

INCREASING CaIFRESH PARTICIPATION THROUGH COLLABORATION, OUTREACH, AND TECHNOLOGY

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EXECUTIVE SUMMARY

The Supplemental Nutrition Assistance Program, called CalFresh in California, not only helps low-income households put nutritious food on the table during tough economic times; but also, lifts millions of people out of poverty each year and helps boost local economies. During the past decade, lawmakers have worked to increase enrollment in CalFresh by eliminating fingerprint imaging and face-to-face interview requirements, simplifying the CalFresh application and reporting requirements, increasing gross income limits, and eliminating resource limits for most CalFresh applicants. Despite these changes, fewer than half of the people potentially eligible to CalFresh are enrolled.

Recently, the County of Santa Cruz implemented telephonic signature, contracted with Second Harvest Food Bank to staff a dedicated outreach team, and formed a Benefits Collaborative group that brings together county staff and community agencies to share information and develop coordinated efforts to improve community access to food, health, and other public benefits. This case study examines how Santa Cruz County implemented these recent initiatives and how it might help Marin County improve program access and increase CalFresh participation rates.

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Background

Food insecurity, defined as a lack of the resources necessary for consistent and dependable access to food, affected nearly one in seven families in the United States in 2014. Vulnerable populations, such as the elderly, disabled, and children, experience the highest rates of food insecurity and are the people most susceptible to the negative health impacts of poor nutrition (States, 2015). Research suggests that individuals whose nutritional needs go unmet have an increased risk for developing diabetes, heart disease, and depression. For children, food insecurity may also negatively affect social, emotional, and cognitive development and limit educational attainment (States, 2015).

The Supplemental Nutrition Assistance Program (SNAP), called CalFresh in California, is a federal program designed to supplement the food budgets of low-income households. The SNAP/CalFresh program is one of the most effective means of improving access to nutritious food for struggling families; yet, only 63% of eligible Californians participate in the program (Shimada, 2015). Each year, the California Food Policy Advocates (CFPA) calculates the CalFresh Program Access Index (PAI) for each county. The PAI measures CalFresh utilization among individuals who appear to meet eligibility criteria; and in the most recent report, Marin County ranked 55 out of 58 counties, with a PAI of only 38.2% (Shimada, 2015). According to the same report, if all individuals eligible to CalFresh in Marin County participated, the county would receive an additional \$21.6 million in federally funded benefits each year, which would

result in \$38.6 million of additional state and local economic activity (Shimada, 2015). This increase in economic activity is a result of agricultural supports; increased spending on food, which creates jobs; and the utilization of CalFresh Benefits freeing up money for low-income families to purchase taxable items, which increases local and state tax revenue.

Since the Great Recession (2007 to 2009), increasing SNAP/CalFresh participation rates has been a priority of both the federal and state governments. The County of Santa Cruz Employment and Benefits Services Division (EBS) and the County of Marin Health and Human Services (HHS) have engaged in efforts to increase CalFresh participation and reduce CalFresh churn rates, where individuals lose their benefits, usually due to missed recertification interviews or failure to provide required documents, only to reapply for CalFresh within 90 days. Some of the strategies employed by both counties to reach participation goals are: online application processing, outreach and collaboration with community based organizations (CBOs), text messages to clients when a report is due or when their benefits may be discontinued, and “in-reach” to Medi-Cal recipients who are likely to be eligible for CalFresh. Though EBS has several innovative practices that can be adapted and implemented in Marin County, this case study focuses on community partnerships and the Benefits Collaborative; the contract for outreach services with Second Harvest Food Bank (SHFB); and EBS’s implementation of telephonic signature.

Partnership and Outreach Contract with Second Harvest Food Bank

Santa Cruz County has contracted with the Second Harvest Food Bank (SHFB) to provide CalFresh education and outreach since 2010. According to Emily Balli, EBS Division Director, the implementation of online applications via Benefits CalWIN and a shortage of staff resources

prompted EBSD to extend the contract in 2015 to include paid CalFresh outreach workers. As part of the contract, the County of Santa Cruz provides funding for three bilingual outreach workers and additional administrative staff to provide training and quality assurance and coordinate outreach activities. The contract defines outreach service goals for the number of completed applications per outreach worker, specifies the location and frequency of outreach events that the SHFB needs to staff, and requires the SHFB to train community partner agencies on CalFresh outreach and education (HSD, 2015). The following are some of the agencies and events where CalFresh outreach workers regularly provide enrollment assistance and/or educational presentations: Watsonville and Santa Cruz Farmers' Markets, Veteran Services, In-Home Supportive Services (IHSS) orientations, Goodwill Career Center, and local churches, schools, and childcare centers.

At each outreach event the SHFB must ensure the availability of bilingual, Spanish-speaking staff and provide mobile laptop access to MyBenefits CalWIN for customers who wish to apply for benefits or need access to manage an existing case online. Portable scanners are available for customers to upload documents and required verifications, potentially shortening the application process or expediting the restoration process for discontinued benefits. Also, outreach workers carry cell phones that customers can utilize to access EBSD's Phone Customer Service Center.

In addition to funding outreach staff, the contract requires SHFB to operate a CalFresh Buddy Program and to facilitate a CalFresh Task Force. Through the CalFresh Buddy Program, SHFB educates twelve partner agencies and CBOs about CalFresh with the goals of increasing the effectiveness of outreach and improving the quality of the applications submitted by staff 'assistors' who help applicants fill out forms. The SHFB also acts as a bridge between the County of Santa Cruz Human Services Department (HSD) and other partner agencies and has

read-only access to CalWIN which allows them to check case and application status for clients. The CalFresh Task Force consists of high-level staff from HSD, SHFB, and a cross-section of agencies whose aims are to develop strategies to change agency culture to include promoting CalFresh, to better coordinate outreach without duplication of effort, and to inform the agenda for the Benefits Collaborative.

Benefits Collaborative

HSD launched the Benefits Collaborative in January 2015 in an effort to increase community awareness and access to benefits such as Medi-Cal and CalFresh. Its purpose statement is to:

“Ensure access to health care coverage, nutrition assistance, and other public benefits for all eligible Santa Cruz County residents.”

The planning process for the initial meeting involved identifying a location for the meeting, developing a purpose statement, and drafting invitation letters. According to Leslie Goodfriend, Senior Health Services Manager and the founder and facilitator of the collaborative, the original CBOs asked to join included “all agencies we knew had some role to play, either enrollment assistance or outreach and education.” Some of the over two dozen members of the Benefits Collaborative include: Second Harvest Food Bank, First 5 of Santa Cruz County, Salud Para la Gente, Community Bridges, United Way of Santa Cruz, Santa Cruz HSD, Pajaro Valley Shelter Services, Friends Outside, and Santa Cruz and Live Oak School Districts.

Each meeting includes agenda items submitted by participating CBOs, a deep dive training topic, and time for participants to ask a Benefits Representative Supervisor (Eligibility Supervisor) questions about CalFresh and Medi-Cal regulations and procedures. Some of the deep dive topics covered include: understanding CalFresh, Medi-Cal dual eligibles, identity theft, a review of

local CalFresh data, and a Covered CA open enrollment update. Most of the participants are front-line workers who understand the barriers to accessing benefits that their clients face and the pervasive myths that stop them from applying for CalFresh in the first place. Participation in the Benefits Collaborative gives these workers the tools and resources they need to dispel these myths and encourage potentially eligible people to apply. In addition, the meetings give HSD and CBOs the opportunity to develop common outreach strategies and messaging, as well as opportunities to communicate feedback and concerns in a collaborative and supportive environment.

At the invitation of Leslie Goodfriend, I had the privilege of attending the Benefits Collaborative meeting in Watsonville on March 17, 2016. The agenda for the meeting included an update on Medi-Cal enrollment efforts related to SB75, which will provide full scope Medi-Cal benefits for undocumented children; an update from community application assistants on Covered CA enrollment efforts; and the deep dive topic of the month: a CalFresh eligibility training led by the SHFB. The training covered CalFresh eligibility prescreening core concepts and also delved into special budgeting rules for households with mixed citizenship status and households with disabled or aged members. In addition, the discussion included strategies to dispel myths about CalFresh that persist amongst immigrant communities, working families, and seniors. The Benefits Collaborative continues to work to identify relevant agenda items that encourage and promote further collaboration and participation from all members.

Telephonic Signature

Both the counties of Santa Cruz and Marin have implemented technological and business process strategies aimed at increasing CalFresh participation rates and decreasing churn rates. The

availability of electronic applications, Benefits CalWIN in Santa Cruz County and C4Yourself in Marin County, has decreased lobby traffic and increased access to benefits for customers with reliable access to the internet and who experience barriers to coming to the county office. In addition, both counties have telephone service centers staffed by workers that are able to take applications, complete program recertifications, and remedy case problems over the telephone with the customer. However, one important technological tool that EBSD has employed that Marin HHS has not is telephonic signature, defined by Food and Nutrition Services as “an audio-recording made over the telephone of the household member’s assent” (USDA, 2014). CalFresh and CalWORKs applications require a retrievable recording, whereas Medi-Cal applications only require verbal consent and a journal entry in the client’s case file. This difference in policy has proven to be one of the major obstacles limiting the effective implementation of horizontal integration mandates, which call for counties to assess customers for all programs they might be eligible for at one time using one application, whenever possible.

In order to streamline processes and implement horizontal integration, the County of Santa Cruz contracted with ContractPal to develop a telephonic signature solution for EBSD that would meet regulatory guidelines and be easy for BRs to use. After one year of planning and roll out, the telephonic signature solution was officially implemented on June 1, 2015. BRs can now completely process CalFresh applications and re-certifications over the telephone without waiting several days for customers to return signed paperwork through the mail. In addition, telephonic signature significantly reduced the number of CalFresh application denials and re-certification discontinuances caused by client failure to return documents. Though it is too early to assess the full impact of telephonic signature, one EBSD staff member reports that CalFresh application approval rates have increased 10% since its implementation. By winter, EBSD plans

to implement telephonic signature for affidavits and SARS 7s, the semi-annual reports that CalFresh recipients must complete and return to the county in order to retain access to their CalFresh benefits. Failure to return SARS 7s, and associated verifications, is another leading cause of CalFresh discontinuances and reapplication churn. EBSD expects that electronic signature will prove an effective tool for limiting these discontinuances.

Recommendations for Marin County

Form a Mobile Outreach Unit

Like Santa Cruz County, Marin County has a partnership with the local Food Bank (San Francisco-Marin Food Bank) to provide outreach, education, and application assistance. In addition, through private funding sources, the Food Bank pays CalFresh application assistors \$55 per successful application. At this time there are twelve non-profits participating in the program, but nearly all of the applications come from one agency, the Ritter Center. According to the assistors, the main reason they don't complete CalFresh applications is that it is too difficult and time-consuming to do on top of their primary duties (Danino, 2016). The County of Marin should continue to work with the Food Bank to provide CalFresh education and coordinate outreach efforts; but, instead of contracting with the Food Bank to provide outreach staff, it is suggested that HHS hire eight additional EWs and a supervisor dedicated to CalFresh, CalWORKs, and Medi-Cal outreach efforts.

Creating a dedicated unit of outreach eligibility workers would enable the county to better collaborate with CBOs, improve its visibility and reputation in the community, and improve access to its services in all parts of the county. Currently, the public assistance offices are located in San Rafael and Novato, leaving many residents in southern Marin County, the San Geronimo

Valley and West Marin, with significant transportation barriers to accessing services. Although one Eligibility Worker (EW) is stationed in Point Reyes Station, public transportation is limited and many potential clients in West Marin have to travel long distances in order to reach that office. Moreover, many low-income residents lack reliable high speed internet and/or cell phone service, further limiting the utility of electronic applications and telephone service options. EWs in the outreach unit could be regularly scheduled to work at specific events, community clinics, schools, farmers' markets, and food pantries, resulting in more equitable access to CalFresh, Medi-Cal, and CalWORKs benefits across the county.

Another benefit is that a mobile unit of outreach EWs would result in more streamlined service provision for CalFresh applicants. From beginning to end, EWs can complete the entire in-person application process with a client in about 30 minutes; whereas an application assistor can only start the process and forward the application to an EW who needs to conduct an interview—requiring clients to tell their stories a second time—and wait for signed paperwork to be returned to the county. Moreover, an EW can determine whether or not a client would qualify for Medi-Cal or CalWORKs and initiate those applications at the same time, better integrating client services and saving time for both the client and the EW.

In order to implement the plan HHS would need to:

- Identify funding sources—EBSD used its CalFresh allocation funds to finance the contract with SHFB.
- Obtain Board of Supervisors approval for additional staff, then hire and train staff.
- Purchase laptops, portable scanners, and printers to enable EWs to completely process applications out in the field, and coordinate with IT to implement mobile work solutions.

- Convene focus groups, with the help of CBOs, to assess community needs and develop strategies for working together to maximize outreach effectiveness.

Implement Telephonic Signature

Like Santa Cruz County, Marin operates a call center, and, though the Santa Cruz Phone Service Center is much larger and more robust than the one in Marin, Marin County is in the process of growing and evolving its call center operations. Telephonic signature would make first contact resolution for applications, changes, and case problems possible, resulting in more streamlined processes and better customer service. Important steps include:

- Reaching out to C-IV to determine whether there is a telephonic signature solution in the works and county phone services to see if there is a solution in the county for voice recording and data storage.
- Contacting counties that have implemented telephonic signature to get information about the implementation process, including funding and business process change management, and getting contacts for potential contractors to do the work. According to EBSD, the process took one year from planning to implementation and involved program analysts, program managers, IT staff, contract staff, and eligibility supervisors.
- Identifying potential funding sources. EBSD utilized CalFresh allocation funds for the project, budgeting \$170,000 for two years, but actual costs have been closer to \$100,000.
- Adopting contract language and tools already developed by EBSD. Though the process took one year to implement in Santa Cruz County, it would likely take Marin County less than six months if it leverages the contract language approved in Santa Cruz County and

adopts some of the business process change management tools, scripts, and procedures developed by EBSD.

Start a Benefits Collaborative

Based on the experience of Santa Cruz County, it would take the County of Marin only a few months of preparation and very little funding to establish a monthly forum where HHS staff and community partners could gather to share information, resources, and concerns. The department would have to designate a facilitator, find a meeting space, define the purpose, and identify and invite the relevant parties to the table. Though county workers and administrators already attend a variety of community forums, a meeting focused on collaborating with CBOs to improve access to all public assistance programs would help everyone to better coordinate and maximize the county's collective efforts to reach those in need. Furthermore, monthly meetings would allow HHS and CBOs to develop a relationship where ongoing feedback and constructive discussion would lead to the identification and implementation of more effective and culturally-appropriate business processes.

Summary

Though CalFresh participation rates have increased from 29.8% to 38.2% since 2010, Marin County still has a long way to go to reach its participation goals. Implementation of telephonic signature, the formation of a dedicated outreach unit, and increasing collaboration between eligibility staff and CBOs would help the County of Marin to realize significant increases in CalFresh participation and improve coordination and delivery of vital social services to all residents in need.

Acknowledgements

Thank you to my gracious hosts in Santa Cruz County who welcomed me and took the time to describe their programs, answer my questions, and introduce me to staff who could share valuable insights: Leslie Goodfriend, Senior Health Services Manager; Emily Balli, Director of Employment and Benefits Services; Andrew Stewart, Staff Development Manager and BASSC liaison; Lainie Gray, EBSD CalFresh Analyst; and Jim Dale, Senior Analyst. I would also like to thank those in Marin County who offered their support and encouragement: Heather Ravani, Chief Assistant Director of Health and Human Services; Angela Struckmann, Social Services Division Director; and Racy Ming, Social Services Division Director and BASSC liaison.

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