

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

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SSAB Meeting Minutes

August 9, 2012

Members Present

Bob Brandenburg
Philip Thalheimer
Linda Blair Forth
Bruce Abrams

Members Absent

Don Stump
Nancy Rorabaugh
John Hughes
Sandy Pugliese
Charles Borra

Staff Present

Dale Fleming, Director SPOS
Stephanie Gioia, BOS District 4
Pat Lopez, HHSA
Anabel Poole, HHSA
Craig Sturak, HHSA
Kim Forrester, HHSA
Marie Brown-Mercadel, HHSA
Mark Silvia, HHSA
Marco Delatoba, HHSA
Maggie Ramsberger, HHSA
Laura Hernandez, HHSA
Terra Wallace, HHSA
Roxanne Hernandez, HHSA
Adrienne Yancey, HHSA
Orlando Arguello, HHSA
Rudolfo Pallares, HHSA

Guests

Paula Perry, Claire Oksayan, Derek Staats,
Joyce Abrams, Newt Ferris, Rev. Jim Grant, Jennifer Seneor,
Amanda Schultz, Traci DePurgatorio, Jennifer Tracy, Joni Halpern,
Maria Aceves, Ilene Davis, Melissa DuBois, Shaina Gross,
Daniel Benson, LASSD

1. Chairman Phil Thalheimer called the meeting to order at 9:37 a.m.
2. Bob Brandenburg motioned to approve the June and July 2012 minutes. Bruce Abrams seconded the motion. The minutes were approved unanimously.
3. **Public Comments on Items not listed on the Agenda:**
 - Amanda Schultz, CalFresh Outreach Manager with the San Diego Hunger Coalition, said she works to support nonprofit and community partners that help clients enroll and maintain CalFresh benefits. She informed the board she has been observing an increase in internal inconsistencies that have resulted in conflicting case information which has led to cases being denied or erroneously classified as pending. She referenced one specific case in which the client was told the case was pending, but the case comments showed a supervisor granted benefits. The client was still not receiving benefits. She drew attention to a second issue in which clients were denied or pending because they had not filled out and returned the voter's registration card that was supplied to them upon applying for benefits. When the Hunger Coalition inquired about the matter, they were told this was not possible because the benefits CalWIN program that produces the Notice of Action (NOA) does not have a field for the eligibility worker to populate regarding voter registration status. This indicates this information had to come from the case notes and was used to make a determination that is contrary to the program guidelines. Ms. Schultz told the board she appreciates the Agency's efforts to tackle these important issues, but she feels there are larger systemic issues which need to be addressed.

- Jennifer Seneor, CalFresh Outreach Manager with Feeding America San Diego, distributed a timeline printout of a specific case. These notes demonstrate required documents were submitted for required verifications multiple times to more than one worker, but repeatedly resulted in NOAs stating the case was pending because these same documents had not been submitted. She said when the Family Resource Center (FRC) was contacted, workers requested missing documents that were not included in the NOA requests. Ms. Seneor said with so many workers involved in the case and so many different requests for information, the process is confusing for trained community partner professionals and must be even more confusing for clients. She called for more support from the Agency for community based outreach programs and greater consistency in the use of case notes when making eligibility determinations.
- Jennifer Tracy, Director of the San Diego Hunger Coalition, told the board the examples provided by previous speakers represent the experience of many of the community partners who work with clients to ensure that eligible hungry families can access food benefits. She said the lack of consistency in case notes regarding client interactions undermine the ability of workers and partner agencies to effectively assist clients. She requested that all interactions with clients or client representatives be documented and reviewed by staff when making case decisions or sharing information.
- Rev. Jim Grant, from First Unitarian Universalist Church, addressed the board concerning moral issues as they relate to the CalFresh Program. He gave examples of what he characterized as inhumane treatment of clients who, he said, are some of the most needy people in our communities. He cited long waits on hold on the ACCESS call center line, lost documents requiring additional trips to the FRCs, and San Diego's higher rate of pending cases relative to other California counties. He expressed concern that even as individual case problems are resolved, the underlying cause of the problems remains unresolved. Rev. Grant also asked what the Agency is doing to prepare for the January 2013 implementation of the Affordable Health Care Act.
- Maria Aceves, representing SPIN, reminded the board the first nutrition security plan passed by the board in 2009 has not accomplished everything it was created to address. She noted the County's new nutrition plan places a great emphasis on nutrition education. She said she does not understand how nutrition education is going to provide more healthy food to low income families. She said low income parents want to buy more fruits and vegetables, but are unable to make the vouchers stretch to afford fresh produce all month long. She called on the board and the County to tell Congress it is not a good time to reduce SNAP benefits.
- Ilene Davis, on behalf of immigrant families at SPIN, addressed the board concerning the problems that victims of domestic violence face when applying for public assistance or CalFresh benefits under the Violence Against Women Act or when they petition to adjust their immigration status under a "U Visa". She said eligibility workers are also confused about cases involving immigrants who are "qualified aliens" under the welfare reform law, but whose eligibility depends on a variety of exceptions. She asked the Agency to consider training a core of workers on all aspects of immigrant eligibility. They could then advise all eligibility workers on issues of immigrant eligibility.
- Paula Perry, representing SPIN, spoke for herself and on behalf of many SPIN families who are struggling to put food on the table. She said she would like to make her voice, and the voices of others like her, heard in the discussions HHSA is having leading to the County nutrition plan. She said many low income families who are forced to rely on food banks and food pantries face problems when relying on these sources for food. In her neighborhood, it is an hour and a half walk to go to the food bank that once a month offers the largest number of items. If she relies on the bus, she has found if the bus is just 5 minutes late, the food pantry refuses to provide food. The selection of food she receives is appreciated, but she finds that by mid-month she no longer has condiments, oil, meat, or fresh produce. Even with the nutrition class she is taking at the County library, she says it is virtually impossible to create a nutritionally balanced and edible meal with what is left. She asked the board to encourage the HHSA to provide some incentives in its County plan in order to get food banks and

pantries to provide more basic condiments, powdered milk and vegetable oil. She would also like to see food banks allow a limited grace period for people who arrive less than 15 minutes late, so they can still receive food when there is additional food available. Finally, she asked the SSAB to encourage HHSA to ask Feeding America and the food bank to develop recipes that incorporate the kinds of food distributed in their food baskets and try to build their food baskets around those recipes.

- Joni Halpern, on behalf of SPIN, stated that she took part in a dialogue with Dale Fleming, Adrienne Yancey and HHSA concerning the length of homeless recertification periods. She explained to the board that this was a wonderful experience. She appreciated the opportunity to be consulted before policy takes effect and was able to interview clients who will be affected in order to involve them in the process. She commented that, as a result of the Agency's efforts to involve community partners to a greater extent in development of new policy, advocates will now have a burden to do better at collaborating. She went on to alert the board to her observation that more families are struggling for food and shelter at a time when the infrastructure for public benefits is being stripped of money, staff and resources. She said it is imperative for all of us to get involved in advocacy. She called on the SSAB to weigh in on policy decisions made at higher levels that are failing us and creating an environment in which our community health is at risk.
- Joyce Abrams, representing the HR Commission with the City of San Diego, called the board's attention to the fact that September is "Hunger Action Month". She distributed a handout asking everyone to take the "CalFresh challenge". Participants are asked to eat for one week on a CalFresh budget, which is approximately \$34.31 per person per week. It is hoped that participants will reflect on the time involved and the nutrition challenges people face when they are on a limited budget. Ms. Abrams said, when looking at the County SSAB website, she observed many of the current SSAB Board members will be retiring the beginning of 2013. She hopes that the current members will use their influence to urge potential new commissioners who might be considering joining the board, to commit to attend the monthly SSAB meeting as its work is so important.

PRESENTATIONS/DISCUSSION ITEMS:

4. **Information Item:** Eligibility Operations Review Team Update: Anabel Poole, Special Projects Manager, Director's Office, Health & Human Services Agency (HHSA). In response to a request made by board members at the July meeting, Ms. Poole presented a handout illustrating the Agency's performance with regard to timely processing of eligibility applications for CalWORKs, CalFresh, and Medi-Cal. She reminded the board that the State defines timely processing as 30 days for CalFresh applications and 45 days for CalWORKs and Medi-Cal applications. She said the subgroup of Medi-Cal applications referred to as DDSD, which includes applicants between the ages of 21 and 64 that do not automatically qualify for Medi-Cal, and therefore, require a disability evaluation from the State can have a more than 45-day window for timely processing. Board member Bob Brandenburg said the board was seeking the reasons why pending applications that are delayed were in delayed status. Ms. Poole responded by saying that the computer system currently does not capture that information and the County is looking into how to gather that data. She said the Agency will be providing a handout on timely processing at future SSAB meetings and it is hoped in addition to data on the three major programs, the data for the Low Income Health Program, the County Medical Services Program and the General Relief Program will be included by next month. Ms. Poole then announced the Mail Scanning Center is changing its name to the Data Processing Center (DPC) to better reflect its role in supporting eligibility. ACCESS planners are working with AT&T, one of the Agency's technology providers, to incorporate a provider line, make changes to the Interactive Voice Response script, and develop a workforce management tool. She called the board's attention to the data showing the improved wait times for calls to ACCESS from 37:39 minutes in July 2011 to 23:59 minutes in July 2012. Additionally, she noted significantly more calls to ACCESS are answered and less calls have been abandoned over the last year. She reported 18 newly trained Human Services Specialists will report to ACCESS and 39 will report to Family Resource Centers (FRCs) and Fraud & Integrity

(F&I) in the month of August. In response to requests by community partners to develop a dedicated line for providers to reach ACCESS to expedite eligibility applications, the Agency hopes to have this service available in the next few months. She told the board next month the Agency will share results of client customer surveys conducted at FRCs, as well as surveys of line staff. At this time, she introduced Charley Khoury who is one of the three chairs for the FRCs and the co-lead for the Operations Tiger Team to present FRC changes to improve client service. She highlighted facility improvements at the North Inland, South Region, Southeast and El Cajon FRCs. Ms. Khoury announced a new desk aid currently in the development stages designed to provide guidance that will lead to improve service for special populations including immigrant households, options for translation services, types of eligibility verifications required, alternatives for typical verifications and what eligibility workers are required to do to assist applicants in getting verifications. She said the program to utilize web cameras located at the FRCs and community based organizations to reach customers unable to come into an FRC is up and running at the North Coastal, South Region and North Inland FRCs and will soon be in place at the El Cajon and Northeast FRCs. Customer Service Specialists (CSS) are designated persons at every FRC to track, monitor and resolve customer complaints/concerns. The CSS reports to the Assistant Deputy Director and data collected is now compiled to determine trends, training needs and performance expectations. Ms. Khoury announced a pilot project for new applications at the El Cajon and Centre City FRCs utilizing a caseload basis to improve the quality of service, including reducing the length of wait time at FRCs and the number of trips by clients to the FRCs. New applicants will receive a pre-appointment screening to quickly assess their needs and eligibility, and their case will remain with a specific identified worker up through case granting. The FRC will schedule interview appointments on the same day or up to five business days from the application date, and new applicants will have a designated phone line to the FRC while their application is pending approval. It is anticipated that this approach to processing new applications will result in a stronger relationship between worker and customer, reduced handoffs increasing efficiency, reduction in SharePoint to FRCs from ACCESS, and reduced impact on overflow intakes to other task groups. Better management of the application process will lead to increased worker satisfaction. Customers will be better prepared for appointments and the wait time to speak with workers should be reduced. The pilot project is planned for 90 days with a possible extension of an additional 90 days. At that time, the project will be evaluated for customer satisfaction, the number of applications received and timeliness in processing. Additionally, SharePoint data will indicate if the caseload based model will reduce the number of calls to ACCESS and improve efficiency as workers will resolve issues as they arise, reducing referrals. Board chairman Philip Thalheimer said he was pleased these changes are addressing many of the concerns that have been voiced at past board meetings over the last couple of years. With regard to facility improvements, Ms. Linda Blair Forth asked for clarification regarding the new Ambassador areas at the FRCs. Ms. Khoury explained these FRCs have an office assistant or eligibility worker readily available in the lobby that can direct and assist clients in a timely and efficient manner.

5. **Information Item:** Eligibility Stakeholders' Forum Update: Dale Fleming, Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHSA). Ms. Fleming reported community stakeholders voiced concerns regarding the need for consistent messaging across programs. When staff can quickly access the information they need and can readily access appropriate available desk aids, they will be able to make quicker and more accurate application decisions. Community partners suggested the Agency make use of line workers trained as subject matter experts on complex topics such as immigration eligibility, domestic violence eligibility and student eligibility. It was also suggested the Agency should examine the most common errors made and appeals that are in a position to be overturned and take that information to determine areas we need more subject matter experts and resources. Stakeholders spoke about the need to incorporate a "search" feature to the online program guide. Ms. Fleming was able to assure them this function is currently being developed by the IT team. Agency staff and stakeholders discussed the ongoing training line workers receive to ensure they are effective and successful, and have access to the most current guidelines and resources. Ms.

Fleming said it was mentioned the Agency should develop a training for integrity purposes for line workers to distinguish between good customer service and coaching clients for eligibility. She said the Agency and community partners both recognize that as the issues involved in public assistance become increasingly complex, the need for additional training becomes more critical. Ms. Fleming said she was encouraged to hear Joni Halpern offered to train community based advocates regarding eligibility processing.

6. **Information Item:** Overpayments and Over-issuances: Laura Hernandez, CalWORKs Program Manager, Strategic Planning & Operational Support, Health & Human Services Agency (HHSA). Ms. Hernandez provided a handout and began her presentation by defining Medi-Cal overpayments as the beneficiary parent or responsible relatives' failure to report required information in a timely manner. When these types of client errors occur, the beneficiary is liable for the overpayment. The California Department of Health Care Services determines an overpayment has been made when a potential overpayment equals or exceeds \$100.00 and the total Medi-Cal healthcare usage is over \$100.00, or when the beneficiary is found to be enrolled in a managed care plan or has other health care coverage. Referrals are not made for amounts less than \$100.00 or if the error is due to an administrative/County error, or when a change is reported within 10 days of an occurrence, but a 10-day notice was not sent by the County. Ms. Hernandez then defined CalWORKs overpayments. She said an overpayment occurs when a household receives more CalWORKs benefits than it is entitled to receive. The adult recipient(s) is liable for the overpayment. The three types of CalWORKs overpayments are administrative error, client-caused error and intentional program violation. State and federal laws and regulations require all CalWORKs overpayments be collected except under four circumstances: if an administrative error is less than \$35.00, if the overpayment is discharged by a court order, if a liable person in a closed case cannot be located or if the liable person in a closed case is deceased, the county cannot seek to collect from their estate. When a CalWORKs overpayment has been made, the Agency must notify the household of the reason or type of overpayment, the correct grant amount for each month of overpayment, the total amount of overpayment owed, and how much will be taken out of each month's cash aid to collect the overpayment. When an administrative error occurs, the County will collect overpayments at the rate of 5% of the maximum grant amount of the family per month until the benefits overpayment has been collected. For client-caused errors, the rate is 10% per month. A CalFresh over-issuance occurs when a household receives more CalFresh benefits than it is entitled to. All adult members of the household when the over-issuance occurred are held liable. Over-issuances can be due to administrative error, inadvertent household error or intentional program violation. Federal and state regulations require that all over-issuances be repaid except when an administrative error over-issuance is \$35.00 or less, or three years have passed. After the household has been notified as to the reason and amount of the over-issuance, they are given three different options to choose how to repay the over-issuance. If a household chooses to repay the over-issuance by benefit reduction, the monthly collection rate is greater for inadvertent household error than administrative error and greater still for intentional program violation. When a case is discontinued, the County Office of Revenue and Recovery (ORR) continues collection activities and will negotiate a payment schedule. The ORR has several means to collect overpayments/over-issuances when the liable person(s) fails to respond to collection notices. If a CalWORKs/CalFresh case is reopened, the ORR closes their collection account and the Agency continues the overpayment collection. Intentional program violation overpayments/over-issuances are only collected if the violation has been determined by a court of law, determined by an administrative disqualification hearing or if it is established by a signed disqualification consent agreement. Board member Bob Brandenburg asked if clients are made aware of the fact they are liable for overpayments or over-issuances due to County administrative error when first applying for benefits. Anabel Poole replied changes to the rule would need to be made at the state/federal level. Mr. Brandenburg said the client needs to be instructed up front very carefully about the possibility of this occurring. Board Member Jennifer Tinsley asked for data showing how often client error overpayments/over-issuances occur and asked if the overpayment/over-issuance repayment is recovered based on a percent of the

amount owed or as a percent of the monthly benefit. Ms. Hernandez responded the over-issuance is recovered by reduction in the benefit. Mr. Thalheimer asked if there are any fees, interest or penalties charged in cases of client error. Ms. Hernandez said she was not aware of any, but she would look into it and report back.

7. **Information Item:** Nutrition Security Task Force: Adrienne Collins Yancey, Sr. Program Manager, Strategic Planning & Operational Support, Health & Human Services Agency (HHSA): Ms. Yancey began her presentation by providing the background of the Nutrition Security Task Force (NSTF). In April 2009, the County Board of Supervisors adopted the nutrition security plan to address low participation rates in CalFresh. The plan set the goal to add 50,000 children and seniors by June 2012. Shortly thereafter the NSTF shifted its focus to implement the plan and coordinate community resources to reach the plan's goal. The NSTF mission is to reduce hunger and food insecurity in San Diego county, increase the number of eligible San Diego residents enrolled in CalFresh focusing on the elderly, the disabled and low income families. Additionally, the NSTF assists community based organizations and the HHSA with CalFresh outreach by providing educational activities and helping to identify potential CalFresh eligible participants. Ms. Yancey acknowledged several of the community based organizations that make up the membership of the NSTF. She outlined specific activities that have resulted in increased participation in the CalFresh program, including outreach at San Diego schools and the Department of Housing and Community Development. The task force also focused efforts by conducting in-reach activities. By changing contract language with other county services and divisions, more potentially eligible CalFresh participants are provided with information on CalFresh or provided with assistance on enrolling in CalFresh benefits. Ms. Yancey said she will share a report at a later date of all the activities of the Nutrition Security Plan. She was pleased to announce the task force exceeded its goal by 124%, enrolling over 62,000 new children and seniors by June 2012. Going forward, one focus will be on the SNAP Participation Grant which, if funded, will get the feedback of the NSTF on grant implementation. Also, the Agency will utilize the input of the NSTF in developing the County Nutrition Action Plan. She reminded the board and members of the public in attendance the Nutrition Security Task Force holds its monthly meeting on the fourth Monday of each month from 1:00 - 2:30 p.m. at the Bayside Room of the County Administrative Center at 1600 Pacific Highway, San Diego. Ms. Fleming cautioned the board that if enough board members to constitute a quorum attended the Nutrition Security Task Force Meeting, it would require Brown Act compliance. She also clarified the CalFresh Community Nutrition Action Plan is receiving federal nutrition education funds and is a joint project involving both the California Department of Social Services and the California Department of Public Health Services Division.
8. **Information Item:** Agency Updates: Dale Fleming, Deputy Director, Strategic Planning & Operational Support, Health & Human Services Agency (HHSA): Ms. Fleming reported receiving notice of the County CAO Walt Ekard's retirement later this year. His position will be assumed by Helen Robbins-Meyer. In response to stakeholder requests, the new SSAB website will be adding SSAB Meeting agendas, minutes and handouts back to January 2011.

ADJOURNMENT/SET NEXT MEETING:

The meeting was adjourned at 10:53 a.m.

The next regular meeting will be held on **September 13, 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.