



## Consortium Workload Manager

---

**Background:** The Capital Consortium currently has a CCA Manager overseeing our CCA performance, identifying phone trends, analyzing data, determining actions to be taken, proposing improvement plans, and coordinating resources with partner agencies, unit supervisors, and management. We have established phone expectations based on averages. Because ongoing case management is currently estimated to be fifty percent of staff time, it is equally important to dedicate the same oversight to workload management. One goal is to establish workload expectations for staff. It is important to make sure we are correctly balancing CCA and ongoing case management. Ongoing case management can be strengthened by working within our teams. We can better utilize time and staff in a team environment. Staff feels accountable to each other. If we find there are a lot of documents that need to be completed in a team, we can have the fast document processors helping others get caught up. If someone does not have an appointment, they could help someone else in the team that has a lot of renewals. The Workload Manager will look at the overall workload and will work with the CCA Manager and unit supervisors to see if there are resources within the team or if help can be utilized at the Consortium level.

*JoAnne Jaehnke – Capital Consortium Workload Manager*  
*Kara Ponti – backup Capital Consortium Workload Manager*

This position was developed to oversee the Capital Consortium ongoing caseload. The Workload Manager will identify workload trends, analyze workload data, determine actions to be taken, and will propose improvement plans. The Workload Manager will be communicating regularly with the CCA Manager, partner agencies, and unit supervisors to discuss resources, trends, and proposals. Ongoing workload expectations will be developed. Working with teams will maximize Consortium workload efficiency.

## **I. Priority work items**

### **A. Utilize all available resources to determine priority work items.**

- 1. Daily Workload Report**
- 2. Automated Case Directory**
  - a) Reviews due for the month and next month*
  - b) Untimely PS applications*
  - c) Timeliness Report*
- 3. Workload Dashboard**
- 4. SharePoint/CCA Schedule**
- 5. MNSA in HOD for alerts**
- 6. Caseload Management Search Criteria**
- 7. Control-D**

### **B. Develop a strategy to complete the daily priorities.**

- 1. Work with CCA supervisors to determine the available staffing resources for the special project work when CCA is manageable. Daily am and pm shift coordination will be necessary to determine how many workers can be pulled off CCA to work on special projects based on call volume, staff availability, and volume of ongoing workload.**
- 2. Daily am and pm shift coordination will be necessary to determine who will be distributing the workload distribution lists, monitoring work completed, and answering questions for the staff assigned to special projects.**
- 3. Work with individual units and partner counties to determine the staffing resources required to complete the daily work and special project work.**

## **II. Trends**

### **A. Identify trends.**

- 1. Monthly**
- 2. Daily**
- 3. Unit**
- 4. Individual**

*a) If there is a pattern of consistently falling behind, work with the unit supervisor to:*

- (1) Determine what resources can be utilized to get the worker caught up.
- (2) Determine if training/mentoring would help the worker.

### **5. Adverse Action**

### **6. CDPU**

- a) Did we get old documents?*
- b) Did we get a lot of returned mail?*

### **7. Errors**

- a) Determine who is making the errors?*
- b) Work with supervisors to determine if there is a need for training, mentoring, discussion at meetings, or email communication.*

### **B. Analyze trends.**

### **C. Determine action to be taken.**

### **D. Propose improvement plans and write up option papers for discussion at our Capital Consortium Supervisor meeting.**

### **III. Communication**

- A. Work with the lead team to get the oldest work items ready to work on when CCA is manageable. The CCA supervisor will direct workers to get work assignments from the Workload supervisor.**
- B. Work with the CCA supervisor to determine the number of staff that can be pulled to work on Consortium tasks.**
- C. Communicate trends to upper management and fellow supervisors**
- D. Communicate with unit supervisors regularly regarding individual staff work or team work that needs to be completed.**
- E. Discuss all proposed improvement plans and written option papers for discussion at our Capital Consortium supervisor meeting.**

### **IV. Establish work expectations**

- A. Track documents completed each day.**
- B. Determine the average amount of workload items that should be completed in a day by the agency and by individual worker.**
- C. Communicate the expected average to supervisors and staff.**

### **V. Maximize efficiency**

- A. When staff completes their ongoing casework, they will be directed to help out their team.**
- B. When the team work is completed, available staff will be helping with the consortium workload.**
- C. Lists will be prepared and ready first thing in the morning.**

### **VI. Develop tools/resources for supervisors to keep us all on the same page.**

## **VII. Staff Morale**

- A. Staff who stay on top of their workload and are always caught up will be selected to be taken off CCA to do special projects more often.**
- B. Staff who consistently answers a high number of CCA calls will be selected to work on special projects more often.**
- C. Consequences will be recommended for staff that consistently falls behind, even after help has been provided.**