

# Focused Conversations Report: Social Needs Tool and Self-Service Portal (Screening and Referral)

*December 2020*

The Business Solutions Office at the Minnesota Department of Human Services (DHS) hosted a series of conversations to help shape the design of an online, interactive tool that will offer personalized, relevant and local referrals based on social needs that a person identifies. Participating groups included:

- [Client-facing staff from 10 Minnesota counties](#)
- [A work group of staff from three Minnesota tribal nations](#)
- [Members of the Cultural and Ethnic Communities Leadership Council.](#)

The DHS team has done extensive secondary research to flesh out the framework presented [by Minnesota's Integrated Services Business Model](#), and with this effort, has moved into co-design with users and stakeholders, to ultimately create a product that is built from what they want and need.

This conversation series is one part of a broader engagement plan that will continuously involve community organizations and leaders, county and tribal nation human services agencies, and people served by the human services system statewide.

**Learn more:** To learn more about Minnesota's efforts to modernize systems and integrate services, visit the [integrated service delivery website](#), and check out the collaborative [Modernization Plan](#).

# County Staff Focused Conversations

## Purpose

- Share concepts and initial prototypes for county staff input and reaction related to a statewide digital Screening and Referral process and tools.
- Results will be used by the team to inform design of tools, processes and eventual IT requirements.

## Topics

- **Overall concept** of a self-service digital experience to help people navigate human services resources based on their unmet needs.
- Accessible **website/landing page** where tools and information will be hosted in multiple languages, with help functionality.
- **Online account** functionality and associated trust, security and privacy issues.
- Unmet needs **questionnaire** and resulting **resource information**, communication options and connections to local resources and processes.

## Key findings

Overall and website design:

- Participants saw value for end users having a single place to find information on the variety of programs/services offered by the human services system.
- Participants stressed that tools must be designed around the principle of plain language, clean and accessible design, and the importance of translation to multiple languages.
- Participants shared information about current operations, particularly in relation to referrals to community organizations and the way emergencies and urgent outreach are handled. These are important inputs to creating warmer handoffs for people and directing them to the right resources.

Social needs tool:

- Participants suggested that a screening tool is able to quickly identify a person's needs and point them to relevant information aligns with current efforts underway with redesign of intake processes.
- Participants validated the length of the draft screening questionnaire, and the simplicity of the questions. They offered guidance on more sensitive wording for a few questions (and there was consensus across multiple sessions on which questions were likely to need rewording).

Online account:

- Participants would like to see an online account with robust functionality that includes uploading documents, communication with clients, and appointment scheduling.
- Participants urged that an online account be easy to create, manage, and access. They highlighted specific communication needs and challenges that are important for success.

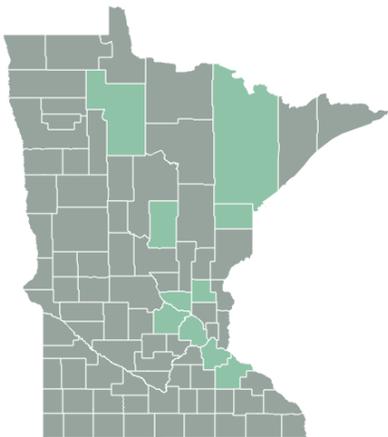
- Participants shared many thoughts around what personal information should be shared and when it's appropriate to request.

## Format and Process

- Rapid process; 6 sessions from 10/21/20-11/6/20.
- 3-5 county staff per session, from across different counties and program areas.
- 1.5 hour sessions, via Webex online video conference.
- Human-centered design approach and methods (co-creation, group interview/listening, prototyping, harvesting, iterating).

## Participants

An overview of the project and proposed engagement process was presented to the Minnesota Association of County Social Service Administrators (MACSSA), along with a request for members to share the opportunity to volunteer with their staff if they'd like their county to participate in this phase of the project.



County	Number of Staff	Metro or Greater MN
Beltrami	1 (director)	Greater MN
Carlton	4 (2 supervisors; 1 team leader; 1 client-facing staff)	Greater MN
Crow Wing	7 (client-facing staff)	Greater MN
Dakota	2 (supervisor)	Metro
Goodhue	8 (client-facing staff)	Greater MN

County	Number of Staff	Metro or Greater MN
Hennepin	1 (manager)	Metro
Isanti	1 (client-facing staff)	Greater MN
Sherburne	5 (1 director, 4 client-facing staff)	Greater MN
St. Louis	1 (client-facing staff)	Greater MN
Wright	1 (supervisor)	Metro

### Participating programs

Financial Assistance, Economic Assistance, Adult Mental Health, Child Protection, Child Support, Waivered Services, Long-Term Care and Disabilities Services, Support Services, Social Services, and Community Health.

### Participating roles (generic)

Eligibility worker, financial worker, social services worker, social worker, intake worker, child protection worker, clerical/front desk/office services worker, lead, supervisor, team lead, manager, director, and area manager.

### Process feedback, gaps, learnings

#### Feedback

For the first session, which participants were aware was intended to serve as a pilot, a fairly extensive survey was completed after the session. For subsequent sessions, a brief survey was sent, asking:

- Did you feel like the session was a good use of your time, and did it meet your expectations? How can we improve the format, facilitation, or content of the session going forward?
- Would you be willing to participate in a future conversation? We'd love to check back in with you down the line, as we continue to develop the design.
- We will have several more conversations with county staff, and are particularly interested in connecting with people that serve clients directly (or supervise teams that serve directly). Can you recommend any colleagues that might be interested in participating?

Feedback was largely very positive. Every respondent found the sessions productive. Most noted that they liked the general format and facilitation, and felt it was a good use of their time. Many are interested in engaging again in the future or sharing with their colleagues opportunities to engage, and several suggested names of people they think would like to participate or would have a valuable perspective. They are glad to be included this early in the process.

Ideas for future sessions were:

- A few people would have appreciated receiving the slide deck and conversation guide in advance.
- Some suggested to include more information in the presentation/explanation about the concepts:
  - The scope of the tool and more specifically, whether or how it will address social services broadly or focus primarily on financial programs and healthcare.
  - Differentiation from other tools people might be familiar with (specifically Bridge to Benefits, Senior Linkage Line and adult protection intake).
  - An example/case study/journey map of how the tool and process would work for the end user would be helpful, and also how county staff would use it and what their responsibilities would be with using it.
  - A little more information and context on the envisioned connections to other systems and data.
  - More information on project status and timeline, specifically development timeline.

## **Gaps**

All counties were offered the opportunity to participate and sessions were entirely volunteer-based. As such, there are some gaps that should be intentionally addressed by future conversations.

1. Participants skewed white and female.
2. Metro participation was light, and not directly client-facing.
3. Program area representation was incomplete/uneven.

## **Learnings to take forward**

- Many of the key findings from this process will be used directly to inform preliminary requirements for the digital tools. The sharing and cross-sharing of information in this format led to some good ideas and points of consensus.
- The robust harvesting process identified a number of items that require further follow-up with additional staff or with users and community organizations.
- We were excited to see the high level of willingness from participants to join in future engagement opportunities related to this project and to integrated services more broadly. It was also very affirming to see that so many felt it was a good use of time.

The sessions covered a number of topics, and required a fair amount of explanation. We hope that for future focused conversations, we can continue to simplify and narrow in on key items. This is in part the nature of an iterative process, but something we'll work on intentionally. We'll also look to incorporate the improvement ideas provided by participants in the feedback post-sessions.

## Tribal Nation Focused Conversations

The Business Solutions Office at the Minnesota Department of Human Services (DHS), in partnership with the DHS Office of Indian Policy, hosted a series of conversations with tribal nation human services agency staff. The tribal nation conversation series began with a presentation to the Tribal Modernization Core Team about the project, with a request for assistance identifying participants. The Tribal Modernization Core Team recommended that instead, a series of conversations take place with a group of staff they'd designate, in order to:

- Participate in the Focused Conversation session the Screening and Referral team had planned.
- Help shape the conversation questions and prompts for future staff conversations, and ensure that the planning and execution of engagement with tribal nations was culturally competent and relevant to any future participants engaged.

Core Team members from White Earth, Red Lake and Bois Forte delegated staff members to participate in this workgroup, which met five times over the course of October-December 2020.

### Purpose

- Share concepts and initial prototypes for tribal nation staff input and reaction related to a statewide digital Social Needs Tool process and tools.
- Results will be used by the team to inform design of tools, processes, and preliminary requirements.
- Evaluate the Focused Conversation format and content for cultural competence and relevance for tribal nation staff audiences, and assist with plans for future and ongoing engagement approaches.

### Topics

- **Overall concept** of a self-service digital experience to help people navigate human services resources based on their unmet needs.
- Accessible **website/landing page** where tools and information will be hosted in multiple languages, with help functionality.
- **Online account** functionality and associated trust, security and privacy issues.
- Unmet needs **questionnaire** and resulting **resource information**, communication options and connections to local resources and processes.

### Key findings

Overall and website design:

- The populations participants serve would benefit from a system that incorporates UX design principles around simplicity and plain language and reinforced the value of focusing on this.
- Participants are interested in having a statewide tool that would channel members of tribal nations to their respective sites and services.

- Don't need to translate content into native/tribal languages; English is sufficient.
- Website content could rotate updates based on time of the year (like in the winter highlight energy assistance).
- Personalize the page for the user upon return to the site (from the initial online account/log-in).

Social needs tool:

- Participants shared knowledge from developing and implementing similar systems (TribalVue at Red Lake and WECare at White Earth), which should be leveraged in the development and implementation of this system.
- Link directly to tribal nation screening tool from social needs tool, if one is available.
- Add more options for the family composition question.
- Ask for educational level, not degree earned.
- Do not ask if someone is a member of a tribal nation, simply ask if they want services specific to this.
- Add prescriptions to physical health screening question.
- For referral, steer people to tribal agency first and they will get them pointed to the resources available: financial services, CASH assistance, food support, homeless program, three different childcare programs, agency employment and training program/employment training or more.

Online account:

- Participants expressed unique needs regarding communication with the populations they serve.
- Allow for physical and permanent address fields.
- Communication preferences should be selectable at the time of registration.
- Dashboard access should coincide with security level of the user.
- Social Security Number and Date of Birth are common information fields requested for identity.

**Format and Process**

- Rapid process; 4 sessions from 10/23/20-12/10/20.
- 3-5 tribal nation staff attended each workgroup meeting/session.
- 1-2 hour sessions, via Webex online video conference.
- Human-centered design approach and methods (co-creation, group interview/listening, prototyping, harvesting, iterating).

**Participants**

Members of the Tribal Modernization Core Team delegated the following staff to the workgroup based on their knowledge, experience, and capacity to assist with this project.

Tribal Nation	Person and Position
Bois Forte	Kristal Strong, Patient Benefits Case Manager (missed meetings due to COVID)

Tribal Nation	Person and Position
Red Lake	Tracey Kingbird, Assistant Executive Director for Oshkiimaajitahdah
White Earth	Ronda Amundson, Health Division Business Manager; Lindi McArthur, Director of Nursing; Jennifer Scott, Eligibility Worker

## Process feedback, gaps, learnings

### Feedback

Participants encouraged tribal stakeholder engagement during the entire design and development process.

For next steps with stakeholders in this work:

- Connect with tribes as a group and include all programs areas.
- Speak with emergency support services staff at tribal nations.
- Determine best tribal doorway to refer people to, as opposed to a particular program (specific website, phone number, etc.).
- Focus on current operations and pain points.
- Further large questions can be brought before the Tribal Modernization Core Team.
- Workgroup members offered to assist as future questions arise.

### Gaps

Three tribal nations were represented on this work group, and the participants had broad knowledge and experience with human services. Further conversations with Bois Forte, White Earth, and Red Lake may be necessary to ensure the breadth of programs are considered.

Additionally, the intention for this project, and other projects within the Modernization Strategic Plan, is to engage all tribal nations at some level. Therefore, in the future connections will be made and invitations extended to the remaining eight Tribal Nations located in Minnesota: Fond du Lac, Grand Portage, Leech Lake, Lower Sioux, Mille Lacs, Prairie Island, Shakopee-Mdewakanton, and Upper Sioux. DHS staff will apply the learnings from the workgroup and recommendations from the Office of Indian Policy and the Tribal Modernization Core Team as plans are developed for further engagement with tribal communities in Minnesota.

### Learnings to take forward

- Many of the key findings from this process will be used directly to inform preliminary requirements for the digital tools (website/landing page, online account, and social needs tool). The sharing and cross-sharing of information in this format led to some good ideas and points of consensus.

- Workgroup members provided insights from working directly with persons served that can be carried forward to future conversations with the tribal community.
- The robust harvesting process identified a number of items that require further follow-up with additional staff or with users and community organizations.
- The sessions covered a number of topics, and required a fair amount of explanation. We hope that for future focused conversations, there will be efforts to simplify and narrow in on key items. This is part the nature of an iterative process, but something that will be worked on in an intentional manner. The team will be incorporating improvement ideas provided by participants in the feedback post-sessions.

## Cultural and Ethnic Communities Leadership Council (CECLC) Focused Conversations

The Business Solutions Office at the Minnesota Department of Human Services (DHS), in partnership with DHS Community Relations, hosted a series of conversations with members of the Cultural and Ethnic Communities Leadership Council (CECLC).

### Purpose

- Share concepts and initial prototypes for community input and reaction related to a statewide digital Self-Service Social Needs Tool process and tools.
- Results will be used by the team to inform design of tools, processes and eventual IT requirements.
- Participants offer guidance to help direct future community engagement efforts.

### Topics

- **Overall concept** of a self-service digital experience to help people navigate human services resources based on their unmet needs.
- Accessible **website/landing page** where tools and information will be hosted in multiple languages, with help functionality.
- **Online account** functionality and associated trust, security and privacy issues.
- Unmet needs **questionnaire** and resulting **resource information**, communication options and connections to local resources and processes.

### Key findings

Overall and website design:

- Participants highlighted the importance of training organizations of all kinds on how to use these tools, even suggesting that training might be mandatory for certain groups. There was good discussion around the continued importance of navigation roles performed by community organizations to connect people to resources, and recognition that this tool can be valuable for users in that role. That group is also critical to a successful rollout in the future and potentially to helping maintain the tool's information integrity.
- Participants expressed that training and assistance materials are an important component for all new tools, and need to walk people through the processes step by step.
- Clear need and desire were expressed for written content to be presented in multiple languages beyond English – specific callouts were made for Hmong, Karen, Somali and Spanish.
- Participants emphasized the need for intuitive navigation and plain language. People seeking services are often in crisis, and the system places a large burden of knowledge and information-gathering on them. Designs need to reflect this and offer solutions.
- Participants reiterated the importance of engaging end users directly in the design and development process for the website, tools, and associated processes.

Social needs tool:

- Participants provided important feedback on wording of potentially sensitive questions.
- Participants suggested the tool could allow for a worker or a provider to manually add referrals to the list.

Online account:

- Participants suggested text alerts be a communication option for program renewals or documentation.
- Participants suggested that users need to be encouraged to share their data by clearly stating why it is needed and how it will be used. There was good discussion of different data sensitivities and issues of trust among different communities in relation to the government and DHS.

### Format and Process

- Rapid process; 4 sessions from 11/19/20-12/9/20.
- 2-4 participants per session.
- 1.5 hour sessions, via Webex online video conference.
- Human-centered design approach and methods (co-creation, group interview/listening, prototyping, harvesting, iterating).

### Participants

An overview of the project and proposed engagement process was presented to the full Council, and members volunteered to participate in the session series.

Name	Organization/Role	CECLC Appointed Member Representation (per “Membership” listing on <a href="#">webpage</a> )
Foua Choua Khang	Blue Cross and Blue Shield Community and County Liaison	Culturally specific human services providers
Marcia Bierschenk	DHS, Compliance Management and Policy (CECLC Member)	DHS employee
Alana Wright	MN Leadership Council on Aging (MNLOCA), Director of Equity and Operations	Culturally and linguistically specific advocacy groups
Amanda Koonjbeharry	Citizens League, Director of Public Policy	
TaShonda Williamson	Case Manager, The LinkMN	A human services program participant member representing communities of color
Danisa Farley	Neighborhood House, Food Support Specialist	Diverse cultural and ethnic communities
Petronellah Thomas Shanobi	KESMA Flame Lily LLC, CEO	Private industry with an interest in inequity issues
Dr. Jean Lee	Children’s Hope International	Faith-based organizations ministering to ethnic communities

## Process feedback, gaps, learnings

### Feedback

In addition to in-session discussion, a brief survey was sent following the conversations, asking:

- Did you feel like the session was a good use of your time, and did it meet your expectations? How can we improve the format, facilitation, or content of the session going forward?
- Would you be willing to participate in a future conversation? We'd love to check back in with you down the line, as we continue to develop the design.
- As we plan to talk with persons served, can you recommend colleagues and/or organizations that can help us connect?

Feedback was positive from those that replied, across all three questions, which aligns to comments made during sessions. Some respondents did follow up with additional contacts for future conversations, which have been noted.

### Gaps

Ongoing, substantial community involvement is critical to this work. Engagement with this initial group of CECLC member volunteers is a starting point and should not be interpreted as the entirety of our community engagement efforts for integrated services and the self-service social needs tool, or as a representative effort across cultural and ethnic communities.

### Learnings to take forward

- Work with different cultures to design the questions to see what works best for them.
- Have organizations (including faith communities) trained in how to use the social needs tool and website, for successful rollout and ongoing navigation and help for communities.
- Utilize a broad variety of communication and outreach tools for roll-out, including social media and word of mouth.
- Many of the key findings from this process are being used directly to inform preliminary requirements for the digital tools. The sharing and cross-sharing of information in this format led to some good ideas and points of consensus.
- The robust harvesting process identified a number of items that require further follow-up with users and community organizations.
- The sessions covered a number of topics, and required a fair amount of explanation. We hope that for future focused conversations, we can continue to simplify and narrow in on key items. This is in part the nature of an iterative process, but something we'll work on intentionally. We'll also look to incorporate the improvement ideas provided by participants in the feedback post-sessions.