

2023 Management Evaluation Reviews

Statewide Results

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Agenda



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Management Evaluation Review (ME Reviews / MER) Overview, Target Areas, and Methodology

Slides 3-7



Purpose of the Management Evaluation Review



Federally Mandated Process

for State oversight of local agencies
administering FoodShare

**Systematic way to monitor
and assess** program operations,
giving an objective big-picture view

7 CFR § 275

Serves as a **basis for improving
and strengthening** project areas

Continuous communication
between local agencies, the state, and
FNS

ME Review Project Areas



Large areas
reviewed
annually:

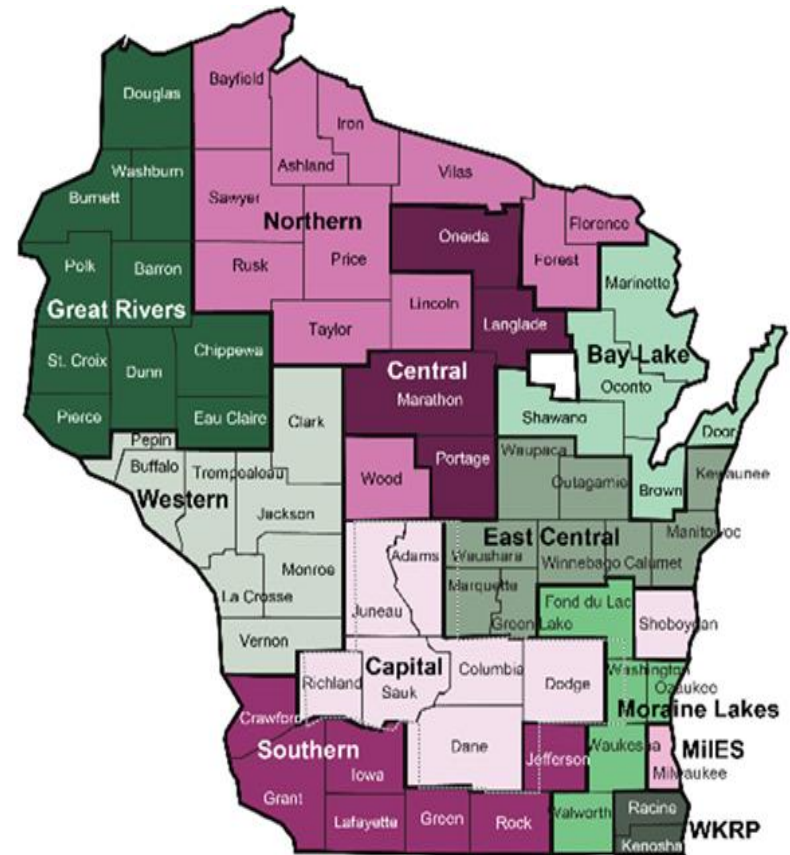
- 10 Consortia
- MILES

Medium
areas
reviewed
biennially:

- None in WI

Small areas
reviewed
triennially:

- 9 Tribal IM Agencies



2023 Target and At-Risk Areas



FNS designated priority areas reviewed

- Certification Processes and Access
- SNAP-Ed

State At-risk areas reviewed:

- Unwinding of COVID-19 Policy Waivers
- Recipient Integrity
- Able-Bodied Adults Without Dependents (ABAWD) Time Limited Benefits (TLB's), and Work Requirement

Methodology



Offsite

- **Certification case reviews**
- **SNAP, QCS, and IMMR reports data analysis**
- **Customer, Advocate, and Staff surveys**
- **Anonymous Calls**
- **Website Reviews**
- **4+ EBT Card Reports**
- **Permanent EBT Card Logs**



Onsite or Virtual

- **Building observations (signage / brochures / handicap accessibility)**
- **Lobby and front desk observation**
- **Entrance Meeting**

ME Review Results for Target and At-Risk Areas and Error Rates

Slides 8-14



Certification Processes and Program Access

Statewide Findings:

- ✓ *Most customers feel knowledgeable in certification actions*
- ☐ *Agencies show good accuracy, but some attention to details is needed*

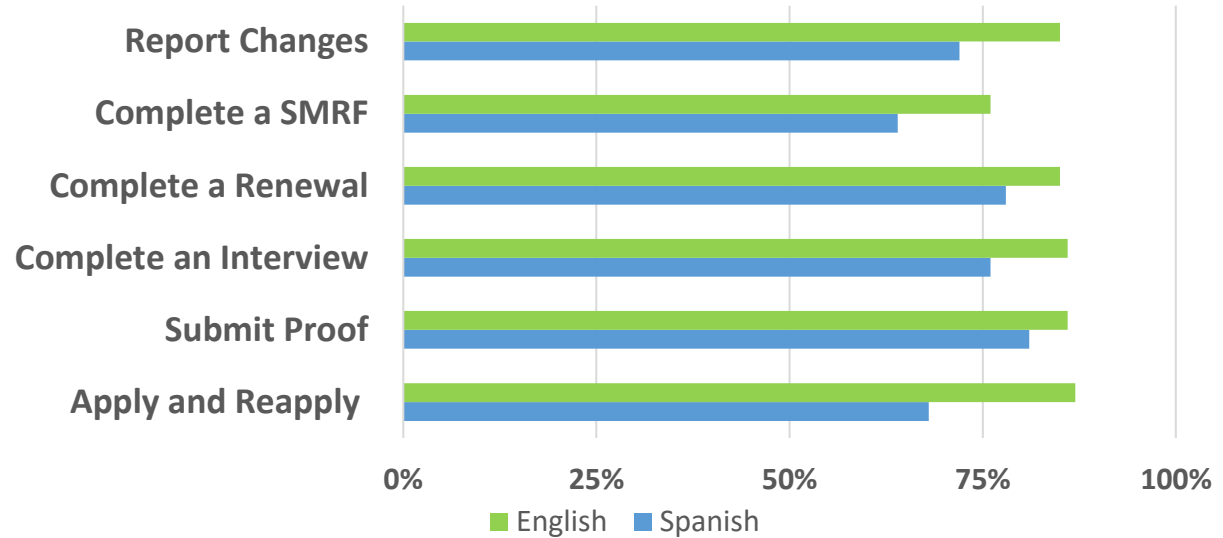


Reviewed:

- 20K+ Customer Surveys
- 300 Certification cases



Customer Survey Results



Certification Case Accuracy



- 268 Accurate Cases
- 32 Cases in need of Corrective Action



Snap-Ed (also Program Access & Customer Service)

Overall Findings:

✓ *Agencies provide accurate info and excellent service*

❑ *Few corrective actions*

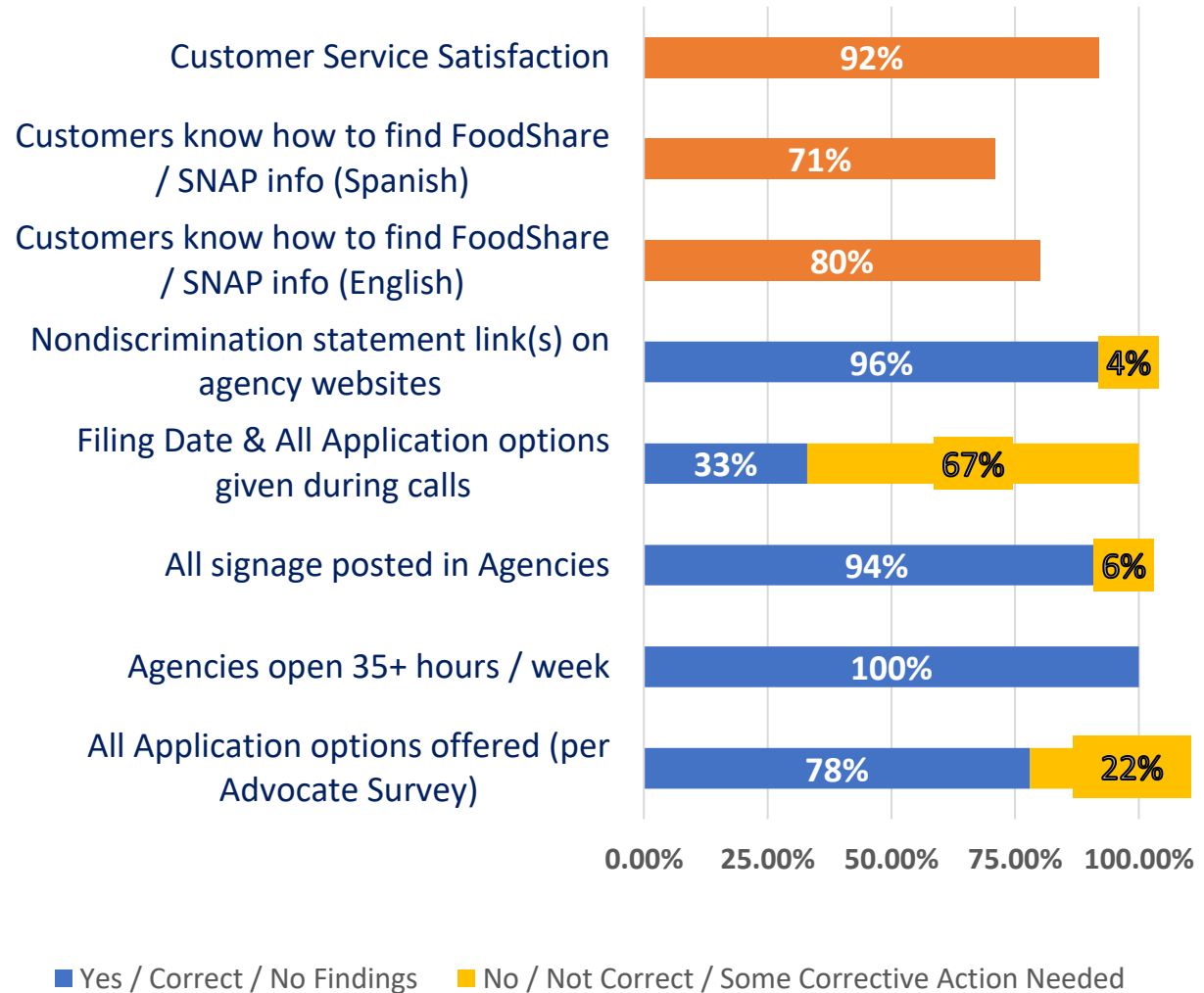
❑ *Reminder to explain filing date and application options*



Reviewed:

- 300 Call Quality Reviews
- 27 Agency Lobby Visits
- 20K+ Customer Surveys
- 171 Advocate Surveys
- 74 Websites

Calls, Lobbies, Surveys, and Websites:



Unwinding of Covid-19 Policies

Overall Findings:

- ✓ *Agencies have good policy knowledge*
- ✓ *Most customers read and understand notices*

❑ *Some corrective actions needed*

❑ *More time wanted for training & OM's*

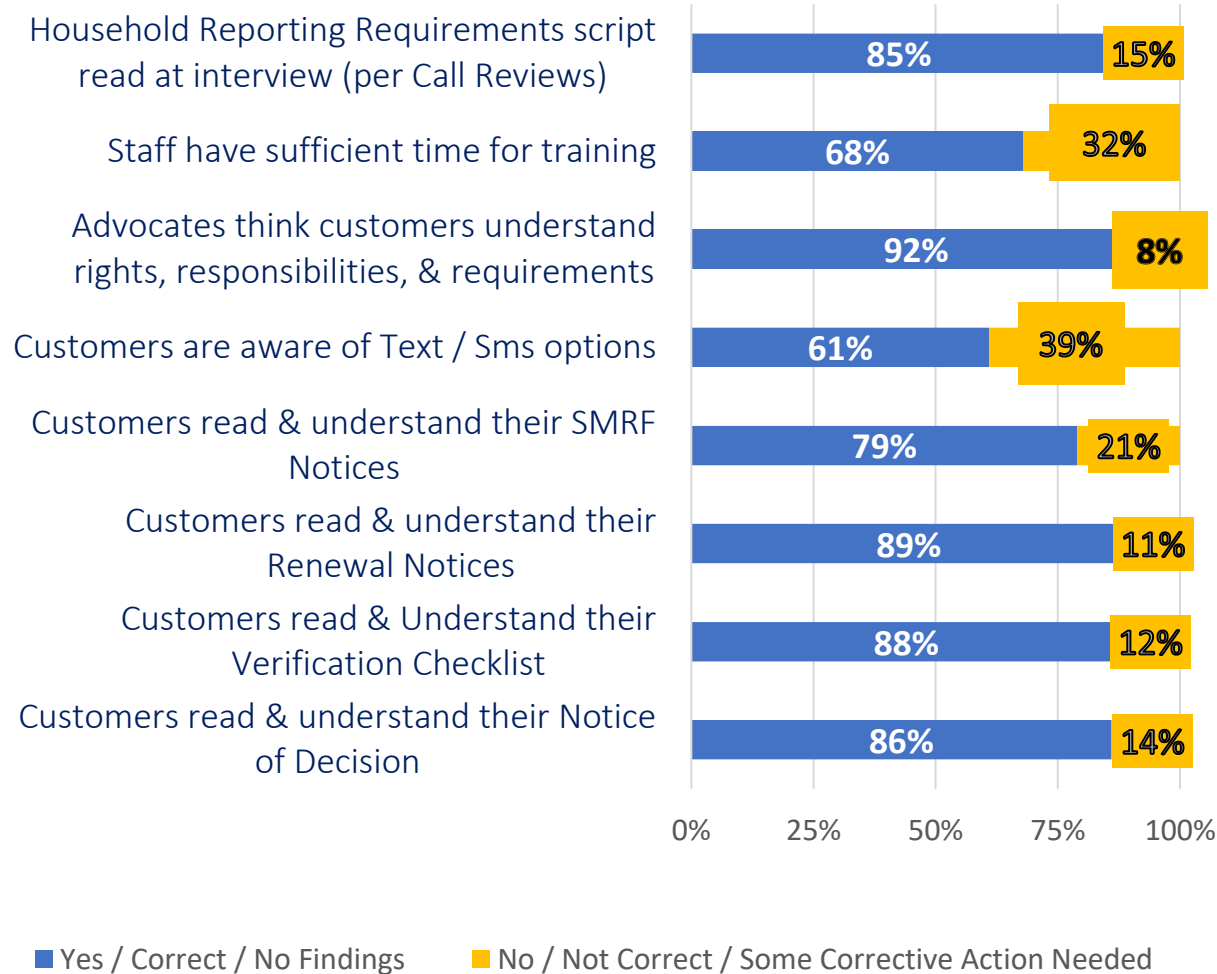


Reviewed:

- 300 Certification Cases
- 300 Call Quality Reviews
- 20K+ Customer Surveys
- 1156 Staff Surveys
- 171 Advocate Surveys
- FSQC Error Data



Case and Call Reviews, Surveys, and FSQC Errors (FFY2022):



Recipient Integrity

Overall Findings:

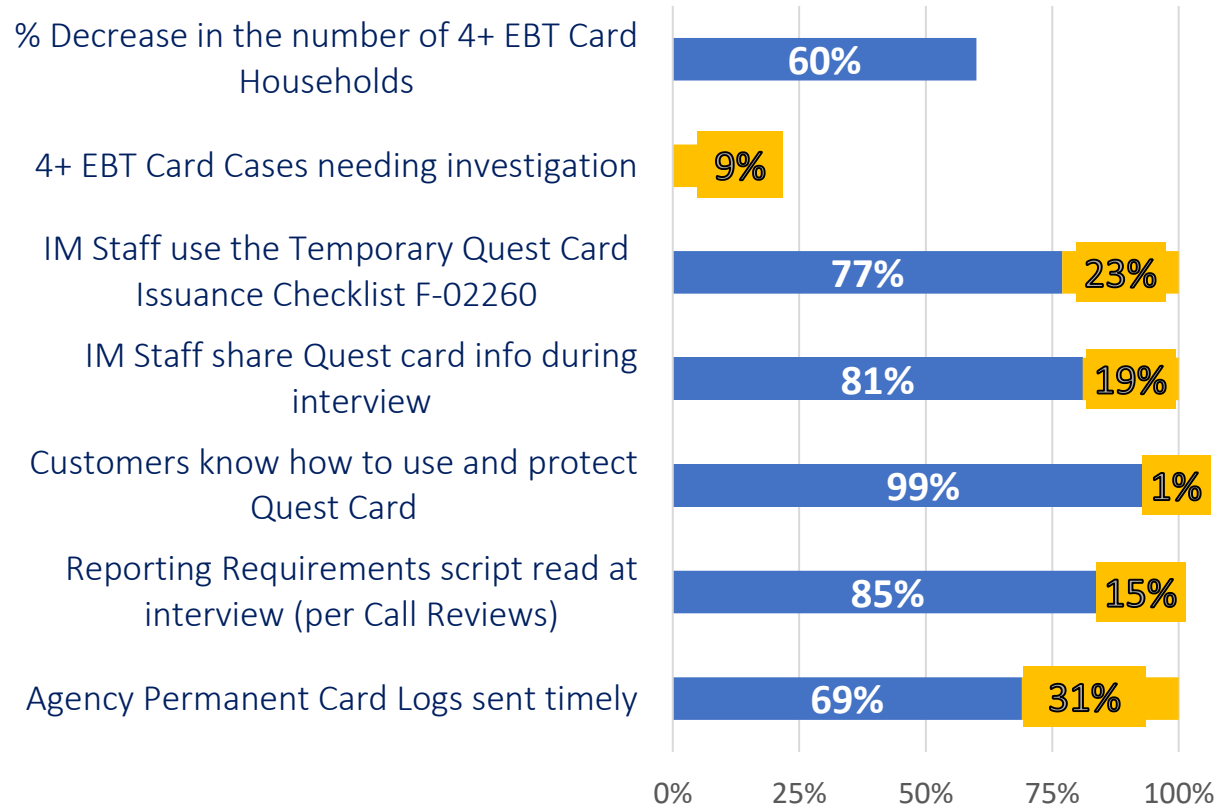
- ✓ *Agencies provide good Quest card info*
- ❑ *Corrective actions needed for some 4+ Card cases and timeliness of card logs sent to DHS*



Reviewed:

- 132 cases with 4+ EBT cards
- 27 Agency lobby Visits
- 300 Call Quality Reviews
- 20K+ Customer Surveys
- 1156 Staff Surveys

4+ Card cases, Agency processes, and Quest Card info for Customers



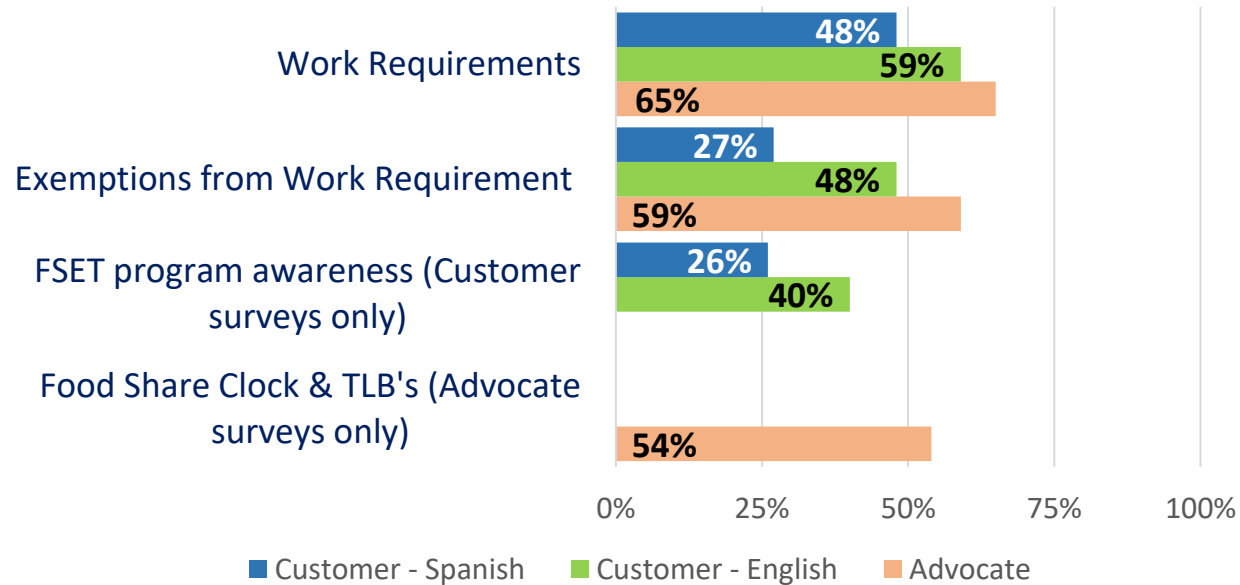
■ Yes / Correct / No Findings

■ No / Not Correct / Some Corrective Action Needed

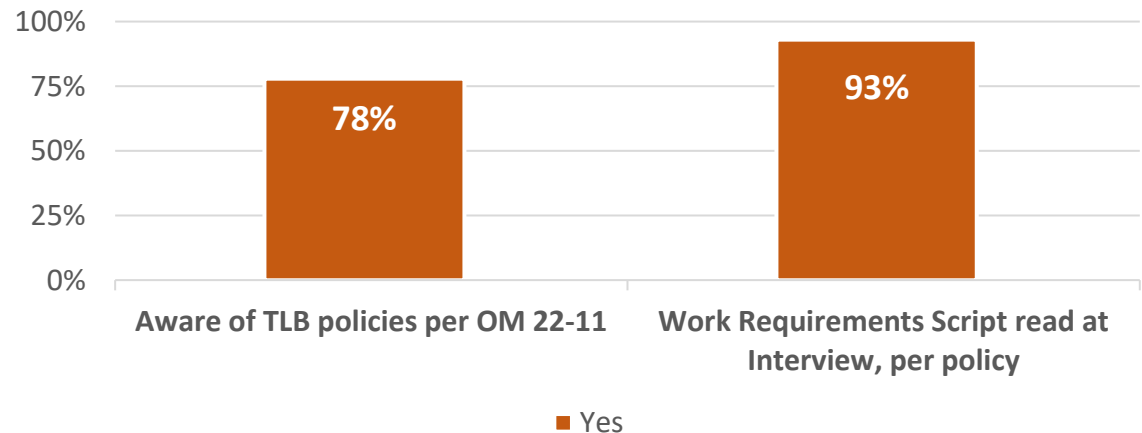
ABAWD's, TLB's, and Work Requirements



Customer and Advocate surveys:



Staff surveys:



Overall Findings:

✓ *Agencies working hard to implement ABAWD policies accurately*

❑ *Some room to improve Members' knowledge on ABAWD policies*



Reviewed:

- 20K+ Customer Surveys
- 1156 Staff Surveys
- 171 Advocate Surveys
- 74 Agency Websites

Active and CAPER Error Rates for 2023 MER's (10.2021 – 9.2022)



Active Errors	996 Cases Sampled	\$261,038 Issued
In Error:	63 cases	\$11,466
Payment Error Rate:	4.39%	
Case Error Rate:	6.33%	

Top Five Active Errors:

Wages & Salaries	\$7,874	68.67%
Shelter Deduction	\$1,169	10.20%
Standard Utility Allowance	\$547	4.77%
Self-Employment	\$527	4.60%
Student Status	\$439	3.83%

CAPER Errors	732 Cases Sampled
In Error:	204 Cases
CAPER Error rate:	27.87%

Top Five Caper Errors:

Verification	83 cases	40.69%
Notices	47	23.04%
Wages & Salaries	37	18.14%
Application	18	8.82%
Other	6	2.94%

Survey Results

Slides 15-19

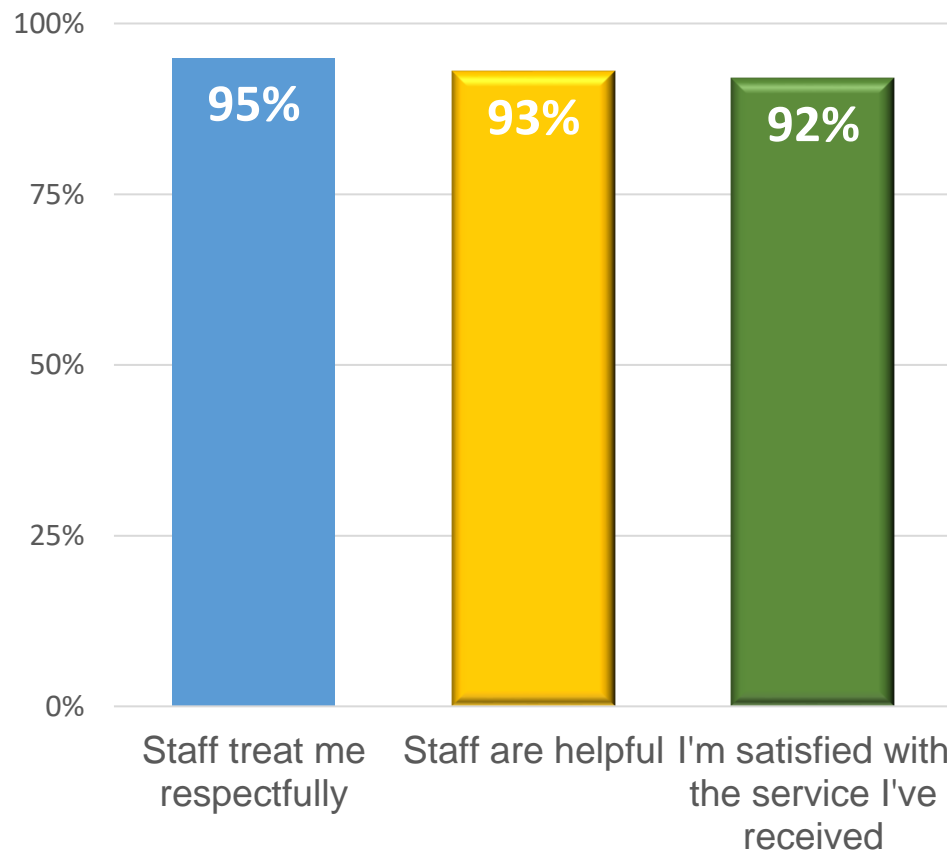
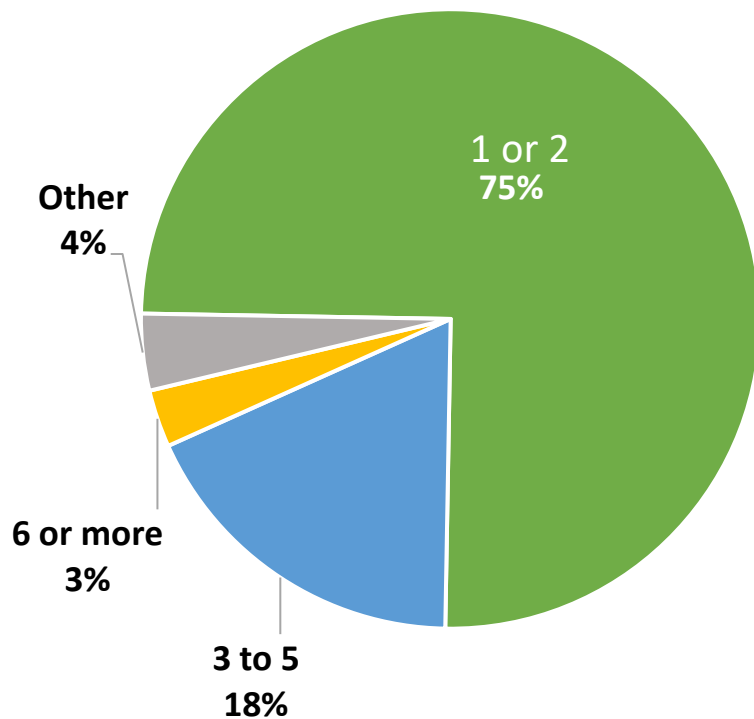


Customer Survey Results

20504 Responses

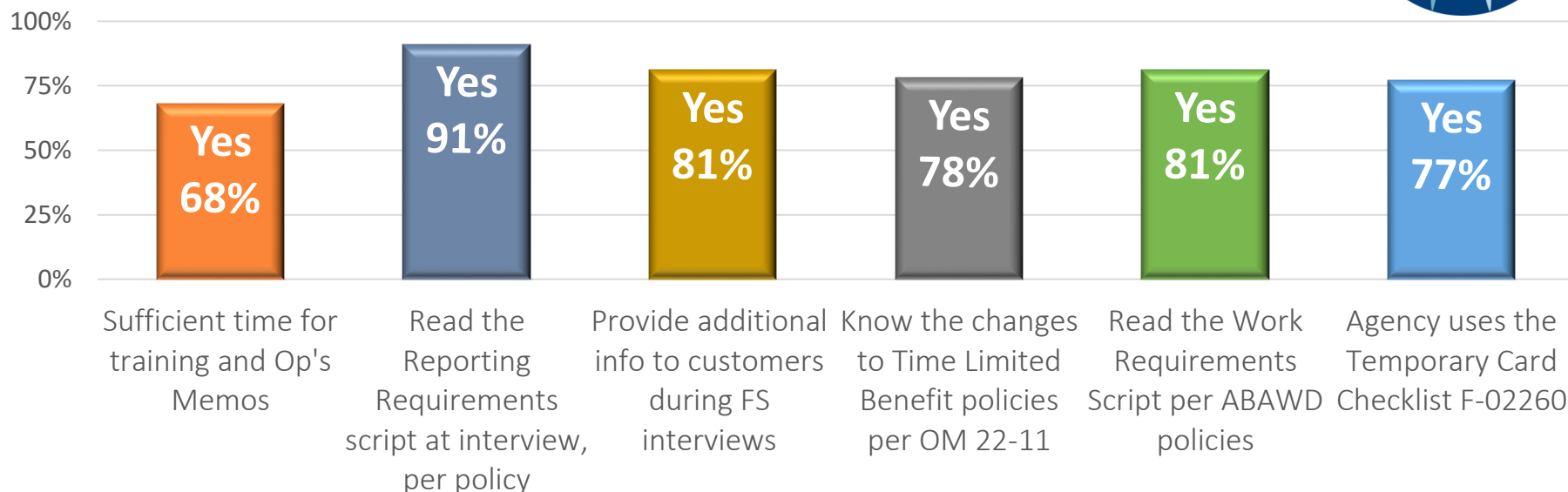


I speak with workers about my FS benefits this many times per year:

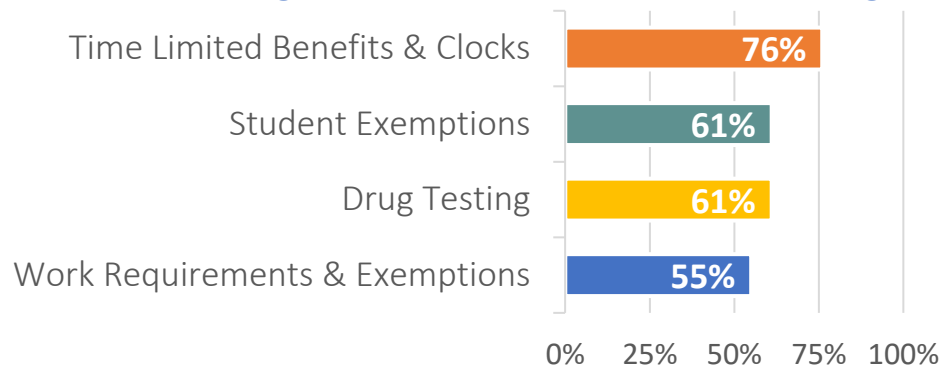


Staff Survey Results

1156 Responses



Covid Unwinding – Most Requested Training:

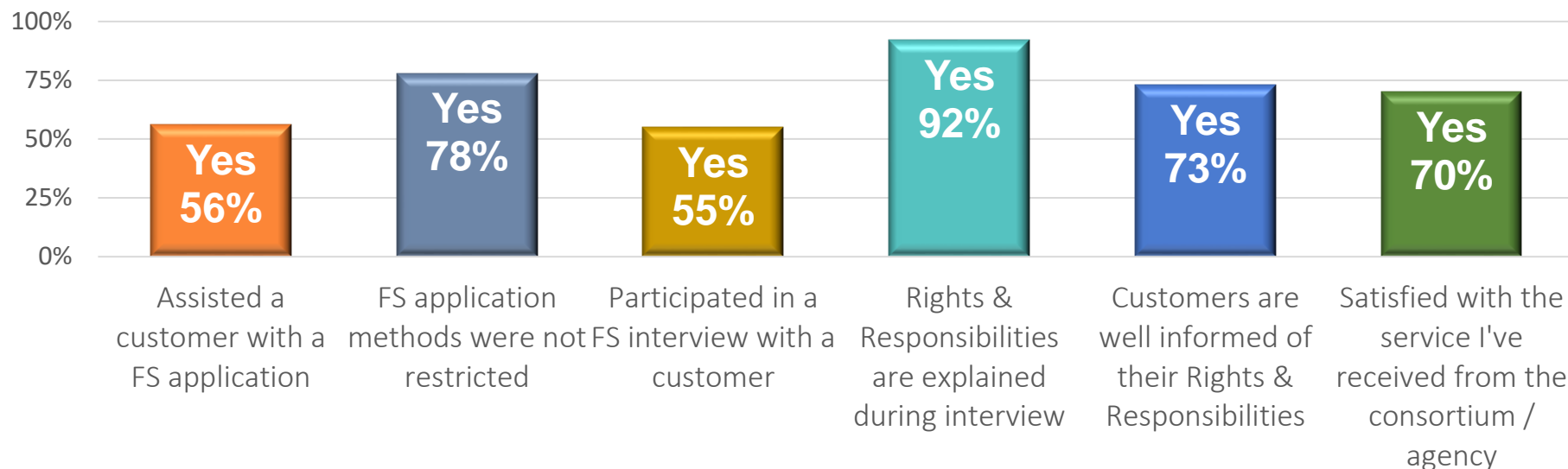


Most Common Errors, per Staff:

1. Income Budgeting
2. Case Comment issues
3. Verification issues
4. Not checking own work or budgets
5. Child Support calculations

Advocate Survey Results

171 Responses

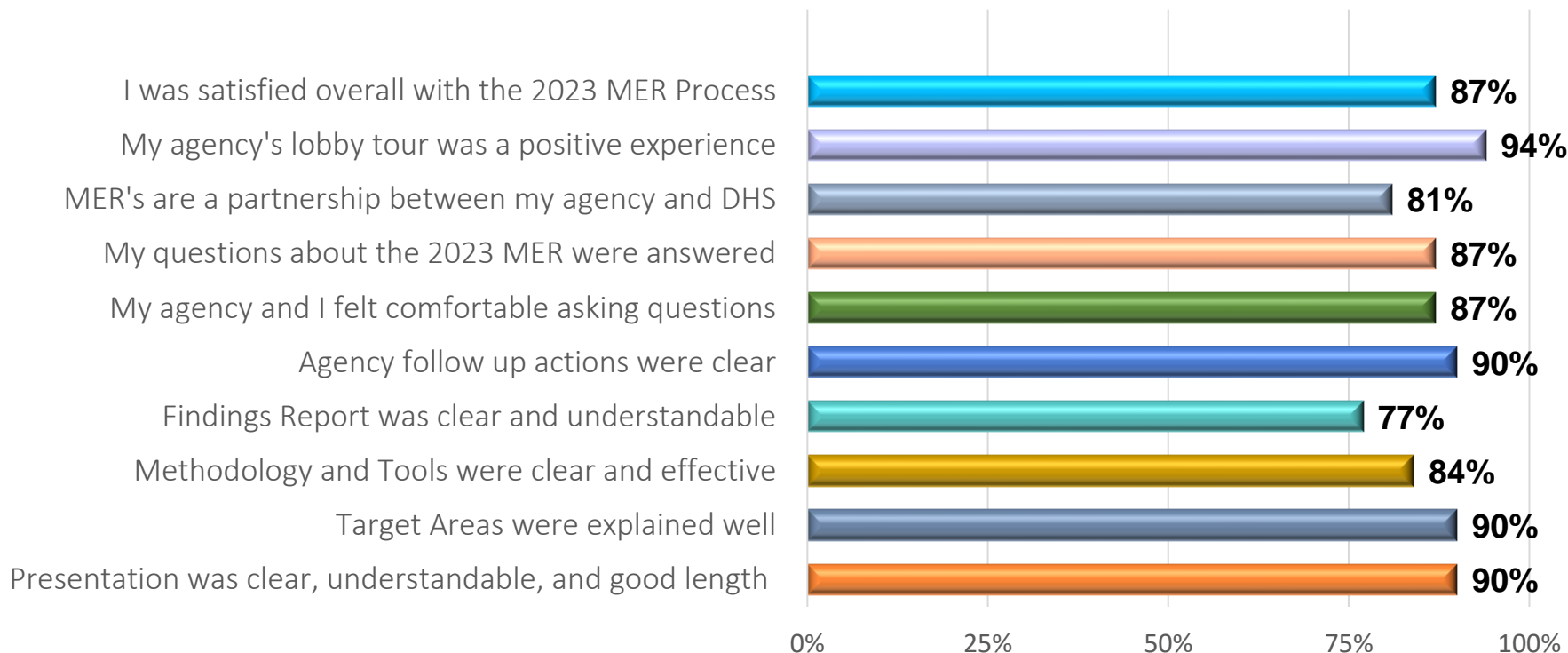


Advocate Suggestions & Feedback:

- Take time to interactively explain rules
- Offer in-person options to speak with workers
- Reminders in many ways: email, text, mail, etc.
- Simplify notices and make them more concise
- Reminders to read E&B Handbooks & Case Summary
- Invest in improvements to the MyAccess app
- Ensure consistent info and customer understanding
- Long call wait times are a barrier to getting & keeping benefits
- Most workers are very compassionate and knowledgeable, but more training could help some staff
- Share FSET info regardless of ABAWD status
- Share more info on where to use Quest cards and additional food resources

ME Review Process – IM Survey Results

31 Responses



IM Agencies Feedback and Suggestions for Improvement:

- Meeting virtually works well
- Send ME Review documents further in advance
- Include the Interaction IDs for Anonymous Calls
- Training time issues - any call center options?
- Reconsider methodology for Errors & Findings
- Give more explanation of Methodology
- Send out this survey right after the MER is completed

Summary, Recommendations, and Planning for 2024

Slides 20-25



Summary of 2023 ME Reviews



For the Consortia and MILES MER's:

- 44 Findings with Corrective Actions
- 23 Findings with Recommendations



Staff are compassionate, patient, and helpful, per Customer and Advocate Survey responses.

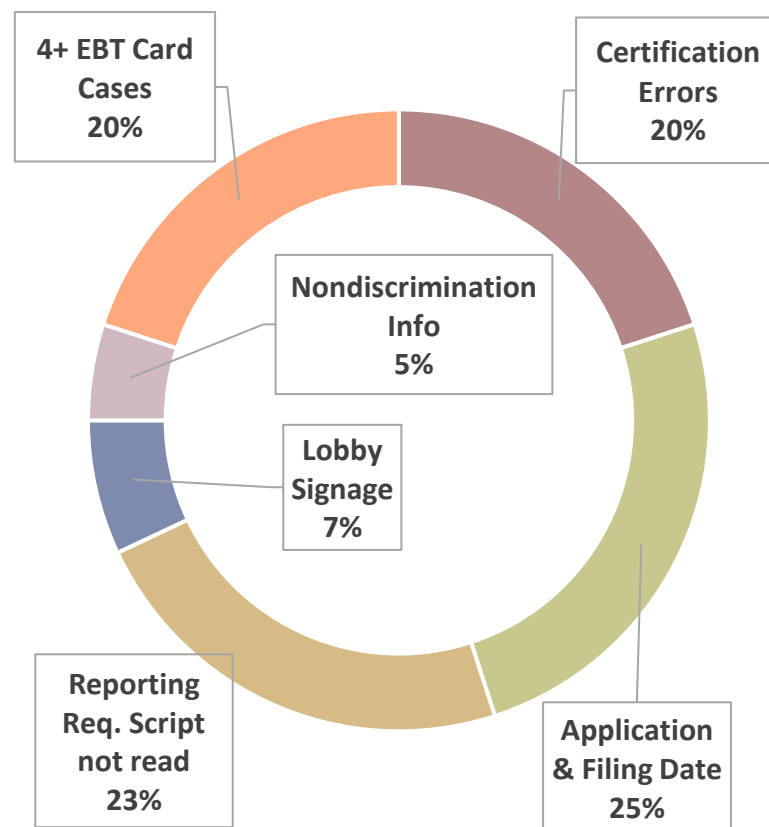


- Error Rates were below 6%
- Lobby observations, agency websites, and recipient integrity all improved

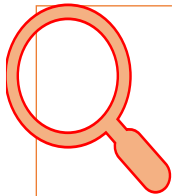


IM Staff have provided excellent customer service and accurate benefits as they navigate through the Covid-Unwinding period

Findings with Corrective Actions - % of all Findings:



Recommendations



Review Policy

- Review FS policy and all references in the Findings report with Staff



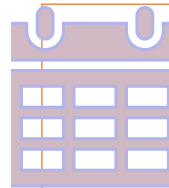
Agency compliance

- Review agency websites and lobbies to ensure proper signage and forms
- Add website links for Quest Card usage info and other resources.



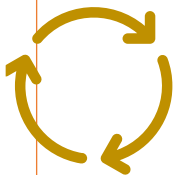
QC Errors & QA Checks

- Review and share all QC Errors and data with all staff, and on a 1:1 basis
- Create an internal QA process



Schedule time

- Plan time for OM's and training
- Allow time for questions, reviewing work, and accurate processing



Internal processes

- Have sustainable internal processes for backend work such as card log submittal, overpayments, etc.



Continuous Improvement

- Develop and follow an internal agency Continuous Quality Improvement plan.

2024 ME Review Planning: Tools & Timeframes



**Dec 2023 -
Feb 2024**

- Error Rate Data collected
- Detailed error letters compiled and analyzed
- Call and case reviews completed
- Agency lobby visits may be scheduled or begin
- Anonymous calls begin
- Agency emailed to update staff and advocate survey contacts

**Mar 2024 –
Sep 2024**

- Entrance Meeting letters & Invite sent 30 days prior
- Findings draft & documents emailed within 1 week prior
- Entrance Meetings held
- Final Findings emailed within 1 week after Meeting
- Agency response due within 30 days after Meeting
- MER Closure within 60 days after Meeting
- MER process survey sent

**Autumn 2024 -
Ongoing**

- Communication continues between IM agencies, DHS, and FNS throughout 2024, as needed
- Planning for next year's ME Reviews begins
- ME Review plans and tools to be used in upcoming year submitted to FNS in August / September

2024 ME Review Planning: Entrance Meeting Dates



Oneida Nation Tribal Agency	March 13
Stockbridge-Munsee Tribal Agency	March 20
Bay Lake	April 3
East Central	April 17
Northern	May 1
Moraine Lakes	May 15
IM Central	May 29
Western	June 12
Capital	June 26
MILES	July 17
Southern	July 31
Great Rivers	August 14
WKRP	August 28
Red Cliff Tribal Agency	September 11



Thank you

for your dedication and teamwork over the last year - and for making a difference in the lives of those you served!



Great Job!



Questions or Concerns?

We value your feedback!

Please feel free to contact me with any questions or suggestions for the MER process, and please complete the survey to share your input!

- Molly.Thomas1@dhs.Wisconsin.gov
- DHSFoodShareME@dhs.Wisconsin.gov
- [ME Review 2023 - Post-MER Survey for IM](#)
- 608.535.7316