

**COUNTY OF SAN DIEGO
HEALTH AND HUMAN SERVICES AGENCY
SOCIAL SERVICES ADVISORY BOARD**

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SSAB Meeting Minutes

June 14, 2012

<p><u>Members Present</u> Bob Brandenburg Philip Thalheimer Linda Blair Forth John Hughes Bruce Abrams Jennifer Tinsley Sandy Pugliese</p> <p><u>Members Absent</u> Don Stump Nancy Rorbaugh</p>	<p><u>Staff Present</u> Kim Forrester, HHSA Dale Fleming, Director SPOS Stephanie Gioia, BOS 4 Pat Lopez, HHSA Anabel Poole, HHSA Craig Sturak, HHSA</p> <p><u>Guests</u> Joni Halpern, Maria Aceves, Jolie Ramage, Jennifer Tracy, Marjorie Larson, Joyce Abrams, Ramona Berry, Lindsey Wade, Bill Oswald, Tony Roderick, Richele Swagler, Roxanne Hernandez, Ilene Davis, Mark Dillon, Hannah Gravette, Newt Ferris, Lindsey Wade, Derek Staats, Don Davis, Daniel Benson, Amanda Schultz, Mary Alcock, Ben Avey</p>
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1. Chairman Phil Thalheimer called the meeting to order at 9:38 a.m.
2. Bob Brandenburg motioned to approve the May 10, 2012 minutes. John Hughes seconded the motion. The minutes were approved unanimously.
3. **Public Comments on Items not listed on the Agenda:**
 - Joyce Abrams, member of the Human Relations Commission from the City of San Diego, said she inquired two months ago about when we can expect to hear radio advertisements on San Diego stations similar to the ads run in Los Angeles regarding access to the CalFresh program. Ms. Abrams would like an update on the Agency's progress.
 - Hannah Gravette, from San Diego Organizing Project - an organization representing 35 faith congregations throughout San Diego County serving 75,000 families, of which many are low income and utilize Agency programs - offered comments regarding agenda item #4 that concerns the County's plan to hire and train close to 200 new employees indicating they'd like to have input on how to hire and train these new staff. She said she'd like to discuss how the County can be supported by community-based agencies that currently work on enrollment to aid programs and are trusted and preferred by many members of the community. As of January 1, 2014, as many as 200,000 families will be eligible for Medi-Cal under the Affordable Health Care Act and the community-based agencies will be an important tool.
 - Jennifer Tracey, Interim Director of the San Diego Hunger Coalition, commended the Social Services Advisory Board (SSAB) and HHSA's efforts to improve the access for public benefits for eligible people. She said the Hunger Coalition is excited about the changes being made and the dedication with which these efforts are being taken. She shared ongoing concerns including difficulties in the process of accessing benefits and the frequency of misinformation given to clients, including the frequency of erroneous denials. She said the members of the Hunger Coalition feel the Agency's plan to increase staff into a system that is not working efficiently will only exacerbate existing problems. She requests the Agency bring in relevant partners to provide feedback on the changes being proposed and on the trainings being provided to staff. The Hunger Coalition also would like to see the Agency solicit the feedback of benefit recipients and low income clients in the eligibility process. The Hunger Coalition would like to see broader access to the proceedings of the SSAB meetings and suggested the minutes be posted on the County website.

- Ben Avey, of Family Health Centers of San Diego, stated the Family Health Centers program is the second largest federally qualified health center in the U.S. In 2011, the program took care of 165,000 unduplicated patients with a mission to provide high quality, caring, affordable healthcare, with a special commitment to those who are low income, uninsured and underserved. Mr. Avey suggested the County could benefit from closer alignment with organizations, such as Family Health Centers of San Diego, in efficiently enrolling clients eligible for healthcare services. He offered to work closely with the County and look at the metrics to improve FRC and ACCESS wait times and resolve inconsistencies and problems with CalWIN benefits and welcomes a discussion on how Family Health Centers of San Diego can work better with the County to make the benefit programs more efficient. He feels it is important to bring the Health & Human Services Advisory Board into this discussion due to the upcoming healthcare reform.
- Marjorie Larsen, representing SPIN, repeated the message that SPIN has been telling SSAB and the County for years, that business process re-engineering is not working and the changes that have been undertaken thus far can only fail because the system is broken in so many ways. She said the biggest problem in the way the system is designed is there is no oversight of what happens in an individual case. She said SPIN will continue to share examples of individual cases to illustrate how the system is failing the clients it serves.
- Maria Aceves, of SPIN, said SPIN representatives have visited FRC offices many times with parents and have heard workers tell these clients they do not qualify for benefits. She said if the SPIN representative did not go with the client, the case notes for this client would show no visit, no application for benefits, and no denial. She pointed out very few clients ask for a hearing and when a hearing is requested, there is no record of the client's encounter. Ms. Aceves thinks the system is unfair in that it allows information to remain hidden.
- Bill Oswald, representing Caring Council, said he believes the SSAB is not seeing a clear picture of what is going on with the performance of the Agency. He said he got the message last month that the board feels the changes being made will fix the Food Stamp and ACCESS issues, but he does not agree. He fears the board and the Agency are relying on numbers too heavily, and wants to remind the board that numbers are not without bias. He quoted an adage that says, "Numbers don't lie, people do." Mr. Oswald said a bias occurs in the data when one decides what to measure and what not to measure, what to report and what not to report, and where one focuses. He said two years ago the State auditor, when looking at fraud savings, almost said the County's data was made up. Mr. Oswald said the County's rate of pending applications is 56%, while the state average is 8% - 12% and yet, he has been frustrated for months trying to get a clear definition of how the Agency defines "pending". He is not satisfied that workers who make mistakes continue to make the same mistakes and the negative error rate is 20% -25%, leading to too many applicants being falsely denied.
- Joni Halpern, on behalf of SPIN, presented a handout and referenced a case discussed at the Agency/stakeholder meeting. She highlighted several problems with the eligibility process. She said people can wait in line at the FRCs for hours or even the whole day and yet, in many instances, the County file and case notes will not even reflect the client's visit. She said workers have violated regulations that have been in effect for many years and sometimes refuse to or fail to acquire necessary information that could easily be obtained. Ms. Halpern speculated improved wait times at the ACCESS Call Center may reflect the widespread understanding among clients that it is futile to utilize ACCESS and the only way to solve problems with an application is to make an FRC visit. It is her opinion the task-based system does not work as there is no-one in charge of case outcomes. She fears the problems with the delivery of benefits are going to become a community health problem in which clients will no longer be able to keep a roof over their heads or feed their children. Ms. Halpern said CalWIN spews denials and threats without worker input and trained advocates are even unable to assist clients. Even worse, in the end, the blame for the failures of the system is placed on the client.

- Lindsey Wade, representing the Hospital Association of San Diego & Imperial Counties (HASD&IC), which represents over 35 hospital and healthcare systems within San Diego and Imperial Counties, began by thanking Dale Fleming and the board for the help they have provided on issues dealing with FRCs, ACCESS and the Hospital Outpatient Services Program in which trained patient advocates in the hospital help patients access public benefits. Ms. Wade said the hospitals are one of 13 organizations who have submitted a letter outlining their concerns with enrollment problems, and specifically, with some of the recommendations in the InTelegy report. She mentioned the difficulty clients have accessing the eligibility system and the frequency of clients receiving misinformation from workers. She expressed concern that as the County hires additional workers outcomes may not improve unless the system is made more efficient and effective. She called for better partnerships with community stakeholders in developing new trainings that will lead to better results. Ms. Wade asked the Social Services Advisory Board to consider working closer with the Health Services Advisory Board on issues of eligibility as the public need for social services is closely tied to health and medical needs. She repeated the sentiment of earlier public comments that requested greater access to information, such as Tiger Team updates and SSAB meetings, in order to reach and interact with community agencies that may not be able to attend SSAB meetings. She asked the Agency, as it brings new eligibility workers on board, to consider specialized roles for staff who can work closely with liaisons at community based organizations to more efficiently enroll clients in these settings.

PRESENTATIONS/DISCUSSION ITEMS:

4. **Information Item:** Eligibility Operations Review Team Update: Anabel Poole, Special Projects Manager, Director's Office, Health & Human Services Agency (HHS): Before presenting a report on Eligibility Information Technology (IT), Craig Sturak, Administrative Analyst III, reported to the board the Eligibility Operations Review (EOR) Team participated in the quarterly CalFresh task force hosted by the San Diego Hunger Coalition where they discussed issues of customer service and other issues of concern. Yesterday the team hosted a focus group with concerned social services and healthcare providers in which they discussed the Interactive Voice Response (IVR) system. The dialogue led to useful recommendations for the ACCESS team. He announced the EOR team will be launching two new surveys next month, the results of which he plans to share at the next board meeting. The first will gauge line staff's assessment of the quality of the tools they work with. The second is a customer service survey aimed at learning the quality of the clients' experience including knowledge of staff, professionalism, courtesy, and environment. He then began a power point presentation entitled, "Eligibility IT: Focus on Connections". The IT projects fall into two broad categories. The first for projects designed to make it easier for customers to access services, allowing customers to take a more active role in communicating and receiving information. The second category includes behind the scenes links between systems that will reduce manual steps, create greater efficiency, and reduce errors in the eligibility process. Both categories address the goal of improving service to customers and helping our staff do their job better. Of the 16 notable projects actively being worked on, 10 are expected to be implemented this year. Not all of these projects are solely San Diego County projects. Some, in particular those associated with CalWIN, are dependant on work being done at the consortium or State levels. Mr. Sturak reminded the board these projects will face numerous contingencies and modifications before and during their roll-out. He highlighted the My Benefits/CalWIN Web Portal. Phase I of this multi-phased project is a web-based point of access that will allow clients to access their benefit information, upload/download documents, and allow clients to interact in many other ways with CalWIN. In later phases the My Benefits Portal is expected to serve as a platform to integrate document and application tracking for customers. Mr. Sturak then reported on the Client Visit Management tool (CVM), a customer flow management and queuing system, that will support a more orderly and smooth lobby experience for customers in Family Resource Centers (FRCs). Eventually, the CVM will include FRC office kiosks that will allow for automated check-in. He then reported on development of the CalWIN/CalFresh Application Tracking Tool. This tool will allow Community Based Organizations (CBO) in Benefits CalWIN to receive reports that, among other

things, will include outcomes of active cases. Mr. Sturak moved on to discuss some of the behind the scenes Eligibility IT projects. The Eligibility Task Management tool is a critical aspect of the task management system which will automate the process of assigning tasks to the appropriate FRC and to the right eligibility worker. The tool is user acceptance testing and will be piloted at the Lemon Grove FRC and the Mail Imaging Center. The Kofax Imaging System Enhancement project is a multi-phase project that will streamline document processing which currently requires time-consuming and cumbersome handling by staff. The CalWIN Web-Enablement project will modernize CalWIN making it a web-based platform which will feature enhanced navigation and more efficient integration with other web applications. He then took questions from the board. Rev. John Hughes inquired about the timelines for the implementation of the Eligibility IT projects. Mr. Sturak replied the projects summary handout included dates that reveal the planned project development date. Sandy Pugliese asked if clients will have the opportunity to leave a voicemail message when calling the ACCESS line. Mr. Sturak replied this is an option that has been discussed, but is not yet in development. Ms. Pugliese then asked if ACCESS could include an option for the client to leave their telephone number for a call back. Anabel Poole indicate that once increased staffing is in place, she hopes to pilot a call back system. She said it is likely this enhancement will not take place until after September when it is hoped the ACCESS Call Center will be relocated in a new building. Ms. Pugliese shared the experience of her sister who had to apply Medi-cal and food stamps. She encountered long wait times at FRCs and on the ACCESS line and experienced the frustration of receiving mistaken information and hearing that documents had been lost. Rev. John Hughes then asked about what is being done to reduce long wait times in the FRCs and at ACCESS. Dale Fleming responded that as the Agency makes systemic changes, they are taking precautions to avoid quick fixes that might lead to new problems elsewhere in the system. She said the addition of new trained staff and AT&T technology advisors on the floor at ACCESS, along with the additional trunk lines, is anticipated to reduce wait times. Anabel Poole pointed out the Agency has twice monthly meetings with labor to jointly develop options for customer service that could include same day intake and prearranged appointments at FRCs. These options will be vetted by labor and new ideas will be included in the customer survey. Mr. Hughes asked Mr. Sturak to comment specifically on the timeline of implementation of projects that will reduce wait times in the FRC lobby. Mr. Sturak responded that there is no single project that, by itself, can reduce wait times, but all these IT projects, when implemented, will jointly contribute to greater efficiency and reduced wait times. Bruce Abrams voiced a concern that some of these IT projects assume that low-income people have access to the Internet. He asked if there is a facility to which we can direct clients and how can we deal with this problem. Ms. Poole responded that, at next month's meeting in the SNAP Participation Grant Application presentation, the Agency will be addressing that issue. Linda Blair Forth inquired if there is data to show the ratio of worker to clients at each point of contact has been examined. Ms. Poole responded the Agency is currently using data to best meet frontline and backline staffing needs. Ms. Blair Forth asked if there are community-based options that can be used by clients to apply for benefits. Ms. Poole replied some clients can apply on the phone with 2-1-1 and some go through the hospitals and the clinics. Phil Thalheimer said though he is the Agency's strongest advocate, he fears government often reinvents solutions to technological problems that are already available from public sources. He said San Diego is a Mecca for IT technology and the Agency might benefit from reaching out to private industry and utilizing their proven expertise. He offered to share contacts. Ms. Poole said this is a point well taken. She said the CVM project is working with the system used at Department of Motor Vehicles and other places.

5. **Information Item:** Eligibility Stakeholders' Forum Update: Dale Fleming, Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHSA). Ms. Fleming reported the first Eligibility Stakeholders' Forum was well attended, there was a lot of participation, and stakeholders provided their input, observations, and recommendations. She said stakeholders expressed their concern the FRCs are not welcoming places, there continue to be long lines, there are questions about their physical locations, and they are not kid-friendly. Ms. Fleming said the Agency is aware of the need for systemic change, which is why the Eligibility

Operations Review is so important. Stakeholders emphasized the need to prepare now for the changes coming with healthcare reform. Community agencies expressed their interest in sharing in the development of effective trainings for new hires and stressed the need for clear and consistent rules and regulations in the eligibility process. A number of stakeholders spoke about the role of program integrity and fraud prevention and called for a culture change in the Agency in the context of public benefit programs. They called for a culture of inclusion, not exclusion. Stakeholders presented case examples at the forum. One case demonstrated the importance of developing greater communication between County departments. Case examples were used to illustrate the need to ensure staff and FRCs are well equipped and knowledgeable. Ms. Fleming said she is encouraged by the forum process and thinks it will give the Eligibility Operations Review team real-life examples to guide decision making in necessary changes to improve performance. Ms. Fleming and the forum participants agreed on their homework. She will email a list of topics discussed at the first forum to the stakeholders, and they will pull together case studies for review with a goal of examining case trends that illustrate what the customers experience should be and should not be. Mr. Thalheimer thanked Ms. Fleming and asked the board for any questions. Bob Brandenburg said he was pleased to hear what folks have to say in an unvarnished form as it is shared at the Eligibility Stakeholders Forum. He thinks it's good that technical and line staff were present because an important link has to be created between the raw data and what needs to be done in the system to alleviate problems. While recognizing the stakeholder's frustrations, he said this did not happen overnight and will not be fixed overnight. He expressed his confidence the Operations Research Team will put in place the correct measurements to gather reliable data leading to reliable fixes that will work the first time and permanently. Philip Thalheimer stated he agreed with Mr. Brandenburg and said this meeting is a good beginning. He said we need the information as clear as possible. John Hughes agreed having community input is essential and said he thought some good recommendations had been made. He particularly liked the stakeholder's call for including partner feedback and training input on the new hires. Mr. Hughes asked if there is public access to SSAB meeting information. Board members, Bob Brandenburg, Phil Thalheimer and Linda Blair Forth agreed staff should implement a policy of posting the agenda and board approved minutes on the Agency's web portal. Mr. Abrams requested the postings go back to the first of the year. Mr. Hughes said he would like the Agency to examine the idea of eligibility across the various citizen's advisory boards. He asked for a clear definition of the term "pending cases". Ms. Fleming said the County uses the State definition and she will provide that at the next SSAB meeting. Mr. Hughes stated he is concerned and disturbed about the tone and lack of professionalism by Agency workers in Joni Halpern's presentation. He hopes that some way can be found to bring feedback of the client's experience into trainings to help improve customer service.

- 6. Information Item:** Community Nutrition Expansion Project Update/SNAP Participation Grant Update: Dale Fleming, Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHSA). Ms. Fleming reported on the status of the State-funded Community Nutrition Expansion Project (CNEP) which is aimed at educating low income families who are likely to be eligible for CalFresh benefits on healthy food choices and preparation. Using an evidenced base approach, the County has initiated programs at Welfare to Work sites and is reaching out to the targeted population through community-based agencies, food banks, and qualifying schools. Most of the training is being provided by contracted providers. Using guidelines proscribed by the State grant, 218 participants have been trained directly on nutrition, and information has been distributed at community events to about 360 individuals. The goal is to reach 700. Some examples of local events at which information has been shared are the Tubman/Chavez Network and the Fruit & Veggie Fest. More activities are planned through September. The "Rethink Your Drink" campaign is aimed at encouraging changes in lifestyle that dovetail with *Live Well, San Diego!* and our Building Better Health initiative. In partnership with the Public Health Office, the Agency is using the project to work with communities on how to access healthy food in and near their neighborhoods. The Nutrition Security Task Force has created a Community Nutrition Action Plan group which works with public health and community based

agencies to further the grant's objectives. She said, later this summer, the project will be utilizing some of its funds to make media buys to post advertisements at bus shelters in portions of the region in which the CalFresh population is located. Phil Thalheimer asked if there were any questions. Sandy Pugliese inquired if media buys will include public service radio announcements for CalFresh. Ms. Fleming said the bus shelter ads that will run from July through September are funded through the CNEP Grant. She has taken under advisement the stakeholders' concern to promote the CalFresh program through radio advertising. She pointed out the Los Angeles radio ads are directed by and paid for by the US Department of Agriculture Food and Nutrition Service, and are federal ad buys. Ms. Fleming advised the board that next month the Agency anticipates providing the board with a detailed presentation of the upcoming SNAP Participation Grant application. She said the Agency consulted with community stakeholders and made the determination to put more access points in the community, in targeted locations, to assist people to get into the CalFresh system. The Agency is setting a goal to enroll 37,000 clients over the next three years.

7. **Action Item:** 2010-2013 Refugee Employment Services Plan Amendment: Richele Swagler, Refugee Coordinator, Strategic Planning & Operational Support, Health & Human Services Agency (HHS): Tabled.
8. **Information Item:** Agency Updates: Kim Forrester, Assistant Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHS): No updates to report.

ADJOURNMENT/SET NEXT MEETING:

The meeting was adjourned at 11:35 a.m.

The next regular meeting will be held on **July 12, 2012, Mills Building, 10th Floor MTS Conference Room, 1255 Imperial Avenue, San Diego, 9:30 a.m. to 11:30 a.m.**

The SSAB Minutes were written and submitted by Sandee Stewart.