

Strategic Plan

SFY 2017-2018



Financial
Services

DHS STRATEGY MAP

SFY 2017-2018

OUR MISSION

We improve the quality of life of vulnerable Oklahomans by increasing people's ability to lead safer, healthier, more independent and productive lives.

OUR VISION

DHS provides help and offers hope to vulnerable Oklahomans through stronger practices, involved communities and a caring and engaged workforce.

OUR VALUES

Safety • Integrity • Professionalism • Compassion



<p>We help Oklahomans who are vulnerable lead safer, healthier, more independent and productive lives.</p> <p>We will:</p> <ul style="list-style-type: none"> • Improve the well-being of the people we serve • Improve access to our services and benefits 	<p>Our workforce is informed, supported and engaged.</p> <p>We will:</p> <ul style="list-style-type: none"> • Promote safe, healthy work environments • Improve the effectiveness of our workforce • Continue to improve employee engagement 	<p>We are engaged with communities to meet the needs of Oklahomans who are vulnerable.</p> <p>We will:</p> <ul style="list-style-type: none"> • Build and strengthen community partnerships • Help Oklahomans who are vulnerable access community resources 	<p>We have a culture of continuous improvement.</p> <p>We will:</p> <ul style="list-style-type: none"> • Continue to improve the department's effectiveness, efficiency and accountability • Continue to evaluate the impact our services and benefits have on Oklahomans who are vulnerable
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Figure 1. SFY 2017-2018 Strategy Map

A Letter from the Finance and Administration Director

This Financial Services strategic plan for SFY 2017-2018 details the goals, objectives, actions and expected results that Financial Services will achieve over the next two years. Financial Services, by the nature of its work, plays a key supportive role in regard to the administration of each and every program within the Department of Human Services. Its importance in helping DHS leadership in sometimes reshaping, but always in delivering how the agency provides services to Oklahomans in need, cannot be overstated. Financial Services takes its financial fiduciary responsibilities seriously and is committed to working with the agency leadership under Director Lake to foster a culture of continuous improvement throughout the division and the agency as a whole.

This strategic plan represents a departure from the previous two-year strategic plan. Where the previous strategic plan was generally broad in scope, this plan is narrower and better defines both the actions to be taken and desired outcomes. We believe this redefined, tighter focus in all aspects of the plan will lead to more achievable results, thus benefitting the agency's divisions and the clients we serve, as well as our own Financial Services employees.

Winston Churchill may have best summed up the need for and the limitation of strategic plans if not really implemented when he said, "However beautiful the strategy, you should occasionally look at the results." Financial Services is dedicated to seeing that its plan is never just a document that sits on a shelf or a set of statements hanging on a wall, but that it becomes an integral part in the division's daily work life.

David Ligon

Director, Finance and Administration

DIVISION OVERVIEW

Financial Services is responsible for the oversight and maintenance of the Department of Human Services' financial resources. Specifically, this division, which includes eight distinct units, performs the following duties:

- Prepares the agency's annual Budget Request (Budget)
- Prepares and monitors the annual Budget Work Program (Budget)
- Monitors receipts and expenditures for all programs (Operations)
- Processes vendor and client payments (Claims)
- Produces financial reports and statements meeting state and federal requirements (Cost Accounting and Revenue Enhancement)
- Prepares the agency payroll (Payroll)
- Prepares all agency contracts and monitors all purchasing related to such contracts (Contracts and Purchasing)
- Distributes nutrition benefits and administers the Electronic Benefit Transfer (EBT) program for distribution of client assistance payments for Supplemental Nutrition Assistance Program (SNAP) benefits, Child Support Services client collections, Temporary Assistance to Needy Families (TANF) benefits and Aid to Aged, Blind and Disabled (AABD) payments
- Continually reviews and revises its internal financial processes and provides professional development to its employees (Business Transformation Office)

As a key agency support function, Financial Services interacts with groups and individuals both within and outside the agency in order to further the mission, vision and values of the Department of Human Services on a daily basis. In conclusion, Financial Services' goal is to provide excellent service to each and every person in a manner that exceeds the customer's expectation.

OUTCOME 1: Oklahomans lead safer, healthier, more independent and productive lives.

Goal 1: We will improve the well-being of the people we serve.

Objective 1: By December 2016, we will create a process that will enable us to monitor the distribution of SNAP cards and identify potential cases of abuse.

Action Plan:

By December 2016, we will create a process to centralize the printing and mailing of SNAP cards to clients.

By December 2016, we will create a process to monitor potential abuse of reprinting replacement SNAP cards and reduce associated costs.

Important Results:

- The decreased volume of client traffic in county offices for replacement cards
- The tracking of replacement cards mailed directly to individual clients

OUTCOME 1: Oklahomans lead safer, healthier, more independent and productive lives.

Goal 2: We will improve access to our services and benefits.

Objective 1: By January 2017, we will improve access to information and services offered by Financial Services to DHS employees.

Action Plan:

By January 2017, we will explore the feasibility of a web-based tool that would allow employees to access their W-2 Forms electronically.

By June 2017, we will streamline the timekeeping process to reduce duplication of effort and entry errors.

By September 2017, we will partner with Human Resource Management to increase the frequency of communication and quality of information available about retirement to all DHS employees.

Important Results:

- The decreased time for Payroll staff to distribute W-2 Forms to employees
- The number of Financial Services employees that report they have increased knowledge about the timekeeping process
- The number of DHS employees that report they have increased knowledge about retirement options and benefits

OUTCOME 2: Our workforce is informed, supported and engaged.

Goal 1: We will promote safe, healthy work environments.

Objective 1: Beginning August 2016, we will implement programs and activities that promote healthy staff.

Action Plan:

Beginning August 2016, we will establish a Quality Service safety subcommittee to address employees' safety concerns.

Beginning October 2016, we will launch the Check. Change. Control. program to promote heart health and reduced blood pressure for division employees.

Beginning February 2017, we will increase participation in "The Biggest Loser" contest to encourage employees to reduce total body fat percentages.

Beginning August 2017, we will partner with Risk Management to create an active shooter protocol for the third floor to promote a safe work environment.

Important Results:

- The increased number of division employees that report an increased knowledge pertaining to procedures related to workplace safety on the Quality Service survey
- The pre- and post-program results from the American Heart Association data that show division employees' blood pressure has improved at the conclusion of the program or is a consistent healthy rate
- The increased number of division employees who report they have the knowledge to maintain a healthy body weight
- The increased number of division employees who report they understand the documented active shooter protocol

OUTCOME 2: Our workforce is informed, supported and engaged.

Goal 2: We will improve the effectiveness of our workforce.

Objective 1: We will improve leadership development opportunities for our workforce through coaching, mentoring and cross-training, by September 2016.

Action Plan:

By September 2016, we will establish a Leadership Development committee.

By December 2016, we will explore options to enhance fiscal management learning opportunities for all interested DHS employees.

By January 2017, we will explore the feasibility of cross-training opportunities across work units so our workforce stays informed, supported and engaged.

By February 2017, we will implement the DHS Collaborative Coaching Initiative within Financial Services.

Important Results:

- The increased number of DHS employees who indicate the fiscal learning opportunities are helpful
- The increased number of participating employees who report their job skills have improved as a result of the employee exchange program
- The increased number of participating employees who report they have a better understanding of the work across the division as a result of the employee exchange program
- The increased feedback from employees who report relationships have improved across the division as a result of the employee exchange program
- The feedback from employees that report they have a the opportunity to impact how their work is performed as a result of the Collaborative Coaching initiative

OUTCOME 2: Our workforce is informed, supported and engaged.

Goal 3: We will continue to improve employee engagement.

Objective 1: We will improve employee engagement by encouraging Financial Services employees' personal development and employees' awareness of their value to fulfilling the mission of DHS beginning September 2016.

Action Plan:

By September 2016, we will establish Employee Engagement subcommittee to explore and implement ways to make the division a great place to work.

Beginning February 2017, we will develop and implement Collaborative Coaching to increase employee engagement.

Important Results:

- The employees feedback survey results show that employees' personal development is encouraged by their supervisor
- The employee feedback survey results indicate that our Collaborative Coaching model has a positive impact on employee engagement

OUTCOME 3: We are engaged with communities to meet the needs of Oklahomans.

Goal 1: We will build and strengthen community partnerships.

Objective 1: We will build and strengthen community partnerships by exploring opportunities to reduce our footprint without compromising Quality Service to our internal and external customers by September 2016.

Action Plan:

By August 2016, we will partner with BIS Software Company and the Office of Management Enterprise Services-Finance to better support the division's scanning functions.

By September 2016, we will partner with Support Services and Office of Business Quality to explore opportunities to pilot workspace alternatives within DHS.

Important Results:

- The successful transfer of scanned images from the AS400 to the BIS platform for housing electronic data
- The additional workspace created at select pilot locations without renting, purchasing or leasing additional space to house DHS employees

OUTCOME 3: We are engaged with communities to meet the needs of Oklahomans.

Goal 2: We will help Oklahomans who are vulnerable access community resources.

Objective 1: We will improve the efficiency of the Foster Care Wish List project so children in foster care can receive timely Christmas gifts by December 2016.

Action Plan:

By December 2016, we will partner with the Office of Community and Faith Engagement to make enhancements to the web-based tool that automates the process.

Important Results:

- User feedback results show the web-based tool is easier to use
- User feedback indicates the web-based tool reduces the need for manual data entry and increases the overall accuracy of the process
- User feedback indicates the web-based tool supports the ability to generate status reports immediately on-site

OUTCOME 4: We have a culture of continuous improvement.

Goal 1: We will continue to improve the department's effectiveness, efficiency and accountability.

Objective 1: We will ensure best use of funds by completing projects that focus on improving Financial Services' effectiveness, efficiency and accountability by June 2018.

Action Plan:

By February 2017, we will establish a process for electronic document destruction across Financial Services.

By June 2017, we will partner with other divisions to right-size phone equipment with actual use to promote cost savings.

By June 2017, we will consolidate the timekeeping function agency-wide to streamline process efficiency and promote best practices.

By December 2017, we will create a continuity plan to support job functions across Financial Services.

By June 2018, we will restructure Contracts and Purchasing under Financial Services and centralize similar job functions to reduce duplication of effort and minimize associated costs.

Important Results:

- The increased server space created by deleting documents beyond their retention period
- The cost savings as a result of right-sizing land line phone equipment, piloting the use of workspace alternatives and reducing the volume of Financial Services documents retained electronically
- Payroll employees report that the timekeeping function is more efficient and easier to understand due to implementing a standardized, consistent process
- The reduction in total staff hours required for timekeeping functions
- The reduced duplication of efforts by streamlining contract maintenance among divisions performing similar functions

OUTCOME 4: We have a culture of continuous improvement.

Goal 2: We will continue to evaluate the impact our services and benefits have on Oklahomans who are vulnerable.

Objective 1: We will create a time allocation system for DHS' Skilled Professional Medical Personnel (SPMP) that meets the requirements of our federal partners without adding hours of detailed time reporting for SPMP staff by September 2016.

Action Plan:

By September 2016, we will develop project requirements and implement Random Moment Time Study (RMTS) system for DHS' Skilled Professional Medical Personnel (SPMP).

Important Results:

- The improved time reporting process that allows SPMP staff more time to tend to client needs
- The increased ability to timely document work activities performed by SPMP that will ultimately maximize opportunities for federal revenue
- The increased time direct care staff are able to provide client services due to reduced administrative demands on their workloads

S16037DHS

Issued 8/2016

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