

Contra Costa County Employment and Human Services Department's Benefits Self-Screen Tool

AMABEL BAXLEY

EXECUTIVE SUMMARY

Contra Costa County Employment and Human Services Department (EHS) has been impacted greatly by the recession: they have experienced major down-sourcing, eliminated agency clerks, and laid off premium staff. The county has seen an increase in unemployment rates from 9.2% in February 2009 to 12% in March 2010. Coupled with low consumer spending, they have seen an increase in foreclosure rates and a decrease in home sales. The recession has impacted the budget of EHS; at the same time, there has been an increase in the number of customers seeking assistance.

In light of the recent surge in applicants for basic assistance and the decline in work staff, EHS needed to explore ways to provide additional assistance to families. They realized that they needed to find solutions to address the increased customer demands that would have little or no budget ramifications. They set forth to develop and implement an innovative Benefit Self-Screen Tool. The idea of the tool was to have a way for customers to go to the county website and determine if they might be eligible for certain benefits. This case study explores the development, implementation, and marketing process of the Benefits Self-Screen Tool. In addition, it examines how San Mateo County Human Services Agency might benefit from implementing this tool.

Amabel Baxley, Social Work Supervisor,
Children and Family Services,
San Mateo County Human Services Agency

Contra Costa County Employment and Human Services Department's Benefits Self-Screen Tool

AMABEL BAXLEY

Introduction

The recession has impacted all counties in California, and there has been a rising demand for county social services. Counties have seen increases in home foreclosures and unemployment rates, as well as decreases in home sales and consumer spending. Property and sales taxes are a county's primary source of revenue, and are used as the bottom line source for supplementing social services..

Contra Costa County Employment and Human Services Department (EHS), has been impacted greatly by the recession: they have experienced major down sourcing, eliminated agency clerks, and laid off premium staff. The county has seen an increase in unemployment rates from 9.2% in February 2009, to 12% in March 2010. Coupled with low consumer spending, they have seen an increase in foreclosure rates and a decrease in home sales. The recession has impacted the budget of EHS; at the same time, there has been an increase in the number of customers seeking assistance.

EHS began to see a new type of customer: one who had never applied for services before, who had assets, was recently unemployed or whose income was reduced, and who was well educated. This trend of customer often did not meet eligibility standards. Some applicants would wait up to three weeks to find out they did not qualify for services. They would return to reapply in even greater need after they spent down their assets. The increased demand of applicants impacted eligibility intake units and caused longer wait times to get intake appointments.

In light of the recent surge in applicants for basic assistance and the decline in work staff, EHS needed to explore new ways to provide additional assistance to families. They realized that they needed to find so-

lutions to address increased customer demands that would have few or no budget ramifications. They set forth to develop and implement an innovative Benefit Self-Screen Tool. The idea of the tool was to have a way for customers to go to the county website and determine if they might be eligible for certain benefits. This case study will explore the development, implementation, and marketing process of the Benefits Self-Screen Tool. In addition, we will see how San Mateo County Human Services Agency might benefit from implementing this tool.

San Mateo County has also been impacted by the recession. The county has seen a 2.3% increase in the unemployment rate in the past year. A slow housing market and low consumer spending has directly impacted the budget. San Mateo County Human Services Agency (HSA) has also seen an increased number of customers seeking social services. Like EHS, the new customer often did not qualify for services due to assets. This has caused wait times for drop-in applicants of up to three to four hours at its peak.

No county is immune from the downturn of the economy. Providing more with less is a common theme among counties, and for the families the county serves. Like Contra Costa County, San Mateo County has had to look at ways to do more with less. San Mateo County is smaller by comparison, but both San Mateo County and Contra Costa County are primarily suburban areas with diverse populations. According to the 2008 census, 712,690 people populate San Mateo County; and Contra Costa County is home to 1,051,677 people. San Mateo County spans 741 square miles, 449 square miles of which are inland. Contra Costa County spans 802 square miles, 720 square miles of which are in-

land. Both San Mateo and Contra Costa Counties are experiencing increased demands for services. It would be of value for San Mateo County to explore the Benefits Self-Screen Tool as an added service and resource.

Project Description

In light of the recent surge in applicants for basic assistance and a decline in staff, Contra Costa County Employment & Human Services (EHS), needed to explore ways to provide additional assistance to families. They wanted to see if there was a way for applicants to know if they qualified for benefits prior to applying. Management approved the idea, and a workgroup was developed in December 2008 to explore the possibility.

Phase I—December, 2008 to June, 2009

A workgroup was facilitated by Stefanie Pfingstl, Division Manager for the Bureau of Workforce Services, and Matthew Welch, Information System/Programmer Analyst III, provided technical guidance. First, they invited representatives from the EHS bureaus of Aging and Adult, Children and Family, Community Services, Workforce Development Board, and Workforce Services, because they wanted to include as many program areas as possible in the project. Three bureaus maintained primary representation in the workgroup.

The workgroup established the two major goals of the project, which were to:

- 1 Reduce the workload on intake units.
- 2 Provide a simple way for a resident to know whether he/she may be eligible for benefits without being onsite.

They also wanted to create a simple useful tool that was a realistic possibility, even with no budget allocated to the project. The workgroup explored different ideas and the idea of a web-based tool looked promising. They conducted research and looked at online tools from Pennsylvania and Washington State as possible starting points.

A sub-workgroup was developed to explore design questions that would include as many programs as possible. They realized that Medi-Cal would be too difficult to add as one of the program areas because of its lengthy application. They wanted the tool to be a simple, easy-to-use set of web pages, which could be used with little or no training. The tool would inform potential applicants if they were likely to qualify for services. A lot of effort went into the development of the tool's questions to ensure that the language used was easy to understand.

The workgroup developed basic questions that included qualifying questions for CalWORKS, Food Stamps, and General Assistance. After the questions were established, Matthew Welch worked on developing the tool.

The Benefits Self-Screen Tool

The workgroup made a conscious decision not to have personal information requested and not to store data within the tool. They also decided that applications would not be filed online and that the tool would have no interface with CalWIN. This was done to limit the impact on intake workers since once an application is submitted, it starts the application clock and the demand on workload would be too great.

The Benefits Self-Screen Tool was built using Microsoft's Visual Studio 2008 in the .Net framework 3.5., in a shared hosting environment with GoDaddy.com. GoDaddy.com costs \$60.00 for a host fee, plus \$6.00 to \$7.00 per month. The tool took approximately 40 hours per week for three to four months to develop.

Prototype

The Benefits Self-Screen Tool prototype was developed. It supported English and Spanish, and provided links to service fact sheets. Applicants could use a link to send site maintenance e-mails directly to Mr. Welch for technical assistance and to get questions answered. The prototype consisted of several web pages. The first page welcomes the user and provides information "About this site." This page is where the user can indicate an English or Spanish preference.

The second page explains the tool and confidentiality. The third page asks the user nine questions:

- 1 Are you a **resident** of Contra Costa County?
- 2 Counting yourself, how many **people** are in your home?
- 3 How many **children under the age of 18** live with you?
- 4 What is your family's **earned income** before deductions in a month?
- 5 What **other income** (child support, unemployment, disability, etc.) is received in a month?
- 6 How much money does your family **have** (cash, bank accounts, and credit union, etc)?
- 7 How much money does your family **pay** each month in child support?
- 8 Is there any person over the **age of 60** living in your home?
- 9 Is there a **disabled adult** living in your home?

The fourth page provides a grid with the following information: "Program Results" (CalWORKS, Food Stamps, and General Assistance), "Result" (e.g. may qualify, may not qualify), and "Reason" (e.g. meets minimum requirement income, assets above threshold, etc.). It also provides a link for applicants to see additional programs they may wish to apply for, and provides office locations, phone numbers, programs supported by each office, and a map link for directions.

Page five is a disclaimer that visiting the website does not constitute applying for benefits and explains that additional forms may need to be completed. The website has a link to forms with instructions on how to use the forms.

Once they had a prototype, they sent the link to current workers for review and feedback. They wanted workers to tell them what they thought about the site and to know if the questions complied with screening for the three programs. Additionally, they wanted to know if the site was easy to use and understand. Feedback was reviewed and changes were made where appropriate.

Next, they sent out information to community-based organizations (CBOs) to test out the tool, review the site and provide feedback.

Marketing

Once the tool was finalized, they started to market the Benefits Self-Screen Tool. An announcement from the EHS Director went out to anyone who had contact with the department: the library, CBOs, the Transportation Department, faith-based organizations, and the Department of Education, to name a few. They got the word out to anyone who would listen. Given that no budget was allocated to this project, they had no way of providing paid advertisement to help promote the tool.

Phase II—July, 2009 to January, 2010

The tool went live in July 2009, and it has been up 24/7 ever since. Since the workgroup made a conscious decision not to capture any personal data, the host site provides a site hit counter. They receive monthly reports from GoDaddy.com that outlines website activity. The site received 7,566 hits for the month of July 2009 and 15,828 hits for the month of February 2010. Matthew Welch continues to provide onsite maintenance support approximately one to two hours per week and still responds to e-mails. He also posts updated forms and information as needed and requested by policy division managers.

In January 2010, forms that could be filled out and printed were added to the site. This allows applicants to fill out forms, print them out, and have them ready to submit. This helps intake workers, as these applications are generally easier to read than the ones billed onsite.

Phase III—Ongoing

EHS continues to seek ways to enhance the tool and provide added service to customers. In the future, they hope to add a self-screen for Medi-Cal and to add the ability to submit applications via the website.

Observations and Challenges

The workgroup did a phenomenal job of utilizing internal resources to create the Benefit Self-Screen

Tool. This cross-bureau workgroup developed and successfully launched the Benefits Self-Screen Tool from conception to going live in eight months. They utilized minimal resources and had no marketing budget. The workgroup addressed the two major goals of the project, which were to:

- 1 Reduce the workload on intake units.
- 2 Provide a simple way for a resident to know whether they might be eligible for benefits without being onsite.

They successfully created a simple way for residents to know if they may they might be eligible to apply for services; however, because the tool does not obtain personal information or store any information, it is unknown how successful they were in reducing the workload of intake units. Since the tool captures a hit count instead of tracking the number of times the tool is utilized, there is no way of knowing how many people have benefited.

There were a few challenges for this project. The major ones involved marketing and budget constraints. The workgroup did its best to market the tool, but, in better economic times, they probably would have advertised in the local newspaper and/or through a poster on local public transportation vehicles. They would have also probably created magnets to hand out at events with the Benefit Self-Screen Tool website information. This would have gotten the word out to a greater audience.

Recommendation

San Mateo County Human Services Agency (HSA) should consider adapting the “Benefits Self-Screen Tool”, as it would benefit customers and the community. It enhances the mission, vision, and values of the agency to provide additional resources. People would be able to visit the site 24/7 to determine if they might qualify for services. It would enhance the current website and the service the HSA provides to the community. San Mateo County should establish a committee to review recommendations for implementation.

Outcome Measures

It is important to implement a component where outcome measures data can be obtained. I would agree with Contra Costa County Employment and Human Services Department (EHS) in not collecting personal information and data on the site; instead, the county can use a questionnaire at the benefit intake appointment when the worker can ask the following questions:

- 1 Are you aware that there is a “Benefits Self-Screen Tool” on-line? If not, would you consider using the site in the future?
- 2 Have you visited the site?
- 3 Did you visit it prior to coming to the appointment?
- 4 Was it helpful?

This would allow the agency to determine if an applicant utilized the Benefits Self-Screen Tool prior to the appointment. If applicants had not used it, they would be informed of the tool for future use.

Budget Considerations

Budgetary constraints are an important consideration when developing and implementing new services. There would be a budget impact for implementing this tool. I feel the impact would be minimal and worth the development of the tool, given the increased service it provides. The budget should include the following line items:

- Site registration fee of \$60.00 for host provider GoDaddy.com
- The cost of the site at approximately \$6 to \$7 a month
- The cost for development and maintenance:
 - HSA IT staff to develop the site (approximately 40 hours per week for two to three months to develop the site and get it going)
 - HSA IT staff (approximately two hours per week to answer e-mail questions)
 - San Mateo County IT staff (approximately one to two hours per month for maintenance)

- The cost for a benefit intake worker to gather information from the applicant for the questionnaire

Marketing

Marketing the tool would be essential to its success. The workgroup can explore alternative marketing plans. I would recommend a marketing budget of \$2,000 for the following:

- Send out a letter to all county staff informing them of the site.
- Distribute flyers to partners and CBOs.
- Develop magnets with web information to distribute at agency events.
- Advertise in a local newspaper.

Contra Costa County Employment and Human Services Department (EHS) implemented and outlined a successful plan for the Benefit Self-Screen Tool. HSA can develop and implement this tool with minimal funding and time. Implementing this tool would allow 24/7 access for customers to determine if they might not qualify for certain services, and it would allow them to fill out forms and print them for intake appointments. This would help benefit intake workers as the applications would be easier to read. Implementing the Benefit Self-Screen Tool would enhance the services HSA provides to the community.

Acknowledgements

I would like to express my appreciation to Matthew Welch, Information Systems/Program Analyst III, for sharing his time and knowledge, and for coordinating information and visits. I would also like to thank Stefanie Pfingstl, Division Manager, for taking the time to meet with me and for providing valuable information about the Benefits Self-Screen Tool project. Their knowledge, experience, and insights were invaluable.

Resources

Valentine, Joe, (2009, April 21) Human Services In a Time of Economic Crisis. PowerPoint Presentation Prepared for the Contra Costa Board of Supervisors, Martinez, CA.

Radin, Richard. (2010, March 26) County delivers dire economic projections, more bad news about budget. Retrieved, April 9, 2010, from *Contra Costa Times* website: <http://www.contracostatimes.com>.

Valentine, Joe, (2010, April 12) EHS Challenges: The Rise in Child Poverty Report for the Family and Human Services Committee. PowerPoint Presentation Retrieved, April 20, 2010, from Contra Costa County Employment and Human Services Department website: <http://www.ehs.org>.

United States Department of Labor. Unemployment data by county, not seasonally adjusted, February 2009–March 2010. Retrieved April 20, 2010 from Bureau of Labor Statistics Labor Force website: <http://www.bls.gov>.