



**LEARNING COLLABORATIVE
FOR CUSTOMER SERVICE**

Using Data to Diagnose and Address Churn

August 25th 2016

Housekeeping

- ▶ **ASKING QUESTIONS:** Viewers will be muted throughout the entire call. Click the “Q+A” button on the bottom of your screen. You can choose to submit a public or anonymous question, which we will try to answer throughout the call.
- ▶ **TECHNICAL ISSUES:** If you are having technical issues or have any other questions regarding the webinar you can click “Chat” at the bottom of your screen to send a private message to the panelists.
- ▶ **POLLS:** We will also be taking a few polls during today’s webinar. You may be asked to answer by raising your hand by clicking the “Raise Hand” icon to cast your vote, or a detailed poll will pop up automatically for you to answer.

Agenda for Call

- ▶ CDSS & USDA Learning Collaborative Update
- ▶ Webinar Objectives
- ▶ State Data - What can counties learn from it?
- ▶ Local Data - Contra Costa example
- ▶ Q&A / Discussion

CDSS/Learning Collaborative Updates

- ▶ A survey will be forthcoming to PMC
3:3:3 points of contact
- ▶ Small county meeting(s) in September
(TBA asap)
- ▶ Federal Learning Collaborative (CDSS,
Sac, OC, Riv) meeting on 26-28th in NC
- ▶ New CDSS County Technical Assistance
unit is 3-4 months away
- ▶ Join our new listserv CalFresh-FYI:
<https://groups.google.com/forum/#!forum/calfresh-fyi/join>



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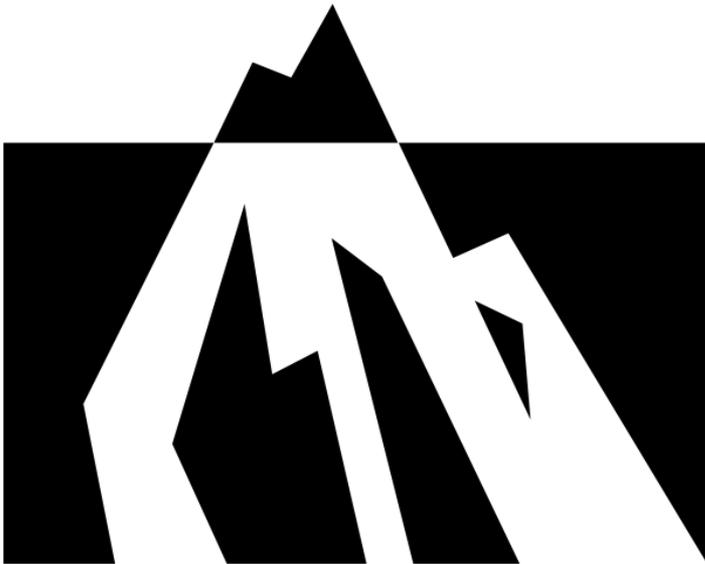
State CalFresh Data: What can counties learn from it?

Presenter: Diana Jensen
diana.jensen@gmail.com

Today's Objectives

- ▶ Explore the value of existing state and local data to understand and improve CalFresh program performance.
 - ▶ State data
 - ▶ Local data
- ▶ Identify opportunities for next steps

State CalFresh Data is the tip of the iceberg



Created by Luis Prado
from Noun Project

What is “state data”?

CalFresh Regular State Reporting (<http://tinyurl.com/7mzjum4>)

- Caseload Movement Reports (DFA296, DFA296X, new CF296)
- Participation and Benefits Issuance Report (DFA256)
- Annual Race/Ethnicity Reports (DFA358F/S)
- Work Registrant/ABAWD/E&T Reports (STAT47, STAT48)

Other CalFresh Data (<http://www.cdsscounties.ca.gov/foodstamps/>)

- Additional CalFresh Data Dashboard Items
(cross enrollment with Medi-Cal, Program Reach Index)
- Consortia churn reports (quarterly SIRFRAs)
- CAPER / Error Reports



Quick Poll #1:

- ▶ How often do you or your staff look at the CDSS CalFresh data reports to try to learn something about your county's performance?
 - a) Regularly
 - b) Occasionally
 - c) Rarely/Never
 - d) We didn't know that it was available on-line

County/State Socioeconomic, Demographic and CalFRESH July - September 2015

Quarterly Statistics

Data Element		Statewide				
		<i>Same Qtr Previous Year</i>	<i>Previous Qtr</i>	<i>Current Qtr</i>	% Change from Previous Qtr	% Change from Previous Yr
		Jul-Sep 14	Apr-Jun 15	Jul-Sep 15		
CalFresh Caseload	CalFresh Households (1)	2,085,940	2,136,298	2,148,124	0.6%	3.0%
	CalFresh Persons (1)	4,475,930	4,476,636	4,489,568	0.3%	0.3%
	% Medi-Cal Receiving CalFresh ^{af} (2)					
	CalFresh Persons Receiving Medi-Cal (2)	3,700,122	3,797,689	3,875,115	2.0%	4.7%
	% CalFresh Persons Receiving Medi-Cal (2)	82.7%	84.8%	86.3%		
	Timeliness - 30 Day % (3)	96.6%	97.2%	96.7%		
	Timeliness - Expedited % (4)	92.8%	94.7%	94.2%		
	Active Error Rate (5)	5.1%	4.6%	4.6%		
Total Churn	30 Day Total Churn - % of Reapplications (6)	12.6%	NA**	NA**		
	90 Day Total Churn - % of Reapplications (6)	20.2%	NA**	NA**		
Recertification Churn	30 Day - % of Scheduled Recertifications (6)	11.4%	NA**	NA**		
	90 Day - % of Scheduled Recertifications (6)	14.5%	NA**	NA**		

- Participation vs. Population
- Timeliness
- Connectedness with Medi-Cal
- Churn
- Error

**Hard to Read:
What's "good"?**
Trends?

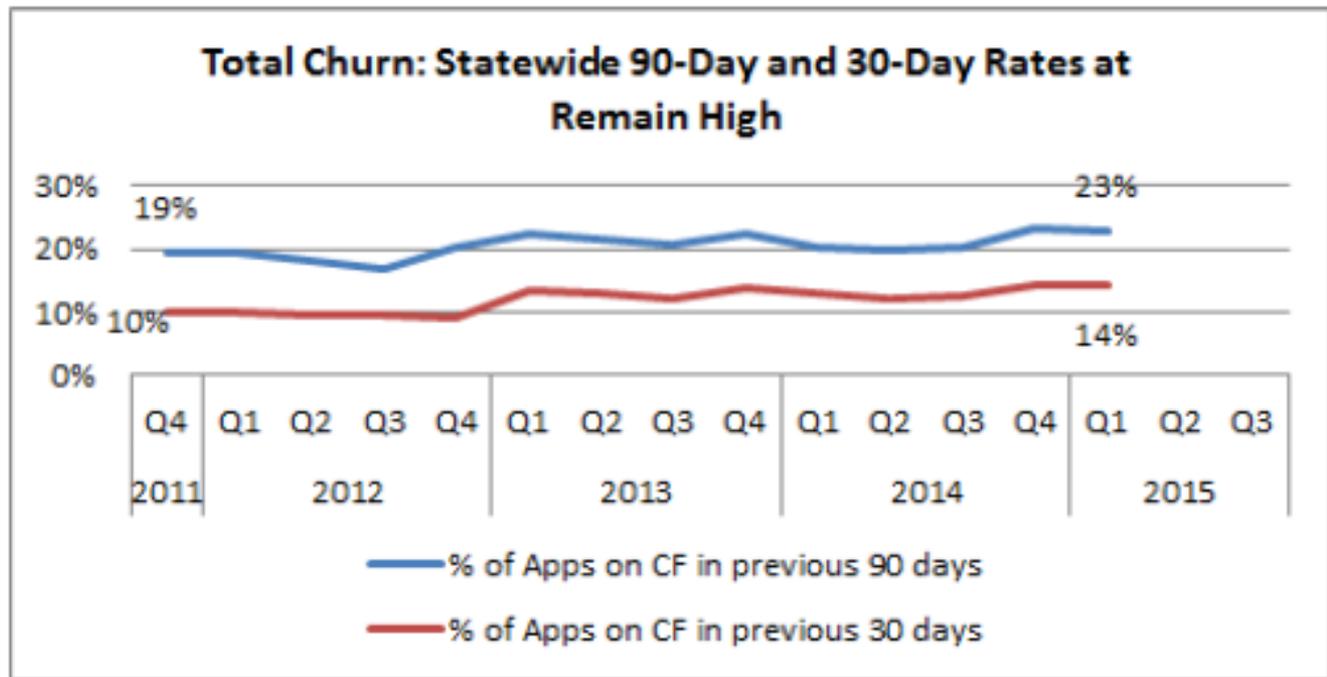
We can understand more by visualizing the data different ways:

- ▶ State level summaries
- ▶ Comparisons across counties
- ▶ County dashboards
- ▶ Interactive visualizations

All available on Learning Collaborative website's Resources
Page: <http://tinyurl.com/glkzaca>

State Level Summary

23% of new applicants were on benefits in the past 90 days



Churn - more detail by county

Did it improve
over time?

Since last year?

Is the change
consistent over
time?

Is there a peer
you could learn
from?

See Metrics Together - All counties

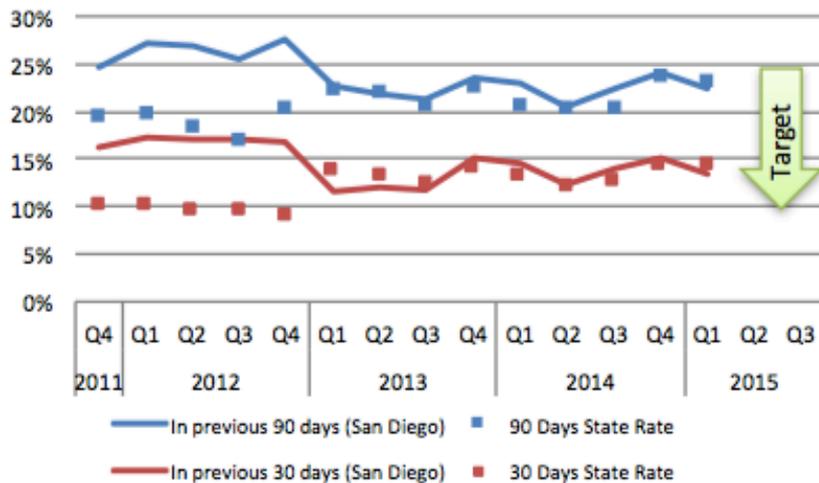
		Reducing Churn (Data through 2015 Q1)							
		90 Day Churn				30 Day Churn			
		Apps that were on CF in prior 90 days	Trend since Oct-Dec 2011	Apps with an incomplete recert in prior 90 days	Trend since Oct-Dec 2011	Apps that were on CF in prior 30 days	Trend since Oct-Dec 2011	Apps with an incomplete recert in prior 30 days	Trend since Oct-Dec 2011
July - September 2015 (unless noted)									
Top 10 performers									
Next 10 performers		%		%		%		%	
United States (9/15)									
Statewide		23%		19%		14%		15%	
s (Participation ≥ 100k)	Los Angeles	NA**		NA**		NA**		NA**	
	San Bernardino	30%		31%		22%		28%	
	Riverside	26%		25%		17%		22%	
	San Diego	22%		11%		13%		7%	
	Orange	20%		12%		11%		8%	
	Fresno	24%		14%		13%		9%	
	Sacramento	21%		13%		12%		8%	
icipation 20k - 1	San Francisco	20%		15%		12%		10%	
	Monterey	23%		14%		15%		13%	
	Solano	12%		6%		1%		1%	
	Imperial	24%		27%		16%		24%	
	Santa Barbara	17%		10%		0%		0%	

A Dashboard for Your county

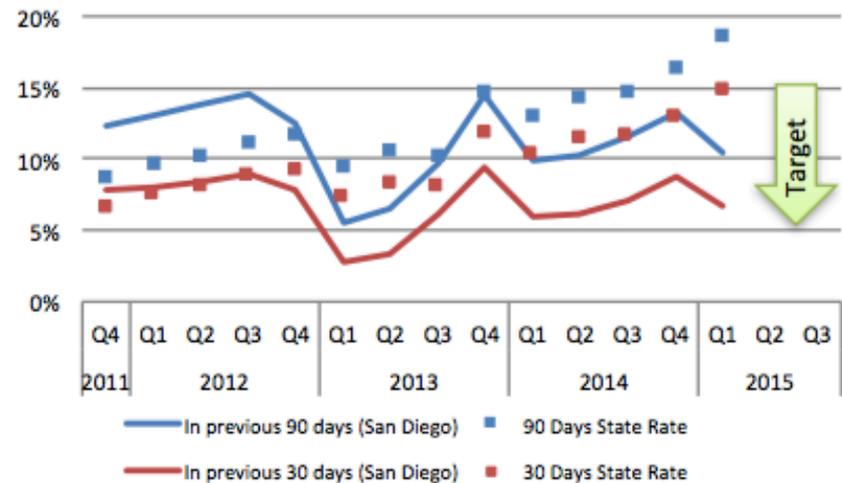
Churn

San Diego

Total Churn (% of Applicants on CalFresh in previous 90/30 Days)



Recertification Churn (% of Applicants with a Scheduled Recert within 90/30 Days)



San Diego Dug In...



July 2016 Churn Report

	Total CalFresh Apps Received	Initial Apps	Initial App(%)	Application Received Benefits-Previous 30 Days (%)	Application Received Benefits-Previous 60 Days (%)	Application Received Benefits-Previous 90 Days (%)	Application Received Benefits-Previous 120 Days (%)	Application Received Benefits- Over 120 Days Ago (%)
Central Region	3241	1401	43.23%	15.18%	6.14%	3.98%	3.09%	28.39%
East Region	3876	1897	48.94%	11.84%	4.85%	3.72%	2.68%	27.97%
North Region	3382	1587	46.92%	10.70%	5.59%	3.90%	3.10%	29.78%
South Region	2186	984	45.01%	8.55%	6.40%	2.84%	3.29%	33.90%
Other	7	4	57.14%	28.57%	0.00%	0.00%	0.00%	14.29%
San Diego County	12692	5873	46.27%	11.83%	5.64%	3.68%	3.00%	29.57%

Month	Total CalFresh Cases Restored	Received Benefits - Previous 30 Days w/ Restoration Code
Jul-16	894	125

Data Sources: CIS Tables- the data may be slightly increased based on the data run date

Note:

*Total CF Case restored = duplicated cases. Some case may have multiple applications that created for the data month

**Total CF App Restored that received benefits previous 30 Days with Restoration Code- this data is captured number of applications that restored for the data month(action date: 7/1/16-7/31/16) with Restoration Code (RESTORATION CODE in Collect Applicant information screen).

Raise your hand!

- ▶ If your county uses a regularly-run data analysis or dashboard to assess **churn**, raise your hand, and we will follow up later to learn more!

Compared to all counties - interactive

<http://tinyurl.com/j7scstg>

tableau public

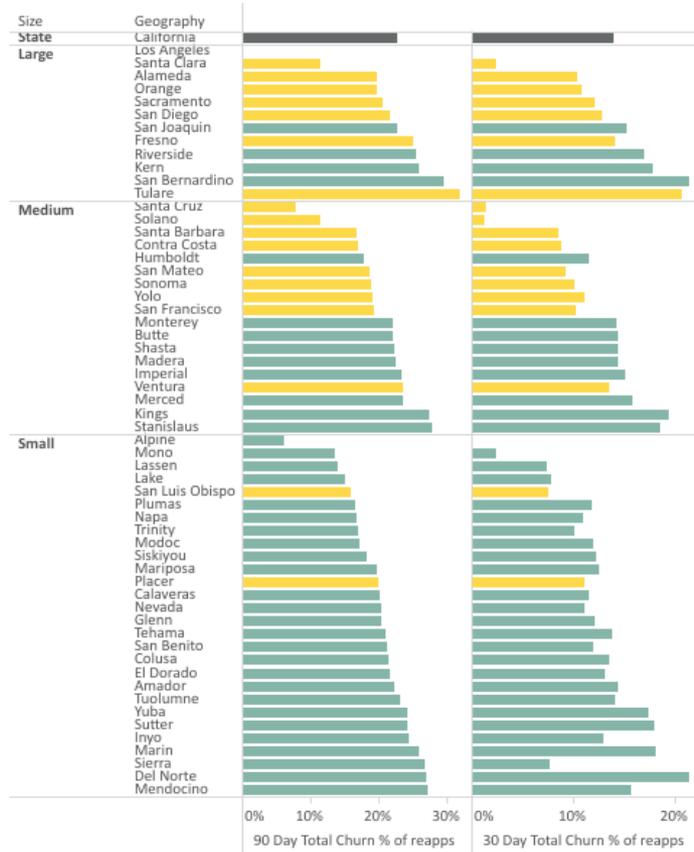
GALLERY

AUTHORS

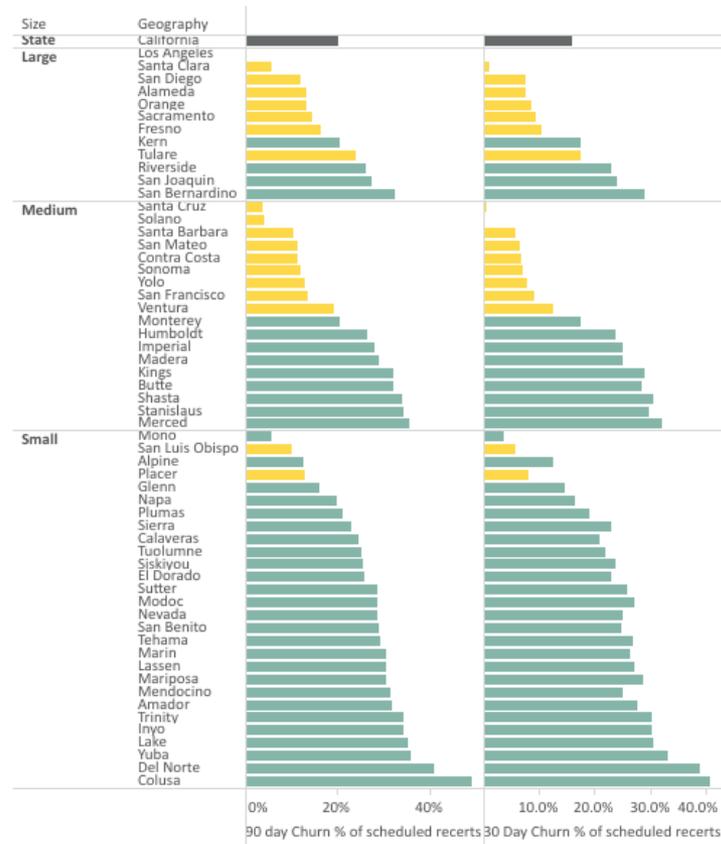
BLOG

RESOURCES

**Total Churn - 90 Day and 30 Day
2015 Q2**



**Recertification Churn - 90 Day and 30 Day
2015 Q2**



Quarter

2015 Q2

Consortium

(Multiple values)

Consortium

C-IV

CalWIN

LEADER

State

Region

(All)

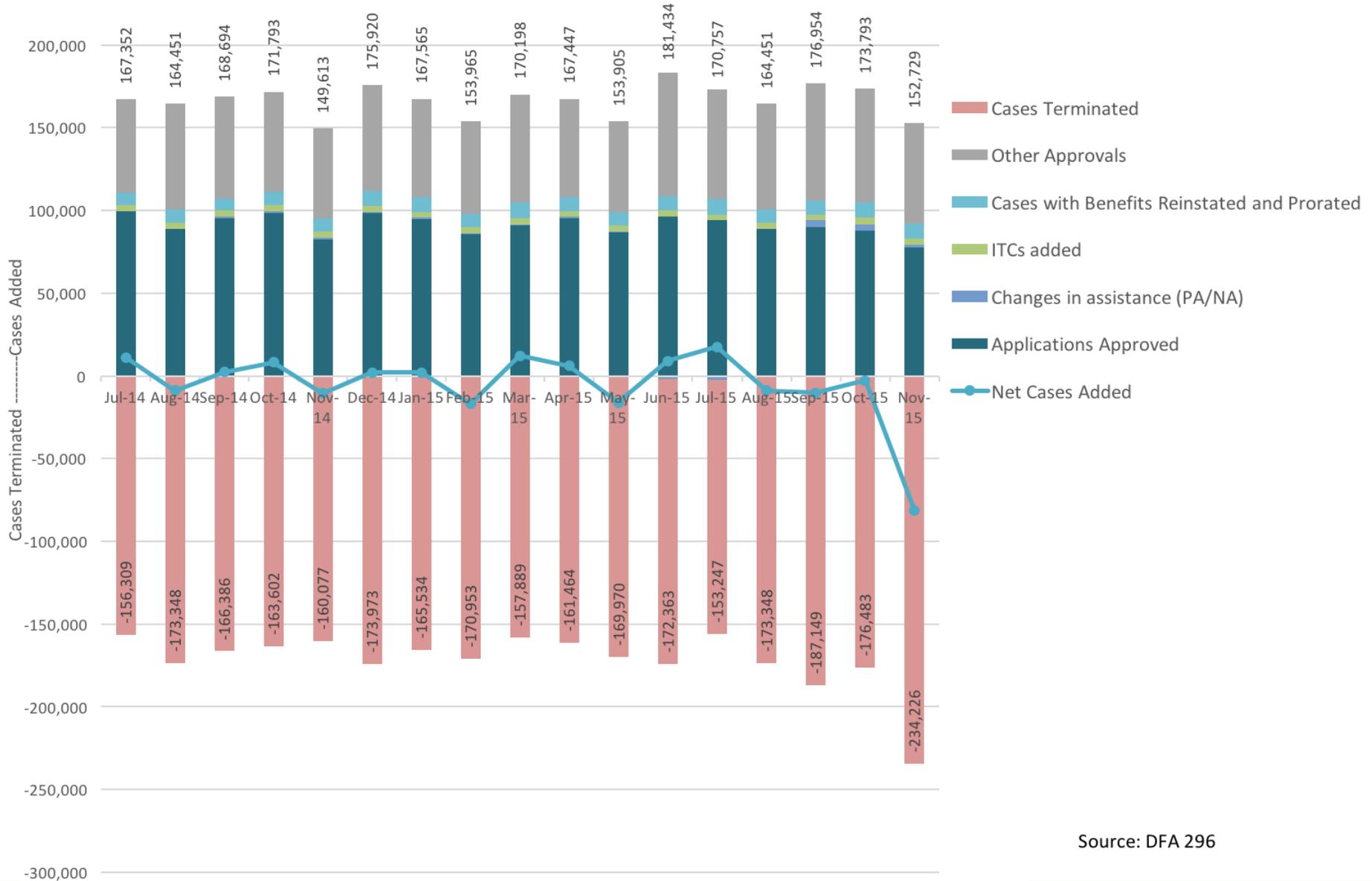
Examples of next analyses using state data

- ▶ Caseload movement monthly reports (DFA296)
- ▶ Consortia Churn reports - more detail
- ▶ Analysis of updated dual enrollment data when available

Cases Added & Terminated - Statewide

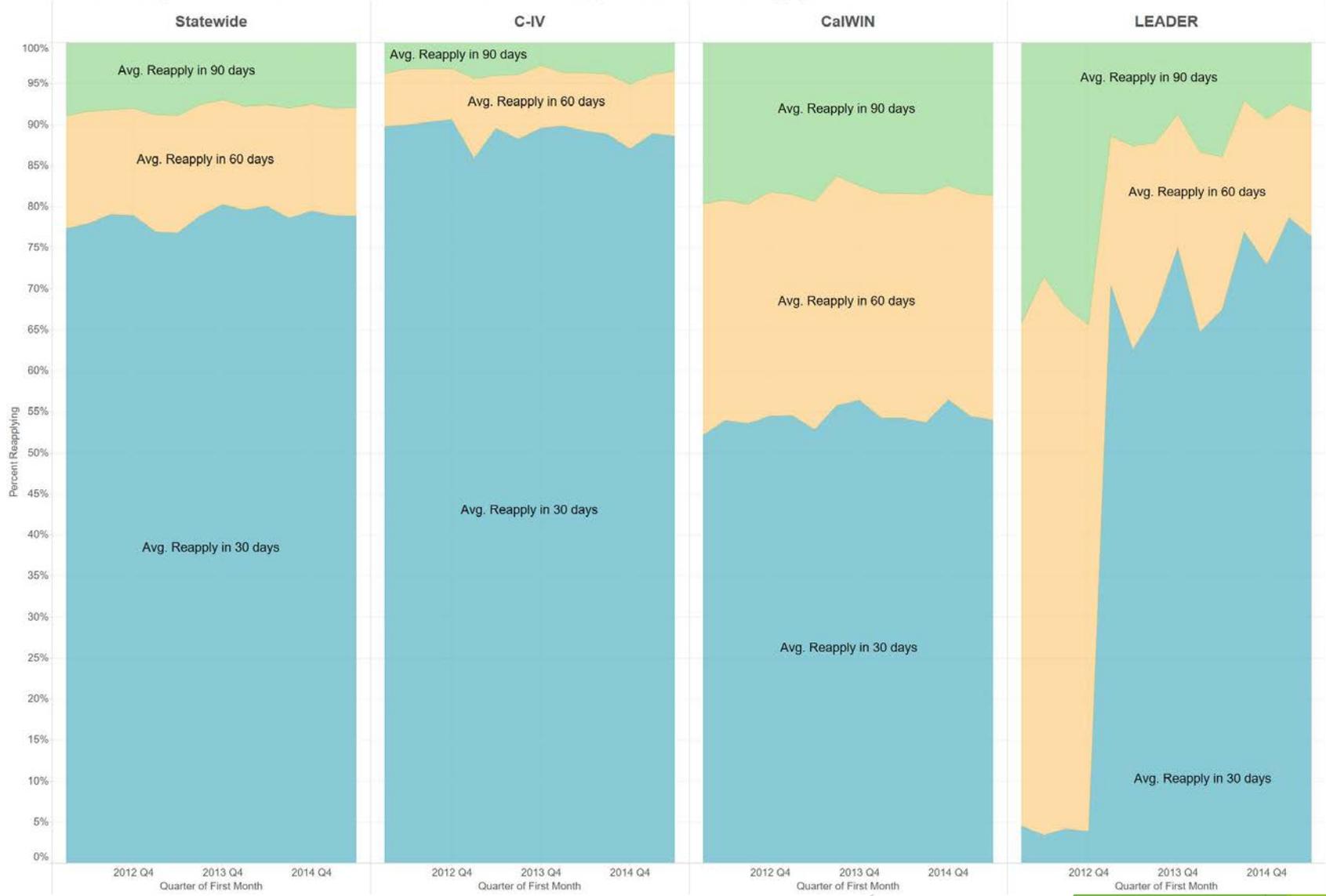
Large numbers of cases are terminated;

Many new cases are not from new approved applications



Time to Reapplication After Incomplete Recertification

Cases Did Not Complete Recert, Did Not Receive Benefits In Following Month, Did Not Reapply



Raise your hand!

- ▶ If your county is interested in giving feedback on our next round of data analysis to help make them as useful as possible, raise your hand!



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Customer Service: Using local data to address churn

Contra Costa County
Vakil Kuner
August 25, 2016

There are two key points in this presentation

1. What we learned from local data
2. How you can use two simple measures to reduce churn - Application success rates and 30 day churn

Initial research - What are the bottlenecks?

- ▶ Many applicants do not get benefits
- ▶ But **very few are ineligible**
- ▶ Most miss an appointment
- ▶ The rest do not complete verifications

We also learned these data are hard to measure. But success rate is very easy to measure.

Success % = (# who get benefits *100)/ # who apply

Looking at our customers we discovered churn

- ▶ 35% were on benefits the previous month
- ▶ AND 90% of these customers are still eligible
- ▶ We also learned 30 day churn is very easy to measure (Restorations + Reapplication)

What are the problems ?

- ▶ Customers have difficulty making their appointments
- ▶ There often are multiple appointments
- ▶ Poor notification - a single NOA
- ▶ The SAR-7 or Recertification is too daunting
- ▶ Verifications are incomplete

Solutions - 4 categories

1. Reduce the number of appointments
2. Let customers easily pick an appointment time
3. Improve notifications
4. Make paperwork easier

14 Sample Solutions

1. Appointment improvements:

1. Same day service (one appointment)
2. Telephonic appointments on demand (one appointment if customer has verifications)
3. Telephonic signatures (customers do not have to come to the office)
4. Renewal hotline (customers do not have to wait long to talk to an eligibility worker)

2. On-line Self service appointment system

1. Customers can set their appointment.
2. Customers can change their appointment

1. Improve notifications - augment the NOA

1. Text message alerts (e.g. Your benefits expire soon - call 999-999-9999)
2. A user friendly, readable postcard
3. A user friendly, readable letter - more information about verifications than the postcard.
4. Robo-calls (should be professionally produced)
5. Real person calls - perhaps made by a community partner

2. Make paperwork easier

1. Empower the customer with knowledge - what they have to do when
2. Promote BenefitsCalWIN (BCW) for renewals
3. Promote photos of documents uploaded to BCW

Small Pilots Minimize Risk

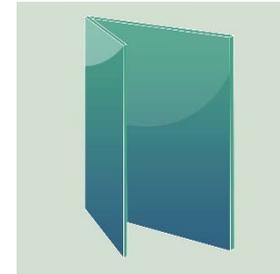
- ▶ Small Pilot Parameters: 1-3 staff, weekly iterations, 3 months maximum, low out of pocket expense
- ▶ Goal: Learn what works, then improve, then test again
- ▶ Use data to demonstrate results
- ▶ A-B test concept: One group of customers gets the improvement and the other group does not.

Pilot 1: Renewal Reminder Post Card



- ▶ A postcard benefit expiration reminder will augment the NOA.
- ▶ The message will be short, readable, and have a number to call for renewal assistance.
- ▶ We will pilot the post card with a small group of customers to get feedback and make corrections.
- ▶ The next pilot will be sent to customers at one district office. This will be the “A” group.
- ▶ The “B” group will be customers at the same office the preceding month.
- ▶ The measure will be reduction in churning applications

Pilot 2: Informative paperwork “wrapper”



- ▶ Empower customers to understand the enrollment process. The wrapper is a folder printed with an explanation of the enrollment process. It was extensively tested with customers, staff, and assisters and then refined.
- ▶ Because the cost was low it was tested at four major intake centers for three weeks.
- ▶ On Monday, Wednesday, and Friday the wrapper was given to all customers -- the A group.
- ▶ The customers on Tuesday, Thursday, plus a few days before and after the pilot are the B group.
- ▶ The criteria is a significant improvement in success rate.

Pilot 3: Photo upload tutorial

- ▶ Customers who photograph their documents and upload them can eliminate a document drop-off appointment.
- ▶ The tutorial was created and reviewed by staff, assisters at the Food Bank, a small group of customers, and revised.
- ▶ 20-30 customers will be given an incentive for a short telephone interview. Based on results the tutorial may be revised.
- ▶ A Group: The BenefitsCalWIN unit will email all applicants the tutorial for a month. One office will give applicants the document to all applicants for a month. B Group: Customers using BCW and the pilot office for the prior month
- ▶ The criteria is a higher success rate for customers using the tutorial.

Questions?

Free pilot design help

- ▶ Contact me at Vakil@msbn.com with your ideas for a pilot and I'll help you design a data driven, low cost project.
- ▶ Raise your hand to express interest!



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Q & A

- Questions?
- Ideas for useful analyses?
- Other things to share?