It's important to establish a governance model so that redesign efforts are sustained long-term and not rolled back over time. To accomplish this, you'll want to build in a system of accountability and clear processes for continuously improving and expanding on redesign.

At-a-Glance Checklist

☐ **Assign an experienced team for sustaining these improvements.**

☐ **Formalize a system to identify future design opportunities.**

☐ **Create accountability structures to ensure the redesigned system is sustained.**

Detailed Checklist

☐ **Assign an experienced team for sustaining these improvements.**
You are able to appoint a team that will be responsible for sustaining changes and overseeing continuous improvement.

  ☐ These individuals should have the training, skills, and capacity to take on these roles. Examples of skillsets needed include: user researcher/ service designer, graphic designer, technical specialist, policy analyst, and legal counsel.

  ☐ If you are planning to bring in an outside partner/vendor for redesign, there is a clear transition plan that includes upskilling the agency team members who will be responsible for sustaining changes moving forward.

  ☐ There should be one person who reports directly to director-level leadership with the authority to remove obstacles and make final decisions of whether or not to implement new changes.

☐ **Formalize a system to identify future design opportunities.** You are committed to developing a framework for future decisions to follow a human-centered design process. This includes how changes are submitted, vetted, user tested, approved, implemented, and evaluated. For example, creating a decision tree can provide structure for how to assess and incorporate future changes to forms. Similarly, creating a form for formally submitting change requests—that, at a minimum, asks for a description of the change, who it will impact, and the rationale behind the request—can support a process where updates are made with intention.

☐ **Create accountability structures that incorporate the redesigned system.** You are committed to creating accountability structures to ensure redesigned forms and processes are sustained. This includes, where relevant, revising metrics for performance reviews for leadership and staff to reflect changes.

Paths Forward

→ **Large-Scale Redesign**

If you've met most of the conditions in this checklist or feel confident that you can address them soon, you're likely well positioned to take on a large-scale redesign effort. Read on for an overview of the major stages of redesign and practical resources that will equip you for success.
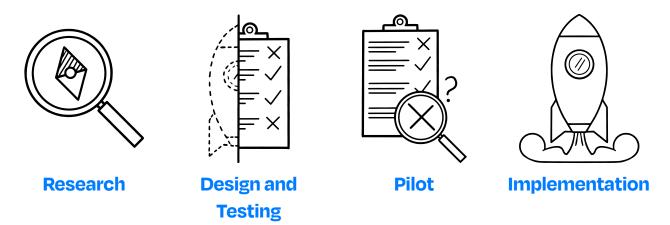
→ **Small-Scale Redesign**

If meeting the checklist conditions now or in the near future seems like a stretch, a smaller-scale redesign project might be a better fit. Our companion guide, <u>Starting Small with Human-Centered Redesign</u>, provides examples of incremental changes you can make, resources and conditions needed for each, and practical guidance to get started.

roadmap for large-scale redesign

roadmap for large-scale redesign

As you prepare to take on a large-scale, human-centered redesign effort, you'll want to plan for these four phases:

Research   **Design and Testing**   **Pilot**   **Implementation**

Research

The first step of redesign is understanding the experiences and needs of your core users (participants and frontline staff). Instead of relying on assumptions, ground your understanding of the problem and potential solutions in user interviews, direct observation, and baseline data analysis.

You should also conduct a landscape analysis to understand policy requirements, business processes, previous precedents for change (successful and unsuccessful), complementary or competing agency priorities, stakeholder and funding needs, technical requirements, and other considerations that affect your project.

Design and Testing

After you've identified potential solutions, you'll take an iterative approach to prototype, design, and test ideas, and integrate feedback on them. As a best practice, break the design process into shorter sprints where you quickly develop and get user input on components/features early and often. You should prepare for 3-4 rounds of testing per component.

By keeping users at the center of your design process, you ensure that you are designing solutions that fit their needs. This process also minimizes the risk of spending time and resources designing a solution that doesn't address the problem.

Pilot

Once you've designed and user tested your solution, it's time to pilot it in a real-world setting. Piloting your redesigned solution allows you to test it with a broader, more diverse set of users, which can help you uncover unexpected use cases, surface potential issues that need to be addressed, and pressure test the solution at scale before launch.

Implementation

Once you've piloted your solution and ironed out any remaining kinks, you can turn your sights to launch. Just as your redesign process centers on users, so too should implementation. Residents, frontline workers, and other internal and external stakeholders should be informed about changes to forms and processes. Frontline staff and community partner organizations should be fully onboarded ahead of rollout.

You should also develop a clear plan for evaluating the impact, including defining short and long-term outcomes. Check out Code for America's Safety Net Scorecard for metrics to consider. It's important to remember that implementation isn't the end-goal—sustained impact is. Establish a governance model to sustain changes over time and support continuous improvement.

Learning Paths

Ready to get started with large-scale redesign? As a next step, check out Civilla Practica on:

→ Foundations to Human-Centered Redesign

→ Design Principles: Visual and Content Design

→ Applications | Renewals | Correspondence

These free, online courses are meant to help you get your redesign effort off the ground. The self-guided courses will walk you through developing and kicking off your project, equip you with tangible skills in design and user research, and impart lessons learned from Civilla's work in Michigan and Missouri.

go forth and redesign

Redesigning applications, renewals, and correspondence to be more human-centered can have powerful effects on the lives of residents who access public benefit programs and the frontline staff who support them.

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At the federal level, the momentum behind human-centered benefits delivery has never been higher. The Biden Administration's Executive Orders on racial equity and customer service aim to ensure that the federal government reduces historic inequities and serves people better by putting their lived experience at the center of its work. In addition, the American Rescue Plan Act provides landmark funding for technology modernization, cross-government collaboration, and other infrastructure to improve benefits delivery. This heightened public support for investing in the social safety net and systems of equity makes it a perfect time for state and local government agencies to take on human-centered redesign.

We hope this guide will be used as a framework for identifying the right size and scope for your redesign project and reinforcing the limitless benefits of grounding redesign in your users' experiences. As you get started with your human-centered redesign, we encourage you to use the checklists and refer to the resources we've shared to ensure that your agency is set up for success.

get in touch

We love hearing from leaders and staff at state and local government agencies to learn about your experiences.

Feel free to reach out to us if you have questions or want to share how you're thinking about redesign to deliver a more human-centered safety net in your state.

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glossary

Applications: Forms and processes (interviews, verifications) associated with resident enrollment in public benefit programs.

Case management system: This is the electronic system, sometimes referred to as the backend system, that frontline staff use to access, update, and manage resident case files—including all data, documents, and correspondence.

Churn: When residents who are eligible for benefits lose coverage and then must go through the application process to reenter the program within a short period of time (typically less than four months). Churn results in a lapse in coverage, and occurs most frequently around interim reporting and renewal periods.

Correspondence: Notices, letters, and other agency communications sent to residents with information about benefit programs.

Correspondence management software or system: Sometimes called customer correspondence management (CCM) software, correspondence engine, or forms and mail management, this is the electronic system that manages the creating, prefilling, collating, and sending of outgoing forms, letters, and notices—electronic, paper, mail—for residents on public benefits programs.

Frontline workers/staff: Field office lobby staff, caseworkers, eligibility workers, call center staff, and other staff employed by state or local government agencies that support residents with enrolling in and maintaining public benefits.

Human-centered design/redesign: An approach to design that centers on user experiences to understand problems and develop solutions that address their needs. Iteratively prototyping and testing potential solutions with users, and continuous improvement are key tenants to the human-centered design process.

Integrated applications and renewals: A combined form that allows residents to apply for or renew multiple public benefits programs at the same time. Because residents who meet the income eligibility for one program are often eligible for other programs as well, integrated applications and renewals can help residents save time and increase their enrollment across programs for which they are eligible. Integrated applications can also streamline workload and processing time for frontline workers.

Online benefits portal: A digital or web-based site where residents can apply for and renew benefits, check and manage their case, and receive information about benefits programs in one place.

Public benefits agencies: State and local government agencies that administer public benefits programs. These often have names like Department of Health and Human Services, Department of Social Services, and Human Services Agency.

Public benefits programs: Also called social safety net benefits, means-tested public assistance, and social welfare, these are government-sponsored programs that provide cash assistance or in-kind benefits (goods, services, waivers, vouchers) to low income individuals and families. Some of the largest programs include:

- **Healthcare**: Medicaid, Children's Health Insurance Program (CHIP)

- **Food and nutrition assistance**: Supplemental Nutrition Assistance Program (SNAP), Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

- **Cash assistance**: Temporary Assistance for Needy Families (TANF), Supplemental Security Income (SSI)

Renewals: Forms and processes (interviews, verification documents, interim reporting) associated with redetermination or recertification of eligibility for public benefit programs. While requirements and timing differ by program and state, residents must typically renew at least once per year in order to keep their benefits.

Residents: Sometimes called clients or participants, these are people who are enrolled in public benefits programs or are eligible but not enrolled.

project credits

This guide was written by Katie Sullivan and Sara Soka, Social Safety Net Benefits Fellows at the Beeck Center for Social Impact + Innovation at Georgetown University, in partnership with Lena Selzer, Co-Founder and Senior Director, and Gabriela Dorantes, Design Lead, at Civilla.

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social impact + innovation

This guide is part of a larger initiative by the Beeck Center for Social Impact + Innovation at Georgetown University to document innovations in social safety net benefits delivery driven by human-centered service design, data-informed practices, and responsive technology with a goal of spreading proven practices more widely. Find other resources on human-centered design and more on the Digital Benefits Hub.

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Civilla is a nonprofit design studio dedicated to changing the way our public-serving institutions work through human-centered design.