



SOCIAL SERVICES ADVISORY BOARD CALFRESH WORK GROUP RECOMMENDATIONS UPDATE

March 14, 2013

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INTRODUCTION

In December 2010, the Social Services Advisory Board (SSAB) submitted its recommendations to improve the overall performance of the CalFresh Program to the Board of Supervisors. In March 2011, the Health and Human Services Agency (HHSA) reported to the Board on their review of the recommendations, which concluded that all but one of the suggested actions would be adopted and some would require further study. Significant progress has been made on the recommendations. Forty three of the sixty nine recommendations have been implemented, as well as an additional ten implemented items which have been identified as an ongoing process. HHSA has identified thirteen items which are currently in progress, two items which have alternative processes and one item which is pending.

Meanwhile, challenges related to the CalFresh Program persist. HHSA's most recent Accuracy Rate – the figure used to determine how accurately staff process cases to determine eligibility was 92.72%, slightly below the federal requirement of at least 94%. Similarly, HHSA's Negative Error Rate – the figure used to determine if staff denied benefits correctly was 35.56%, which is above the State's threshold of 8%. These statistics reflect the period from October 2011 through September 2012, which was reported in January 2013. The County of San Diego is committed to improving its current performance and ensuring overall program integrity remains a top priority.

HHSA's efforts to strengthen its CalFresh program continue to focus on the four key pillars outlined in *Live Well, San Diego!*: 1) Building a Better Service Delivery System, 2) Supporting Positive Healthy Choices, 3) Pursuing Policy and Environmental Changes, and 4) Improving the Culture from Within County Government. All of the SSAB recommendations are addressed through one of these four pillars outlined in the *Live Well, San Diego!* strategy. Progress to implement changes will continue by using data-driven analysis, planned deployment, continuous improvement to adjust new practices and system-wide integration of established methods.

This update is organized by the four pillars of *Live Well, San Diego!* Under each pillar are the relevant recommendations along with the progress and accomplishments made in 2012.

As of December 2012, more than 256,949 San Diego County residents participate in CalFresh, which reflects a 20.3% increase since receiving the recommendations from SSAB. HHSA is firmly committed to continuing its work with SSAB and the community to complete implementation of these recommendations and improve the health and well-being of those served by the CalFresh Program. The following pages outline the progress made in 2012 by HHSA in meeting the Advisory Board's recommendations.

2012 Progress

I. BUILDING A BETTER SERVICE DELIVERY SYSTEM

Building a better service delivery system is essential to a healthier community. The CalFresh Program provides essential benefits that support good nutrition to vulnerable individuals and families in San Diego County, and is therefore a critical component to regional efforts to improve health outcomes.

The SSAB recommendations highlighted several areas to focus on to build a better service delivery system, including:

- Improving local infrastructure;
- Enhancing collection and deployment of operational data, and;
- Ensuring staff is up to date on policies and procedures.

Below are updates on progress in these areas.

Improve local infrastructure to support expanded access to CalFresh Program

SSAB recommendations identified key points in HHSA's local infrastructure to increase the system's capacity to meet the growing need for supplemental nutritional assistance. These included expanding the ACCESS Customer Service Center, addressing the document imaging system and increasing access to languages across the system.

In March 2012, 10 work groups, identified as Tiger Teams, were formed to identify necessary improvements in the eligibility operations system. These groups began reporting their progress on a monthly basis beginning in March 2012. The teams were instrumental in determining potential enhancements and many of their recommendations have been implemented and are included in this report.

Progress on increasing capacity at ACCESS (Recommendations 34, 37, 61, & 62):

- In 2012, ACCESS staff answered 547,393 phone calls which represent a 26% increase or 113,118 additional answered calls over 2011.
- Effective December, 2012, a total of 46 additional fulltime call agents reported to ACCESS from the new Medi-Cal/CalFresh and CalWORKs/CalFresh Initial Trainings for new hires. There are currently 116 Human Services Specialists (HSS) assigned to ACCESS.
- *ACCESS self-service feature* was enhanced to allow customers to update their telephone number and check the status of Quarterly Reports without the

assistance of a call agent. This enhancement has been instrumental in reducing wait times. In 2012, a monthly average of 12,726 calls were diverted to the self-service feature tool which represents a 15% increase over last year.

Progress on improving document imaging system (Recommendations 7, 33, 40, 45, 59, & 68)

- In August of 2012, The Mail Imaging Center (MIC) moved to East Region and changed its name to the Document Processing Center (DPC). As of December 31, 2012 the DPC has imaged 1,645,203 documents since its inception in September 2011.
- In September 2011, HHSA was awarded nearly \$900,000 federal SNAP (CalFresh) Participation Grant to help implement the Customer Relations Management (CRM) technology to track documents throughout the system. The CRM Project is currently anticipated for release later in 2013 at which time the Imaging Project is complete and the tool will interface with the new software. Once in place, case work (like processing applications and status reports) will be automatically assigned to specific workers, and progress on completion of assignments can be tracked from a single point in the Agency, as well as by customers.
- In 2012, The Family Resource Centers (FRCs) implemented ambassadors in the lobby to act as a customer service agent. These eligibility workers are available to answer questions, ensure that documents being submitted are scanned promptly and to provide a receipt for those documents.

Progress on increasing language access across the system (Recommendation 39)

- In September, 2012, The County's Department of Human Resources along with HHSA Human Resources combined efforts to conduct a targeted recruitment for HSSs to attract candidates who are bilingual in Spanish, Somali and Arabic. As a result, the Agency received 1,119 applicants who responded to the Spanish option, 73 applicants for the Somali option and 227 applicants for the Arabic option.

Enhancing collection and deployment of operational data
(Recommendations 1, 5, 13, 14, 15, 16, 17, 18, 19, 20, 22, 35, 42, 44, 51, 65, & 67)

CalFresh is reflected in all levels of HHSA's planning and measurement – from long-term strategic planning to day-to-day office management. Several of SSAB's recommendations call for improving organizational use of data in administering the CalFresh program. Below are examples of how CalFresh figures into HHSA's

multiple levels of planning and performance management.

- In May 2012, representatives from the ACCESS, FRC Operations, Information Technology and Training teams made a site visit to Orange County. The purpose was to learn about Orange County's model for integrating call center and office operations as well as new strategies for addressing the error rate. Other County visits have been scheduled and an analysis of the best practices will be conducted to determine how to apply them in our County.
- CalFresh reports are provided to supervisors and managers, with the expectation that they use the data to make informed operational decisions. Daily reports include Pending Cases Reports (Regular and Expedited) and Timely Disposition Reports, which are used to monitor progress and performance towards achieving the State target of 90% for timely dispositions. San Diego County performed at an average rate of 91% timely disposition of CalFresh applications in 2012.
- Monthly statistical reports related to local CalFresh trends are continually made available to the public online at:
http://www.sdcounty.ca.gov/hhsa/programs/ssp/ssp_progtrend.html
- Effective December 2012, the average wait time for the ACCESS Call Center was fifteen minutes and thirty-eight seconds (15:38) which reflects a reduction of more than half (38:54), from October of 2011.
- In December 2011, new pre-hearing case review procedures and a pre-hearing review checklist was implemented in order to resolve Appeals at the lowest level possible and to avoid customers going through the Appeals process unnecessarily.
- In October 2012, new supervisors were hired and deployed to the FRCs. All supervisors were trained in the new Case Review System on how to identify common errors, trends and possible causal factors in order to prevent and eliminate potential errors from occurring. The newly hired supervisors were trained on available reports and how to utilize them in the Essentials of Supervision class conducted by TKC and as a result are conducting supervisor reviews that are aligned with Federal and State Quality Control Reviews.
- Emerging error trends which are identified in Quality Control reviews are discussed at the monthly Eligibility Training Steering (TSC) committee meetings. TSC identifies and prioritizes the training needs for HHSAs's training department, The Knowledge Center (TKC). TKC then develops and provides the training to the FRC staff.
- The County is currently hiring Operational Research Analysts who will be reporting to the Office of Business Intelligence.

Ensuring our staff is up to date on policies and procedures

County of San Diego Eligibility staff is responsible for administering accurate and timely self-sufficiency benefits to eligible applicants and recipients. To support them in meeting that expectation, it is the responsibility of HHSA to provide clear and timely instructions, as well as appropriate initial and ongoing trainings. SSAB's recommendations called out the need to review existing methods for communicating CalFresh policies and procedures to ensure our staff are up to date.

Deliver Skills-Based Trainings Related to CalFresh (Recommendations 4, 23, 48, 49)

HHSA's The Knowledge Center (TKC) is the organization's training department, and is responsible for delivering all Initial Training to new HSS staff, as well as ongoing skills-training. During 2012, TKC delivered the following in person trainings:

- CalFresh Initial Training curriculum, including navigation of CalWIN in administering new and ongoing CalFresh benefits, as well as staff expectations.
- CalFresh Fundamentals training was delivered as a either a new program or a refresher to their existing knowledge of CalFresh and CalWIN.
- CalFresh Training on how to determine Reasonably Anticipated Income.
- Staff received training in Shelter Deductions for the CalFresh Program, including how to correctly process and ensure the Excess Shelter Deduction is being used along with the deductions for utilities.
- Household Concept included the treatment of excluded HH member's income and deductions in the program

TKC also developed self-guided training through our online Learning Management System. In 2012, the following trainings were available online:

- Negative Action training
- CalFresh Student Eligibility training
- CalFresh Non-Citizen Training is currently in development for 2013

Due to the operational challenges of delivering training to call center staff, ACCESS coordinates trainings onsite and staggers the scheduling of staff to minimize the impact to our customers. The following CalFresh trainings were delivered in 2012 to ACCESS agents:

- May 2012, Student Eligibility and CalFresh
- February 2012, Non-Citizen & Sponsorship training

Update CalFresh Resource Material (Recommendations 9, 10, 11, 21, 24, 25, 26, 27, 28, 29, 41, 46, 50 & 52)

- To ensure workers have one place to find CalFresh Program rules, HHSA incorporated 61 Special Notices and 6 Policy Inquiries into the CalFresh Program Guide (CFPG). All new instructions are now issued via the program guide, unless they involve a limited-period change.
- The CalFresh Student Guide was revised to ensure compliance with Federal, State and County rules in May 2010 and again in July 2011. Further clarifications were added in September 2012.
- HHSA is currently in development of an online eligibility forms directory which will create a centralized library of required forms. It is anticipated that this worksite will be in place beginning September 2013.
- A new Google Search feature was added to the CalFresh Program Guide to assist staff in searching for policy assistance in administering CalFresh benefits.

CalFresh Program, Eligibility Operations, and the overall self-sufficiency system will continue to work together to update resource materials and communicate additions and changes to frontline staff in a way that is timely and clear. Feedback from community partners will be a valuable source of information to help identify ways to do this better.

II. SUPPORTING POSITIVE HEALTHY CHOICES

Supporting positive, healthy choices is about enabling our community to make the healthy choice the right choice. Because the healthy choice is not always the easy choice, it is critical to remove barriers to making the right choice. SSAB's CalFresh recommendations related to supporting positive, healthy choices include:

- Increasing information regarding CalFresh to the public.
- Improving accessibility of application process for CalFresh benefits throughout the region.

Below are updates on our progress in these areas.

Increasing information regarding CalFresh to the public (Recommendations 43 & 63)

Additional SNAP-Ed funding was secured by HHSA beginning October 2012, which represents a four year grant in the amount of \$12.8M for Public Health Services and \$350,000 funding for Social Services for this current federal fiscal year. The grant will be used in coordination between Self-Sufficiency and Public Health Programs to implement community nutrition interventions that educated CalFresh participants on making healthier choices within their limited budget.

HHSA has developed ongoing relationships with CalFresh partners to promote information regarding the CalFresh Program, including:

- As part of nutrition education, 10 bus stop shelters in low-income San Diego areas were displayed featuring information about healthy choices and CalFresh from September 17, 2012 through November 25, 2012.
- In 2012, HHSA held a free **Farmers Market Workshop** engaging local market managers on the benefits of allowing EBT at their markets. As a result of collaborative efforts between HHSA, The Ecology Center, and the market managers, the number of Farmers Markets accepting EBT increased from 4 to 14 markets. CalFresh flyers and materials were distributed at many of these locations as well.
- HHSA staff that work in Child Welfare Services (CWS), Public Health Services, Family Resource Centers (FRCs), and Community Health Promotion (CHP) have provided thousands of flyers with nutrition information and CalFresh in a variety of venues.
- Public Health nursing staff provided CalFresh information while conducting home visits, including over 600 military contacts at Camp Pendleton.
- Child Welfare Services staff included flyers in emergency resource packets which

included information about CalFresh.

- Posters and flyers are posted in Public Health Clinics, Child Welfare, Behavioral Health Services lobbies, and County libraries.
- Aging and Independence Services promotes nutrition and CalFresh to seniors at events and nutrition education classes.
- **The Grandparents Raising Grandchildren Conference** was held in April 2012. Hundreds of grandparents took part in educational workshops and took home a handbook created specifically for them, both of which included, among many other resources, information about applying for CalFresh to provide for the nutritional needs of their grandchildren and themselves.
- In June 2012, HHSa sponsored the ***Live Well, San Diego! Summit, Building Better Health Across the Ages***. This event promoted the importance of health and good nutrition and aimed to leverage the talents and experience of older adults to encourage younger generations to address pressing health and social issues. CalFresh outreach materials were provided along with workshops and classes on cooking.

HHSa staff showcased nutrition, healthy choices and CalFresh with the following partners:

- During the annual Community Health Improvement Partners' (CHIP) **Depression Screening Week** where residents had the opportunity to visit designated sites to receive free, anonymous, depression screening.
- **Neighborhood Healthcare Health Awareness Day for Youth and Families** which provided families with a variety of resources including application assistance for CalFresh.
- **The Rural Health Network**, a collaboration of rural health providers and community partners.
- **HealthLink North County**, a collaboration of school health providers and advocates for children's health.
- **Women's Resource Fair**, an annual event for over 800 women including more than 300 children who received medical, legal and social services from more than 100 organizations.
- **Julian Backcountry Collaborative**, a Grass Roots collaboration of representatives serving homeless and needy individuals and families.

Improving access of application process for CalFresh benefits throughout the region

(Recommendations 43 & 66)

HHSa continues to promote the use of electronic applications to CalFresh through

use of telephonic signature for applications received over the phone and online applications received through Benefits CalWIN (BCW). From January 1, 2012 to December 31, 2012, San Diego County received:

- 3,650 CalFresh One-E-Applications
- 29,774 CalFresh BCW applications

HHSa worked with community partners to assist with application assistance activities at community events. On November 29, 2012, the following partnerships were recognized by the San Diego Hunger Coalition for exemplary work in collaborating to improve CalFresh access in San Diego:

- 2-1-1 San Diego and the ACCESS Customer Service Center
- Chula Vista Community Collaborative and the South Region FRC
- Chaldean Middle Eastern Social Services and El Cajon FRC
- Expanded use of video interviewing, using web-based technology to allow workers and customers to conduct interactive interviews at different locations. In 2012, video interviewing was expanded to all regions of San Diego County.
- The Dreams for Change Mobile Food Truck, ***The Fresh***, has been up and fully operating since June of 2012. The truck offers low cost, nutritious meals to homeless, elderly and disabled individuals who are using their EBT. Dreams for Change has also have placed social work interns with the truck to provide outreach services and resources to the homeless individuals served. HHSa staff is assisting individuals with CalFresh applications and are beginning to work with our local FRC office to mainstream the application process.
- In July 2012, the Agency applied for a 2012 SNAP Participation grant using a community-based model in which mobile technology, including lightweight laptops and portable scanners, would be used by community partners to create 120 new online access points in the community to apply and recertify for CalFresh. Although the Agency was notified in September that the application was not approved for funding, the County will continue pursuing this project in the future.

CalFresh will continue to play a vital role in the efforts to improve health outcomes in San Diego County. Focus will remain on both the internal partnership between social services and public health in improving access to good nutrition in the region, as well as on the growing collaborative network working towards improving understanding of and access to CalFresh benefits.

III. PURSUING POLICY AND ENVIRONMENTAL CHANGES

By continuing to review policies, procedures and facilities to better impact health outcomes, HHSA can create sustainable change in the region that supports healthy living. It is important to note, however, that major policy changes related to CalFresh are driven by the State of California, which sets policies for the program. Below are updates on our progress in these areas.

Review of CalFresh policies and procedures (Recommendations 30, 38, 47, 55, 56, 60, 64 & 69)

In August 2012, more than 381 customer surveys were collected across the Agency gauging feedback on a variety of service-related issues, including staff courtesy and program knowledge, office environment and overall satisfaction. Survey teams collected responses at all 10 Family Resource Centers (FRCs) during the end of July and beginning of August. Analysis of the responses provided valuable feedback to the Agency and established a baseline for customer satisfaction. The results of the survey indicated that:

- 60% of customers reported their visit was one hour or less
- 91% agreed that the staff who assisted them were courteous
- 89% agreed that the staff were knowledgeable and easy to understand
- 79% agreed the office was professional and welcoming
- 83% agreed they were satisfied with their experience that day
- In March 2011, HHSA began accepting quarterly CalFresh status reports and annual recertification paperwork through Benefits CalWIN (BCW), the online web portal. From January 2012 through December 2012, San Diego received 1,193 CalFresh status reports (QR7s) and 86 recertifications (RRRs) through BCW. Future outreach efforts will focus on promotion of BCW for applications, recertifications and status reports.
- In September 2012, the Agency expanded the certification of homeless households from four months to twelve months in an effort to improve FRC lobby conditions and to make it easier on households with uncertain circumstances.
- San Diego's CalFresh Program engaged Legal Aid Society of San Diego (LASSD) to provide technical assistance in reviewing its local policies and procedures. As of December 2012, LASSD has reviewed one hundred forty-one (141) sections in the existing CalFresh Program Guide of which:
 - 100 sections have been updated
 - 7 sections are pending a response for the California Department of Social

Services (CDSS).

- 34 sections were reported by LASSD did not require any changes at this time.

***Review of Family Resource Center facilities
(Recommendations 6 & 58)***

Below are some of the steps that have been taken at FRCs in 2012 to make them more welcoming and friendly.

- North Inland FRC
 - New floor for lobby
 - New Ambassador area
 - Lobby enhancement
- El Cajon FRC
 - Improved patio area
 - New ambassador area
 - Remodeled clerical area
- South Region FRC
 - Improved patio area
 - New ambassador area
 - Additional seating in client lobby area
- Southeast FRC
 - Remodeled clerical worker and administration area
- In December 2012, HHSA began a project to install an automated Lobby Management System in all large and medium Family Resource Center lobbies.

IV. IMPROVING THE CULTURE FROM WITHIN COUNTY GOVERNMENT

In order for staff to excel in serving customers, they must understand how the work they do in administering CalFresh benefits is vital to achieving the County vision of safe, healthy, thriving communities. SSAB's recommendations call for reinforcing the basic principles of good customer service when providing assistance to those applying for and receiving CalFresh benefits.

(Recommendations 3, 12, 36 & 54)

- In May of 2012, the Agency launched its *Live Well San Diego! Living Safely* staff training and outreach. This combination of staff champion's in-person and on-line training was implemented to generate discussion with all HHSAs employees on development of a plan to ensure all families and individuals are connected, protected and prepared.
- From March 2012 through September 2012, The Agency, in collaboration with various community partners, developed and trained 1,626 staff on the issue of poverty from an individual perspective. The training provided insight into how poverty affects the lives of the people we serve as well as knowledge to offer assistance with empathy and understanding.
- In addition to several cultural competency classes which address specific cultural characteristics of the various cultural groups served by HHSAs, several classes in 2012 were conducted for HHSAs staff to promote a service-oriented approach to delivering services. These include:
 - Customer Service Excellence which teaches new techniques to better serve our customers by determining the needs of the customer and analyzing the challenges that we face as an Agency.
 - The People Principle: What to Say and How To Say It. This course covers verbal and non-verbal communications, as well as listening skills which are vital communication tools for customer service success.
 - Conflict Resolution: Composure Under Fire. The training provides Supervisors and Managers with the tools they need to assist their staff in resolving conflicts with customers and in the work environment.
- The Agency will be launching a new online training in 2013, entitled *Our Aging Population and Poverty*. The Training explores poverty from the perspective of our seniors to assist with empathy in serving them better. It also serves as a reminder to staff of special deductions that may apply to seniors who are

receiving CalFresh benefits to increase the amount of benefits they receive.

***Developing a culture that values quality
(Recommendations 2, 8, 31, 44 & 53)***

- In November 2012, three Family Resource Centers initiated pilot projects for intake and continuing eligibility cases. The pilot is intended to create more flexibility in how staff is deployed to serve customers who are submitting documents to update or continue their service levels for the CalFresh, Medi-Cal and CalWORKs programs. It is anticipated that this process will reduce wait times and improve customer service by assigning new applications to a single worker.
- Eligibility Operations will continue its pursuit of assuring quality in order to provide superior customer service. It is an ongoing core function of the Eligibility Operations to drive consistent, high-performing eligibility services in all offices with an emphasis on customer service. In support of this effort, the County of San Diego and Service Employees International Union (SEIU) established an Eligibility Continuous Improvement Committee that provided input on ways to improve the task based eligibility system. The committee provided a forum for open dialogue between line staff and management regarding eligibility processes.

CONCLUSION

The Health and Human Services Agency (HHSA) is committed to continuously pursuing changes that improve administration of CalFresh and better meet the needs of residents applying for and participating in the program. As previously mentioned, the Agency has taken meaningful steps to pursue the goals and recommendations of the SSAB. HHSA is dedicated to preserving and fostering the relationships with our community partners to improve the CalFresh program throughout San Diego County. HHSA will continue to utilize SSAB's recommendations to advance superior customer service and ensure access to the CalFresh program.