

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

**1255 Imperial Avenue, San Diego, CA 92101**

**Phone (619) 338-2870**

**Fax (619) 338-2872**

**SSAB Meeting Minutes**

**July 12, 2012**

<p><b><u>Members Present</u></b> Bob Brandenburg Philip Thalheimer Bruce Abrams Sandy Pugliese Charles Borra</p> <p><b><u>Members Absent</u></b> Don Stump Nancy Rorbaugh Jennifer Tinsley Linda Blair Forth John Hughes</p>	<p><b><u>Staff Present</u></b> Kim Forrester, HHSA Dale Fleming, Director SPOS Stephanie Gioia, BOS 4 Pat Lopez, HHSA Anabel Poole, HHSA Craig Sturak, HHSA Adrienne Yancey, HHSA Aurora Kiviat, CAO Staff Officer</p> <p><b><u>Guests</u></b> Joni Halpern, Maria Aceves, Ilene Davis, Jolie Ramage, Jennifer Tracy, Marjorie Larson, Joyce Abrams, Parke Troutman, Jessica Roeckel, Claire Oksayan, Dan Meyer, Shaina Gross, Bill Oswald, , Lindsey Wade, Derek Staats, Daniel Benson, Amanda Schultz, Ben Avey, Caley Halpern, Shanelle Watkins, Paula Perry, Don Davis</p>
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1. Chairman Philip Thalheimer called the meeting to order at 9:38 a.m.
2. The June 14, 2012 minutes were not approved due to lack of a quorum. They will be set for approval at the next meeting on August 9, 2012. Philip Thalheimer introduced and welcomed new Board Member, Mr. Charles Borra.
3. **Public Comments on Items not listed on the Agenda:**
  - Dan Meyer, of the Caring Council, thanked the SSAB Board for their help in moving along the process of getting more people on to Food Stamps. He wants the Board to see that the 69 Recommendations approved by the County Supervisors are being acted on and implemented. He expressed that the application system still needs change. He indicated the InTelegy report repeated what the Caring Council has been recommending for three years. He asked the Board to please listen to SPIN members, Maria Aceves and Joni Halpern, as they work with people applying for Food Stamps. He indicated the lack of food for San Diego is very serious and that churches and religious communities are deluged with people that need food. It cries out to a moral and ethical response. He keeps his fellow clergy and Point Loma ministerial association updated on the Food Stamps issue and they don't understand why it takes so long to change the system. He stated the religious community wants to do more, but donations have diminished leading to other resources such as Food Stamps. The program has more people enrolled, but the number of those that are eligible that are not on Food Stamps is still at about 50 percent. He discussed that many people are afraid of applying for various reasons including fraud investigations. He feels that fraud investigations should be done away with.
  - Ilene Davis, of SPIN, provided a case example of a parent who rides the bus for one and a half hours to work minimum wage making a net income of approximately \$1300 per month, with no sick leave or benefits. This parent has a serious disease which allowed eligibility for monitoring and medication from the County HHSA Clinic. The parent's free medicine stopped and the parent did not understand why. She was not eligible to no share of cost Medi-Cal and could not accept the share of cost option due to her limited income. This parent has not taken medication in more than one year and it is unknown if the disease has recurred due to limitations in funding to see a doctor. Ms. Davis asked the County to help resolve this person's access to medical treatment. She stated that this example can be repeated by many others in San Diego County if the

processes that keep people healthy and well are not performing optimally. She discussed the importance of adequate nutrition and that Food Stamps are needed when income runs short. She indicated that self-sufficiency program systems are difficult to access and maintain - we cannot hope to maintain community health one case at a time. She stressed that the whole system needs to work, and needs to work now.

- Caley Halpern, a ninth grade high school student, indicated as a student even under the best circumstances, it is easy to get distracted or feel as though you are not doing as well as you could. She said that her goals are no different from many others at her school, but for those that go to school hungry those goals are harder to reach. There are students that do not have enough food at home and instead of coming to school ready to work, they are unable to concentrate. She stated that these students may be filled with worry or sorrow because they don't know when they will have their next decent meal. Students are taught the importance of getting enough protein, fiber, vitamins and minerals. If one doesn't have enough good or the right foods, it could harm their brain, especially during a period of growth. She expressed that the students that have to worry about this are anxious, unable to focus, could have depression and negative thoughts or actions as well as feelings of embarrassment. She stated that she's counting on the Board to make sure this problem is solved so that all kids in San Diego County have a fair chance to achieve their dreams.
- Shanelle Watkins, speaking on behalf of herself, is a senior at California State University San Marcos. She recently applied for Food Stamps because she had been laid off from her job, was seven months pregnant and just about to finish her undergraduate education. She now knows what people are talking about when they say they have experienced humiliation or shame with Family Resource Centers or welfare offices. She was one day late in submitting her paperwork due to her former employer not being able to obtain the HR information within the deadline set. The worker said that she would need to wait an additional 10 days to receive Food Stamps. Up to this point, she had received emergency Food Stamps. She expressed her need for aid and said that the worker was unkind. When she asked if there was any way for her to get food, she stated that the worker provided her with food pantries and other resources, as well as telling her she can get free or reduced lunch, without letting her know where. When she left she felt as if she was a failure and looked at negatively. This fall, she will be completing her undergraduate education in Social Welfare Policies and Services. She claimed that now she has first-hand knowledge of how these systems work when people need aid the most.
- Paula Perry, of SPIN, shared her personal experience in applying for Food Stamps. She claimed that she is one of many that tell of the tragedy of going hungry rather than applying for Food Stamps. She applied for and was denied Food Stamps while receiving unemployment. She later applied with the same income and was approved. Due to a County error, her Food Stamps were overissued and she could not pay it back at the time. When she became self-employed, her Food Stamps were reduced to almost nothing. She wrote to stop receiving benefits, yet new benefits kept coming. She did not use the Food Stamps because she did not think they should be on her card. Seven months later, she received a letter saying that her Food Stamps were being terminated. She now goes to the Food Banks because she is afraid to apply for Food Stamps, and afraid to get an overissuance that becomes a debt too hard to pay. She stated that she is one of many stories in San Diego County that goes hungry because she cannot go through the stress of overissuance. For many, overissuances, if not paid, will intercept tax refunds and families don't receive the money they were counting on to live. She then addressed the importance of the County providing nutritional education. A grant was received by a County library near her home to provide a Healthy Living class, which she regularly participates in. The group provides tools to help keep track of activities and food intake. Items are also raffled off to promote healthy cooking and exercise. She mentioned that the tone is inclusive and friendly. A certificate is received for participating. She has encouraged others in the community to enroll in this class if it is offered again.
- Marjorie Larson, of SPIN, provided a case example to illustrate a recurring problem with overpayments of CalWORKs and overissuances of Food Stamps that are not removed from the collection accounts of Revenue and Recovery. The parent went to an FRC on June 12, 2012 to

apply for Food Stamp benefits. She was told that she had an overissuance from 2009 of \$1735. As a result of an appeal, the overissuance was reduced to \$651 as indicated in a Notice of Action dated May 17, 2010. In that same month, SPIN sent a letter to the Office of Revenue and Recovery to show records of this reduction. The records were not corrected. It is now three years past the date of the error and more than two years past the appeals resolution and the records have not been changed. To date, the parent has not received Food Stamps even though her case was approved. More than a month has passed and her EBT card is still empty. This will not show up as a violation in timely processing. Ms. Larson stated that this is not an isolated case and there are many like it. She asked the SSAB to ask the County to inform them and advocates of the process by which overpayments and overissuances are revised or removed from the collection accounts of Revenue and Recovery.

- Maria Aceves, of SPIN, stated that approximately two weeks ago, she participated in a conference call that was intended only for advocates. The call was for advocates to talk to a representative from Food and Nutrition Services (FNS) to discuss issues and concerns with Food Stamp access. She stated that all participants said their names on the call, but someone did not and believed that was a County representative. When she attended the Nutrition Security Task Force meeting, a member discussed issues that were raised on the advocate's call. She stated that the advocates do not have secrets that they share only with FNS. They share with the FNS what they share with the County. She feels that it is disrespectful for the County to participate in silence. In her opinion, the person participated in the call to protect the County rather than hear the voice of the community. She suggested that if the County wants to become advocates for the community that they stand in lines, sit for hours at FRCs, wait on phone lines and welcome their clients' children home from school with no food to give them.
- Joni Halpern, of SPIN, provided a summary of a PowerPoint entitled Typical BPR Errors for reference. She stated that during the SNAP workgroup she said that for a BPR to work without any assigned case worker oversight, it would require that every person needs to keep perfect case notes logged in on the day the contact or action occurs, every person that touches the case has to apply the rules properly and apply the practices without error, and every person asked to respond to a problem in the case has to review case notes and documents until they find the seminal error, even if it takes longer than the few minutes presently allowed. She stated that case notes are incomplete, not entered timely, or not entered at all. She thanked Dale Fleming for allowing advocates to bring specific examples and to discuss issues openly at the Eligibility Stakeholder's Forum. The answers will be helpful for advocates to understand. Ms. Halpern discussed the case included in the PowerPoint summary provided that involved a man that was not related to the children, but living in the same household. The client was confused about the worker's instruction. Ms. Halpern explained that this is more than likely to be repeated because case workers are relying on previous case notes. She mentioned that Task-Based groups operate as islands and often there is nothing someone can do about this until the client calls in with a problem. She expressed concern with the CalWIN software system generating notices regarding issues that are not true problems. She referred to the case she presented and discussed an overpayment of nearly \$8000 that is now owed by the family. The client's transitional Food Stamps stop in August, and this overpayment, generated by systematic failure will now be repaid out of the food budget. In closing, Ms. Halpern stated that it would be a mistake to think that time and data alone will fix the system. She encouraged human relationships between workers and clients, as the workers must have some idea of the client, case history and the shared responsibility in the clients' forward progress. She stated that we can brag about the money saved in cutting staff and pretending that human services can be provided in an assembly line fashion, but the millions of dollars wasted in overissuances, overpayments, loss of human capital, and abandonment of worker satisfaction in a helping occupation, dwarfs the short-term savings and threatens community health and well being.

Mr. Brandenburg thanked Ms. Halpern and commented that it is not clear to him how the overpayments occur, why they occur and how they are being detected. Mr. Brandenburg discussed the issue on case comments that can be considered a deck log, an official record that

details everything that happens. If the case workers are not meticulous in entering case notes for a continuous thread, then it is unreasonable for another worker to understand the case. He stated that Ms. Halpern has a good point that if there is one worker handling case from start to finish, that person would know what the notes mean. Since this is not the case, it is vital to have the case notes be complete, detailed and accurate to reflect all circumstances of the case. He expressed concern that clients are receiving and spending benefits in good faith assuming they are the correct amount and then later discover that the County made an “oops” and the client has to repay. Ms. Fleming said that HHSA will bring a report back on both topics.

- Lindsey Wade, representing the Hospital Association of San Diego & Imperial Counties (HASD&IC), thanked the SSAB, Dale Fleming and Kim Forrester and their teams along with everyone that has been working to be so responsive to the concerns brought forward. She reviewed the minutes from the previous month and felt as though they captured what the speakers were trying to say as well as helped the members that were not in attendance for the meeting. She expressed that it is difficult to give a comment when she is not aware of activities and changes that have taken place. She was thankful that the SSAB website, a recommendation from last month, was implemented. She is hopeful that cross discussions can happen with other advisory boards, in particular the Health Services Advisory Board and she looks forward to future updates.

Mr. Brandenburg wanted to follow up to his earlier comments and stated that Ms. Pugliese made an important suggestion that if the County overissues benefits to a client, the responsibility of repayment should be the Agency’s budget - not the clients. Ms. Fleming said that she will research that and include that in the report. Mr. Brandenburg said that he can predict that the regulations governing this say something to the effect that if the client misrepresents their eligibility, they will owe the money. Mr. Brandenburg and other board members suggest that the County should pay for the mistake if it is their error.

- Bill Oswald, representing Caring Council, wanted to follow-up on an item that puzzles him. He provided a small handout with numbers that compare the State, Los Angeles County and San Diego County. San Diego’s numbers of compliance rate and ratio received to disposed were very close to those of the other two, however San Diego has a much higher pending rate. The State has a pending rate of 39%, Los Angeles- 22% and San Diego-58% and has been over 50% since 2009. He wonders what this means for the numbers? He addressed that the OR team has been set up, but what is the use if they are not getting good numbers? His concern is if there isn’t decent data, what is the impact of not entering information?

Mr. Brandenburg said that he appreciates Mr. Oswald’s concerns. Mr. Brandenburg stated that those on the OR team will be people with graduate degrees, trained research analysts. These people will get accurate data because they will do the measuring and get accurate data for us to know the real numbers. Since this is the second month in a row that pending applications has come up, he would like to request a monthly summary report of all pending cases including length of time pending, reasons pending, and what actions are being taken to resolve. Ms. Fleming stated that she can commit to following up with the Agency’s data experts to determine how that information can be extracted and begin with extracting information we have readily available.

- Joyce Abrams, member of the Human Relations Commission from the City of San Diego, stated that it is incredible to see the same concerned people come each month and offer their testimony. She hopes they are being listened to. She expressed concern that accessibility and accountability are not at the level they should be. She suggested a pending case spreadsheet that may provide some answers. She’d like to see Eligibility Operations Tiger Team Overview progress in chart form on a month to month basis. She suggested that SSAB members go to an eligibility office and spend a day watching without badges. Mr. Thalheimer stated that a number of the Board members have done that and do not have badges.
- Don Davis, representing himself and his church, stated that in the year 2000 his church started an organization to help single parents with their rent or deposit money. To date they have helped 380 families and he still gets weekly calls although he is no longer in that position. In many cases the people need as little as \$500. The church checks the income and aid they are receiving. He said that the previous week Dale Fleming had helped him greatly in a case where a mother had

abandoned her children and left them with the father. With Ms. Fleming's assistance, Foster Care was able to make the father a foster parent to the woman's children and prevent the children from entering the foster care system. He then discussed other cases of persons including seniors that are in need of small amounts of money to help them get by. He asked if there was a way the County could collect important information about where people can get help.

Ms. Fleming stated that the best resource is 2-1-1 San Diego, which has a very rich database of available services and resources.

Mr. Thalheimer stated that he too has given 2-1-1's information to other people.

Prior to public comment closing, Mr. Thalheimer wanted to reiterate what Mr. Brandenburg said about overpayments and asked that the County do whatever it can to resolve it.

**PRESENTATIONS/DISCUSSION ITEMS:**

- 4. Information Item:** Eligibility Operations Review Team Update: Craig Sturak, Administrative Analyst III, briefly discussed and shared the Social Services Advisory Board (SSAB) webpage that can be accessed through the County of San Diego website. The website will include agendas, past presentations and documents presented at SSAB meetings. One can request to be notified by email when items have been added to the website. The website link is included in the Eligibility Operations Review Tiger Team Overview handout. The handout also includes updates on the progress of the Eligibility Operations Review team. Mr. Sturak introduced Aurora Kiviat, CAO Staff Officer, Health and Human Services Agency, to provide an overview of the SNAP Participation Grant application mentioned in June 2012. Ms. Kiviat indicated that she is the lead on the grants arm of the Eligibility Tiger Team. She provided background on the grant stating that in 2008 the USDA Food Nutrition Services (FNS) authorized FNS to award \$5 million in grants per year to help support efforts by state agencies and their local and community partners to increase participation in the SNAP program. Last year the County applied for this grant and was successful in receiving funding. While it is rare for a particular jurisdiction to get this grant in consecutive years, the team thought that by proposing something that would augment and build upon existing efforts with last year's grants, San Diego had a fair shot of getting funded. Ms. Kiviat provided an overview of this year's funding priorities which include workflow analysis, process management, and technology improvements. A County cannot ask for funding for an ongoing project. Many process improvements are underway with the Eligibility Tiger Teams and not eligible for funding. To determine a proposal community partners, staff in Program areas, and staff in FRCs were asked what would be best to increase participation in our region and the 69 Recommendations were considered. Given the FNS criteria and funding priorities, the group determined the one that would have the best chance of getting funded. They found that those that are potentially eligible may not be participating due to awareness, not wish to apply due to stigmas or have barriers to their participation (inconvenient, lack of transportation, no internet, etc.) They found that many are lost during the step of providing/uploading their documents. Given this information, the team determined that it would be useful to have more self-service options. Ms. Kiviat shared a screen shot of the BenefitsCalWIN, the issue here is that people may not have access to a computer, a computer with internet or a scanner to upload documents, leading to loss of potential participants. To address this barrier, the County's proposal is to create 120 new online access points in the community. This includes: 60 portable self-service stations (computers, wireless access and scanners), 60 sets of technology (ultra portable laptops and portable scanners). These options are intended to be efficient and low cost. Training will be held for community partners and for tool usage. Ms. Kiviat stated the team thought it would be good to have a focused media plan for potential participants to use the system. Due to federal targeting, the plan focuses on zip codes of high poverty and may expand across the County. She responded to questions indicating it is a 3-year grant and we are looking at sustainability. This will be a pilot and they will look at the numbers to determine the efficacy. Mr. Brandenburg stated that he'd assume the efficacy would be clear very soon and there may be a cost benefit to the County to take on the costs post grant. Mr. Thalheimer said assuming that the grant is not received; he would guess there are several

organizations in the county that would be willing to pick something like this up due to low cost and it's what San Diego is known for. He thinks this is a great idea. Ms. Kiviat said that the County expects to hear the outcome of funding around September.

5. **Information Item:** Eligibility Stakeholders' Forum Update: Dale Fleming, Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHS). Before providing a brief update on the Eligibility Stakeholders' meeting Ms. Fleming addressed the concern regarding a County employee attending a call with advocates. She researched and was unable to find anyone in the County that was on the call. However, the federal government representative, Hope Rios did share with the County on that following Monday morning what was discussed on the call with the advocates as a means to notify the County what the community is saying. She reassured the advocates that the County sees them as partners and there is no want or need to spy because at monthly meetings advocates eloquently and freely share opinions and case details that HHS can follow up on and track trends. Ms. Fleming indicated that stakeholders had given topics in advance for discussion during the Eligibility Stakeholders' Forum. She was able to harness the experts in the room and had a very good conversation. Items covered were, the County process for document imaging, scanning and retrieval of those documents, auditing processes that the County has in place for the imaging and scanning processes, to make sure that we are checking and have not lost or miss-filed any documents; technical experts and a representative from a Family Resource Center discussed how it works and how they follow-up and follow-through with clients. She feels the discussion was very rich on that topic. Case note entries were discussed and experiences and real examples were shared by the community. The County agreed to re-examine what instructions are for case notes and case comments and to re-issue to underscore the importance. Another topic was determining if there is opportunity to create resources for professional assistance since we are working hand-in-hand with many community advocates who may have an eligibility technical question and they feel that it isn't appropriate to wait on the ACCESS call line. This topic is going to be reported back to the FRC Managers to see what the best way to connect would be and to get the feedback loop closed. In addition to the best way, to have consistent points of contact. She feels it was a very rich 45 minutes, and she was thankful for the County staff and community that attended and fought traffic to get there. Mr. Thalheimer wanted to compliment Ms. Fleming on coming up with the idea to have the Eligibility Stakeholders' Forum.
6. **Information Item:** Agency Updates: Kim Forrester, Assistant Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHS): Ms. Forrester indicated that there are items in the Governor's budget that will impact the CalWORKs program. The County is awaiting specific instructions from the State. The major changes include restoring the focus of the CalWORKs program on getting people back to work. The way in which the state is proposing to do this is by setting a 24 month CalWORKs limitation. Currently, CalWORKs recipients have 48 months of eligibility. The new program would start with a fresh 24 months and there would be certain circumstances which permit an additional 24 months. Another change is that there are going to be some cuts to the CalFresh budget though specific amounts are unknown. San Diego County is looking at impacts of these changes, but cannot fully analyze until details have been received. She added that the County cannot implement until instructions from the State are received. She then provided the following personnel updates: Jennifer Bransford-Koons has been selected as Assistant Deputy Director for the North Regions; A recruitment is open for a Deputy Director of Eligibility Operations; She is changing positions and will be working for Marie Brown-Mercadel in East Region.

**ADJOURNMENT/SET NEXT MEETING:**

The meeting was adjourned at 10:55 a.m.

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

[Redacted]

*The SSAB Minutes were written and submitted by Jessica Francis.*