

# starting small with human-centered redesign

**approachable ideas for state and local  
public benefits agencies to improve  
applications, renewals,  
and correspondence**

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

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# about this guide

The social safety net is an interwoven group of programs that provide residents with access to healthcare, food, and other supports during challenging periods of their lives. However, lengthy, duplicative, and complex application and renewal processes can make it difficult for residents to secure and keep those social safety net benefits. And it's not just benefits recipients who are harmed by the often burdensome benefits access materials. Cumbersome, redundant forms can beget errors and inconsistencies, which increase the processing workload for caseworkers. Human-centered design can help, though.

Human-centered design is the process of learning about users' lived experiences, needs, and wants and applying that knowledge to create different, better experiences. Typically, this involves thinking about the start-to-finish experience of benefits delivery from the perspective of residents and caseworkers. This helps everyone discover what unnecessary barriers exist so they can be removed to ensure that people of all backgrounds and abilities can navigate benefits requirements.

Confusing and inaccessible language in forms is a common barrier to success. Redesigning forms such as applications, renewals, and correspondence using a human-centered approach is one of the most high-impact things state and local government agencies can do to strengthen public benefits delivery. Your organization does not need extensive staff capacity or funding to make significant changes, either. The process of seeking out and applying user insights can happen at any scale. Even small improvements can be transformative for residents and caseworkers alike.

This guide is for you if you are:

- Interested in making benefits delivery processes shorter, simpler, and more user-friendly
- New to human-centered design or have limited resources to work with
- Looking for small projects that will allow your organization or agency to make quick incremental progress
- Curious to test and demonstrate the impact of changes for proof-of-concept toward more comprehensive future efforts.

# getting started with redesign



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+  
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(SET 3 DAYS BEFORE)

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MANY  
DIRECTION

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LOOKS  
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YOU CAN  
DO PAPER OR  
MOBILE -  
IT'S LIKE  
HOW?

PERSONAL WORK  
INFORMATION

WAYNE CO DHS HAMTRACK WOODY PLAZA  
12140 JOSEPH CAMPAU ST.  
HAMTRACK, MI 48212

Case Number:  
Date:  
MDHHS Office:  
Specialist:  
Phone:  
Fax:  
Specialist ID:

It's time to Re new!

Prepared for:  
Wentworth-Farthington

If you do not complete the following requirements, your [Food Assistance Program] benefits will end on: [May 15, 2019]

- 1 Application and proofs due [April 26, 2019]. You are required to submit a completed application and proof documents. Complete, sign, and date this Redetermination Application. Collect necessary proof documents and make photocopies of them. Submit your completed application and photocopies of proof documents by [April 26, 2019]. You may submit the forms by mail, or by fax, or by bringing them into a local MDHHS office?
- 2 Interview on [April 31, 2019 at 11:15am EDT]. You are required to have an interview with a MDHHS Specialist. Interviews are not required for Healthcare or Childcare (CDC). A specialist will call you or meet you at a local office on [April 31, 2019] within 15 minutes of [11:15am EDT]. Call your specialist (listed at the top of this page) before your interview date and time if you need to reschedule the interview.
- 3 Receive your results.

SHOULD  
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ON PHONE  
OR IN  
PERSON?

WAYNE CO DHS HAMTRACK WOODY PLAZA  
12140 JOSEPH CAMPAU ST.  
HAMTRACK, MI 48212

Case Number:  
Date:  
MDHHS Office:  
Specialist:  
Phone:  
Fax:  
Specialist ID:

### Redetermination Application

Prepared for:  
Sylvia Wentworth-Farthington

WAYNE CO DHS HAMTRACK WOODY PLAZA  
PO BOX 8123  
ROSELAND, MI 48068-8983

If you do not complete the following requirements, your [Food Assistance Program] benefits will end on: [May 15, 2019]

- 1 Application and proofs due [April 26, 2019]. You are required to submit a completed application and proof documents. Complete, sign, and date this Redetermination Application. Collect necessary proof documents and make photocopies of them. Submit your completed application and photocopies of proof documents by [April 26, 2019]. You may submit the forms by mail, or by fax, or by bringing them into a local MDHHS office?
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- 3 Receive your results.

If you need help, contact your local office before [April 26, 2019].



# 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

Learning about resident needs, iteratively prototyping and testing potential solutions, and continuous improvement are key tenets to the human-centered design process. Each of these steps require seeking an ever deeper understanding of the user experience through observation and direct feedback. To gain insights on the pain points currently faced by residents and frontline staff, you'll need to spend time with them to understand their experiences and needs. A few ways to do this include:

- **Analyzing 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.
- **Observing frontline staff** processing benefit program applications and renewals, residents filling out application and renewal forms, and resident and staff interactions at field offices.
- **Connecting with key informants** such as benefit program administrators, field office managers, and community organization staff who can provide insight on problem areas.
- **Interviewing residents and frontline staff** including caseworkers, lobby staff, registration clerks, and call center staff about their experiences with applications, renewals, and correspondence.
- **Completing application and renewal forms yourself** and read through correspondences to gain first-hand familiarity with the processes.
- **Creating a journey map** of resident and caseworker experiences with applications, renewals, and correspondence.

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

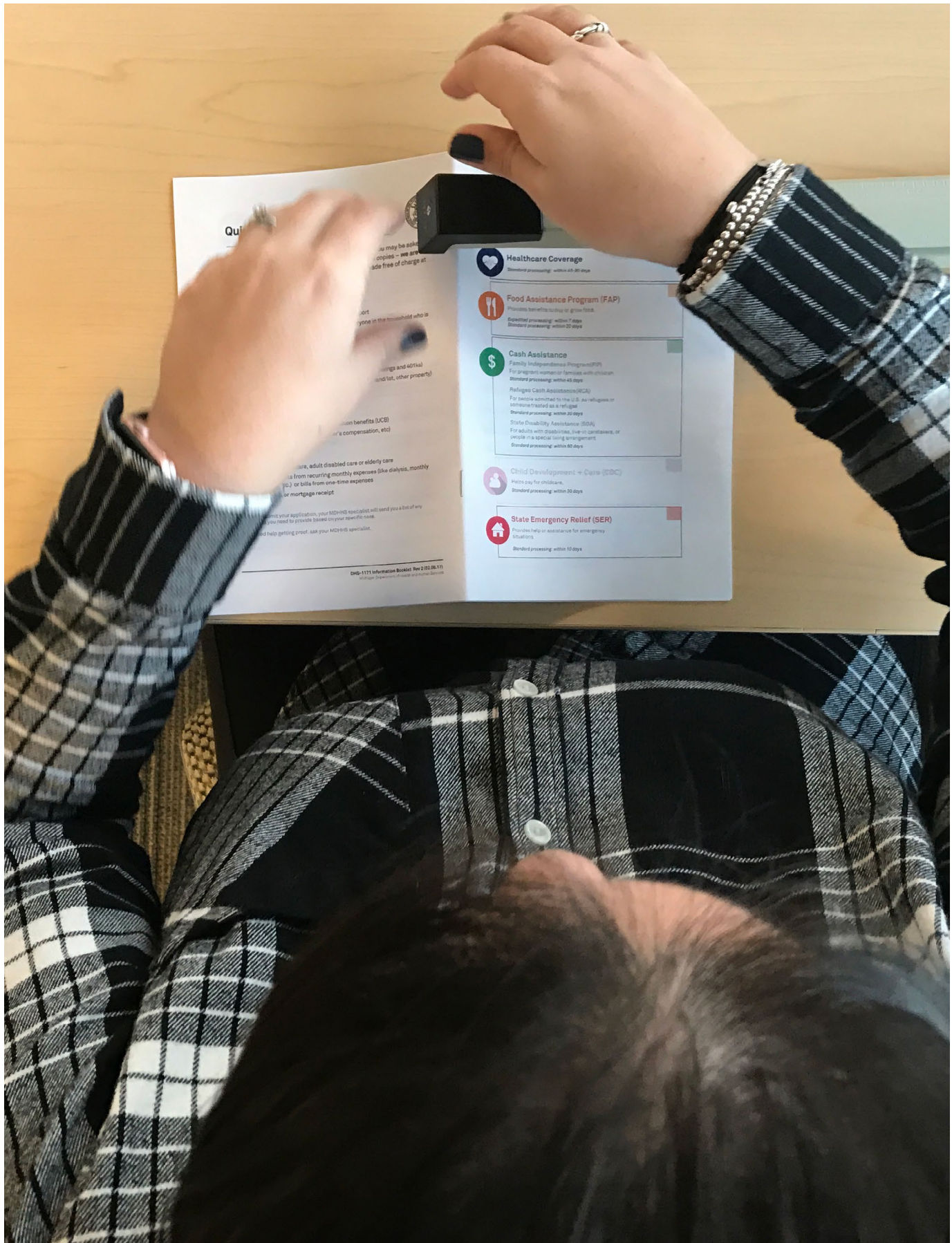
**Once you've identified problems, you can begin brainstorming possible solutions with core users including residents, frontline staff, and key stakeholders. As part of this process, you'll want to think about your agency's capacity to effectively design and implement change.**

For smaller projects, you can set yourself up for success by ensuring that:

- You have approval and authority to take on the project.
- You are willing to engage relevant internal and external stakeholders early and often.
- You have a process for incorporating user research and testing throughout all stages of the project.
- You can ensure changes are effectively implemented. Depending on the type of redesign you take on, this might include training frontline staff and partner organizations, notifying and onboarding residents, making technology changes, etc.
- You have a way to evaluate and report impact.

More ambitious redesign efforts can make an even bigger impact for residents, frontline staff, and government agencies, but they also require substantial resources to bring to life. If your agency has the appetite for a larger project, we encourage you to check out our [large-scale readiness checklist](#) to assess whether you're properly resourced for such an effort.





# ideas and examples

**Below are examples of smaller-scale redesign projects that you might take on to incrementally improve applications, renewals, and correspondence.**

## **Visual Redesign**

Streamlining visual design of applications, renewals, and correspondence makes it easier for residents to navigate forms and notices. This can increase their ability to complete forms accurately and on time, which can in-turn make processing easier for caseworkers. Key elements to consider for visual redesign include: updating fonts and text sizes, increasing text hierarchy, adding color and spacing, and highlighting key deadlines and actions.

Visual redesign typically requires user research, graphic design, and policy reviews, as well as light technical changes like updating forms in the correspondence management system.

As a next step, check out the Civilla Practica course on [Design Principles](#). This online course will introduce you to general principles of visual redesign in section 4, best practices for accessibility in section 5, colors in section 8, and fonts in section 9. We also recommend taking a look at the MDHHS [style guide](#) for tips and the [redesigned application](#) to see them in practice.

## **Simplify Language**

Simplifying the language used on forms and in notices can help residents with lower literacy understand communications. It can also reduce confusion stemming from legal or policy jargon, increasing people's ability to accurately complete the forms and take action on timely notices. This can help reduce call center volume, which in-turn frees frontline workers to focus on more complex cases.

Simplifying language typically requires user research, communications design, and policy/legal reviews, as well as light technical changes (if you're updating online forms and notices). If your form or notice will be going through a legal review, engage the legal team early in the process to ensure that your careful language choices do not get translated into legalese.

As a next step, check out Civilla Practica course on [Design Principles](#). This online course will introduce you to best practices for voice, plain language, and readability in section 7. We also recommend reviewing the [Federal Plain Language Guidelines](#). To see how MDHHS simplified language, read through their [redesigned application](#) for residents.

## **Reduce Length**

Reducing correspondence length by cutting non-essential text makes it easier for residents to digest key information. Shortening applications and renewals by removing questions that aren't necessary to determine eligibility and benefit allotment helps residents complete forms faster and ensures that eligible residents aren't dropping off in the process.

Reducing length typically requires user research, service and/or communications design, and policy/legal reviews, as well as light technical changes.

As a next step, check out Civilla Practica on [Design Principles](#), which will introduce you to best practices on streamlining form and notice length.

## **Pre-Fill Information**

Pre-filling forms with known information—so residents only need to make updates when something has changed—removes the time burden for residents of filling in details that the agency already has on file. This makes it faster and easier for residents to complete forms accurately and on time.

Pre-populating information typically requires user research, data, and engineering resources, along with policy/legal reviews.

Review federal and state guidelines for pre-filling information on renewal forms and correspondence for benefit programs. The U.S. Centers for Medicare & Medicaid Services (CMS) has issued federal requirements for [Medicaid and Children's Health Insurance Program \(CHIP\) renewals](#), whereas you'll want to review state requirements for SNAP, WIC, and TANF.

## Expand Translation Options

Translating applications, renewals, and correspondence into commonly spoken languages other than English improves accessibility for communities that are often underserved.

Expanding translation options typically requires user research and data resources to identify language needs, as well as native speakers to translate and review materials for accuracy and readability. This work may require light technical changes.

As a next step, check out the Civilla Practica course on [Design Principles](#), which will introduce you to best practices for translation in section 10, and the Beeck Center's Guide to [Multilingual Translation](#). The Centers for Medicaid and Medicare Services [Guidelines for Translation](#) is another good resource.



# 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.**

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](#) provided 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 that this guide helps you by giving you a framework for applying human-centered design principles and some ideas to consider. As you get started with redesign, we encourage you to 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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## project credits

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## beeckcenter 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](#).

## civilla

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