

TSSC Project

Improving FRLS Intake Process

Background

- In September 2015, FRLS had our first meeting with TSSC to discuss the possibility of having them help with the Intake Process
- It is an initiative through the Florida Bar Foundation
- Lance Lewis, our Toyota TSSC contact, has worked with FRLS over the past 6 months gathering data, observing the intake process, training FRLS staff on the Toyota Problem solving Process, and working with FRLS on improving the intake process by decreasing the lead time between when an applicant calls in and when that applicant speaks with an advocate.

Toyota Philosophy (Applicable Points)

- **Customer First**
- **People are the most valuable resource**
- **Kaizen (continuous improvement)**
- **Shop Floor Focus**

Customer First

- **Every decision you make should have this in mind. No defect shall be passed to the customer.**
- **Meet Customer's exact order immediately.**

People are the most valuable resource

- 5 factors that affect a process
 1. Man
 2. Material
 3. Environment
 4. Machine
 5. Method
- Only People are capable of learning, creating, and problem solving
- People must be treated as the most valuable resource
 - ❖ Safe working environment
 - ❖ Job security
 - ❖ Intellectual challenge
 - ❖ Job that adds value
- Management's Role: Motivate and Develop

Kaizen

- **Continuous Improvement**
- **Continue to build on small improvements**
- **Over time trying to reach the ideal situation**

Shop Floor Focus

- **Shop floor provide proof a company's current condition**
- **Shop floor is where key value added activities take place**
- **Shop floor is constantly changing. One must be on the shop floor to understand the current status.**
- **Input from people on the shop floor is extremely valuable (who knows shop floor best?)**

Muda

- Any unnecessary elements in operation
- Main Categories
 - Overproduction
 - Waiting
 - Conveyance
 - Processing
 - Inventory
 - Motion
 - Correction
- Toyota believes that people have a finite amount of time and when you waste their time making them do unnecessary tasks you are not valuing their humanity.

TSSC Problem Solving Guide

- **Discovering problems are not trouble, but opportunities to improve**
- **Continuous problem solving is needed on the shop floor**
- **Problem solving created developed people which are an asset through unleashing people's endless capabilities and capacities.**

8 Step Problem Solving Method

1. Clarify the Problem
2. Break down the problem
3. Set a Target
4. Analyze the Root Cause
5. Develop Countermeasures
6. See Countermeasures through
7. Evaluate Both Results and Processes
8. Standard Successful Processes

Intake Process Problems Being Addressed

- **Too Much Lead Time**—taking days to get from the receptionist to the advocate
- **Not enough cases being screened**
- **Lack of Uniformity in the Screening Process**

Prior Intake System

- **Each office was responsible for screening its own cases**
- **Issues this caused:**
 - When Client screener was out, applicants were not being screened
 - In consistency in screening, each office had its own interpretation of the screening criteria
- **Each Office had its own way of assigning cases**
 - Cases would sometime sit with the screeners waiting for the managing attorney to instruct them on where to send the case

Prior Intake System:

- A Caller would call the office for services

Changes Made

- **Centralized the Intake**
 - Currently have at least three screeners screening for the entire program every day with ½ hour appointment times
 - Standardizing the process by updating LegalServer and creating a WIKI

- **Attorney of the Day**
 - Each office now has an Attorney of the Day (“AOD”). One Advocate from each office takes all of the cases that come to that office on an assigned day. Some cases are transferred to other advocates and some are kept by the AOD.

Migrant Unit

- Streamlined the screening process for field work
- Created a way to capture TIP Information in LegalServer



Improvements

- The actual numbers of cases that we are assigning to the offices has actually increased substantially since last year. Currently we are in day 264 of a 365 day year meaning we have gone through 64.5% of the year so far.
- Here are the numbers of cases assigned to each office last year and this year (YTD):

| Office | 2015 Entire Year | 2015 through August 23, 2015 | 2016 YTD Day 236 out of 366 |
|-----------------|------------------|------------------------------|-----------------------------|
| Fort Myers | 3720 | 2582 | 2880 |
| Fort Pierce | 1649 | 1235 | 1737 |
| Lakeland | 2604 | 1614 | 2232 |
| West Palm Beach | 1156 | 696 | 1396 |
| Totals | 9129* | 6127 | 8256 |

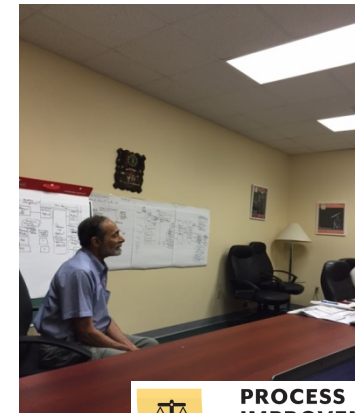
Another Look at the Improvement

| Office | 5-1-15 to 8-31-15 | 5-1-16 to 8-31-16 | Difference in # of Cases |
|-----------------|-------------------|-------------------|--------------------------|
| Fort Myers | 925 | 1039 | + 114 |
| Fort Pierce | 526 | 742 | + 216 |
| Lakeland | 445 | 773 | + 328 |
| West Palm Beach | 283 | 582 | + 299 |
| Totals | 2179 | 3136 | + 957 |

The projected amount of cases for 2016 should be around 12,800 cases this year which is well above what FRLS did in 2015.

Lance assigned management to work on problems in their own areas.

- **Some Examples are:**
 - Working on the wait time for scanning documents into the system when multiple people need
 - Increasing the quality of the intakes being done by Client Screeners
 - Decreasing the time that an Applicant is Screened to when that Applicant speaks with an Advocate



TSSC Video

- <http://www.tssc.com/nfp-cbs-vid.asp>