

Case study overview

Customer Profile

Ventura County Human Services Agency provides assistance to over 100,000 Ventura County residents each month in a variety of public assistance programs including food stamps, CalWORKs, Medi-Cal, adult and family services. The agency had a 2008 operating budget over \$190 million and has 1000 employees. Located just northwest of Los Angeles, Calif. Ventura County is home to over 700,000 people.

Challenge

Ventura County Human Services Agency must comply with a host of federal and state regulatory standards while meeting internal Lean Six Sigma goals to provide the best services to the most people possible.

Solution

PolicyTech™'s Policy & Procedure Manager® software.

Benefits

Using Policy & Procedure Manager has helped Ventura County Human Services Agency manage more than 4,000 documents. They no longer spend \$24,000 a year on copy costs and the approval process has been reduced from a three- to twelve-month process to less three months on most documents and as little as one week for some.

Case Study: Policy Manager Helps Health Services Agency Lower Costs and Boost Services

"The greatest return on investment is in developing efficiencies in regards to business processes to issue timely benefits to our customers."

--Myra Chavez, Ventura County Human Services Agency

Summary

Using PolicyTech's™ Policy & Procedure Manager®, Ventura County Human Services Agency utilizes policies and procedures to provide services and benefits affordably and efficiently through 17 locations serving the 700,000 residents of the county.

Overcoming shortcomings in the policy management system

Keeping 1,000 employees informed and educated on new policies and procedures is the major challenge that faced Ventura County Human Services Agency. Myra Chavez, Ventura County Human Services Agency program analyst, is charged with keeping the agency current on the surfeit of regulations required of the agency.

"We have so many programs that have to be accountable to the state and federal organizations we have to be in compliance or there's just no way (to keep functioning)," said Chavez.

Using binders with paper copies distributed by each department just did not get the job done. Each department within the agency had paper manuals and each department shared the information differently.

"Information was shared in a way that all staff did not receive the same information," said Chavez. "Individuals could not validate that the information they received was the most current."

With 4,500 documents and 1,000 employees the paper distribution of policies alone was costing taxpayers more than \$24,000 a year. Further, lack of consistent business practices and easy access to the documents cost the agency efficiency and productivity.

By implementing PolicyTech's Policy & Procedure Manager, Human Services Agency was able to revitalize their policies and procedures by eliminating the recurring costs of reproducing manuals, reducing approval processes from months and years to days and weeks, and increasing agency efficiencies with standardized business practices.

Employees were also able to be quickly and easily trained to enable them to use the software as a tool to accomplish their jobs.

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About PolicyTech:

Policy Technologies International Inc. (PolicyTech™) develops and provides web-based software that manages policies and procedures in a convenient, reliable way. PolicyTech software has become the policy management software of choice for companies in a variety of industries including government, health care, education, and finance as well as in non-profit organizations. With a slate of recent government regulations pressing the need for corporate responsibility to all-time highs, PolicyTech policy management software is the solution for quality assurance and enforcement of best practices.

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Policies help meet regulations

Prior to using Policy & Procedure Manager, the Human Services Agency “came close” to being fined for regulatory violations. When the agency began loading policy documents into the software system in 2007, they realized that almost 1,500 of their documents had not been revised in the previous nine years. Now in Policy & Procedure Manager, each document has an automatic review interval that will remind a document owner when it is time to review their documents.

Best practices—Lean Six Sigma

The Human Services Agency uses Lean Six Sigma to facilitate streamlining agency operations and improve customer service. One of the key facets of Lean Six Sigma is the ability to quickly distribute best practices updates to employees so they can begin implementing these improvements in their work. Policy & Procedure Manager uses e-mail to quickly distribute new policies across the agency.

Simple training

Policy & Procedure Manager is easy to use because of its simple interface and Microsoft Word module for writing documents. Chavez quickly learned the system despite beginning work at the Human Services Agency after the initial installation.

“It was a self-training which I found very easy,” said Chavez. “I read the manual, we had a training environment set up for us, and I went in and created a test document.”

Chavez was then able to deliver hands-on training to the line staff.

“One of the main selling points of Policy Manager is that it is very user-friendly,” Chavez said.

Conclusion

Policy & Procedure Manager helped the Human Services Agency staff have a uniform understanding of how to do their jobs that leads to higher efficiency and better customer service.

Chavez also recommends it to other government organizations looking for similar benefits.

“The greatest ROI (return on investment) is in developing efficiencies in regards to business processes to issue timely benefits to our customers,” said Chavez. “Policy & Procedure Manager is something that is easy, fast, and has a proven record.”