

# Sonoma County's Hybrid Mobile Work Project: Implications For San Francisco County

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## EXECUTIVE SUMMARY

San Francisco Human Services Agency (SF-HSA) continues to hire staff to keep up with the increasing amount of clients the new Affordable Care Act brings. As more staff is hired, more office space is needed. Looking into Sonoma County's Hybrid Mobile Work Project could benefit San Francisco HSA.

Sonoma County Human Services Department's Adult and Aging Division piloted a hybrid mobile work project about two years ago in response to the same challenge: the need for additional office space.

The pilot had such success, that it is now a part of the normal operations process in the Adult and Aging Division. Sharing cubicles, one per two mobile workers, has enabled the department to better utilize existing office space and to hire more staff.

Adopting this model would allow SF-HSA to maximize its resources by better utilizing its existing office space and minimize onsite client traffic. It would also allow staff to continue to do effective outreach work

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## Introduction

The number of people human service agencies serve has increased significantly since the Affordable Care Act (ACA) was passed by the U.S. Congress in 2010. This new law has made it possible for millions of people to be newly eligible for health insurance. Human service agencies are now serving thousands of new clients from the low-income, non-disabled, non-elderly, and childless adults demographic. In addition to helping clients enroll in county-based health insurance, counties are expected to help enroll clients in the CalHEERS state system. This change brought about the need for more staff. The one challenge that comes with increased staffing is the need for more office space.

San Francisco Human Services Agency (SF-HSA) grew from a caseload of 45,000+ Medi-Cal cases in 2013 to a caseload of 95,000+ by the end of 2014. Due to the increase of caseloads, SF-HSA integrated Medi-Cal and CalFresh offices to be able to serve more clients. With the integration and hiring of more staff, SF-HSA increased its staff of 129 Eligibility Workers (EW) capable of doing Medi-Cal to 233. SF-HSA also remodeled all its lobbies and offices to better accommodate the staff and clients. Lastly, SF-HAS recently started telecommuting and mobile work units. The department should continue to look into other venues that can create more office space as more staff is hired.

This case study reviews Sonoma County Human Services Department's strategies and efforts to maximize utilization of office space while increasing staff and draws implications for the San Francisco Human Services Agency.

## Background

Sonoma County Human Services Department (HSD) is working towards increasing staff in various divisions in order to meet the daily needs of its customers. Sonoma County HSD has six divisions, and within the last few years has grown from having 660 full-time positions to 920. As a way to solve the issues of needing more workspace and needing to provide outreach services, Sonoma County has introduced mobile work into two of its divisions – Adult and Aging and the Economic Assistance Division. Although each division decided to go mobile for different reasons, there is a lot to learn from both of their experiences.

## Adult and Aging Services Division

Adult and Aging Services has increased its staff from 81 full-time employees (FTE) in 2012 to 107 FTE by 2014. Because of the need to increase staff and lack of more office space, the Adult and Aging Services Division explored the mobile workforce concept. In July of 2013, it looked into Alameda County's Adult and Aging model and Florida's APS model to review and examine how they operated with a mobile workforce.

Once Sonoma County's Adult and Aging Services defined how the mobile workforce should look and function, it launched a "Hybrid Mobile Work Pilot Project." The pilot designated pairs of staff members in the same program to share a cubicle. A schedule was developed to alternate the use of the cubicles and the days that staff would be out-stationed. In October of 2013, the agency started the pilot with ten mobile workers. Space-sharing (two

workers to a cubicle the same size as the other workstations) allowed for five cubicles to be freed up. The staff was equipped with the technology needed to complete work outside of the office—staff was provided with laptops, iPhones, mobile printers, and mobile scanners. Additionally, the Adult and Aging Division invested in sit/stand workstations for each mobile work cubicle to accommodate the ergonomic needs of two different people sharing the same workstation. The division also offered “hoteling” workstations in buildings with the purpose of providing additional workspace. A “hoteling” workstation is an unassigned cubicle or office network equipped with a PC, printer, phone, and Wi Fi. Staff members reserve hoteling workstations using Outlook room calendars or Intranet conference room listings. Currently three out of the eight buildings have “hoteling” stations. Staff can be accommodated at the other five facilities, if requested. Staff can also do their work at any other place they are comfortable with as long as a hotspot is provided or an internet connection is available.

Sonoma County invested a significant amount of time using its Public Assistance Systems Specialist (PASS) to provide training and technical support. PASS also provided long-term follow-up to ensure that the technology component of mobile work was not a barrier to being productive in the field. Social workers no longer have to report in everyday at the office; instead they are to report in by other means, such as phone, text, email, etc. Since their launch, Sonoma County now has 28 mobile workers vacating 14 cubicles because one cubicle is shared by two staff members.

### **Economic Assistance Division**

The Economic Assistance Division (EA) started mobile work for outreach purposes rather than for lack of workspace. The EA Division processes Medi-Cal, CalFresh, and General Assistance. One of its main purposes is to increase CalFresh participation. EA and Adult and Aging used the same selection process to choose the mobile workers. It is detailed below. EA started with and continues to have

six mobile Eligibility Workers (EW's). The EW's work in different community based organizations (CBOs) providing outreach to those who normally would not come into their offices or seek help on their own. The division identified populations that were historically underserved due to the many barriers these populations encounter when applying for public assistance. Some barriers included distance, transportation, complexity of application requirements, waiting to get an appointment with an EW, etc. EA targets mostly seniors, veterans, homeless individuals, and new immigrants with US-born children. EA works with these CBOs solely on good faith and have no contract agreements with them. Most CBOs agree to make appointments for the clients so that the eligibility workers have a list of clients to see. They rotate throughout the county where there is need and focus on providing services in remote areas. Clinics, shelters, elderly homes, VA offices, and health fairs are other avenues used to provide outreach.

### **Selection Process and Employee Expectations for the Hybrid Mobile Pilot**

Although staff was asked to participate on a volunteer basis, a selection process was used that included the following requirements. Employees in the hybrid mobile work pilot:

- must be off probation,
- must not have active performance issues,
- must agree to adhere to the parameters of the pilot program, and
- must have ergonomic needs that can be met in a shared workspace and mobile work environment.

Expectations of employees in the hybrid mobile work pilot included the following. All employees in the pilot program must:

- strictly adhere to county, HSD, and program confidentiality policies.
- provide timely feedback to supervisors and managers regarding any concerns with the pilot program.

- work with supervisors to determine the best way to receive supervision and oversight in the new pilot program. Any employees not meeting these expectations/parameters will be removed from the pilot at any time.

### Success and Challenges

The Adult and Aging Hybrid Mobile Pilot evaluated its work through ongoing meetings with a focus group. The focus group consisted of mobile workers, PASS, supervisors, managers, and IT. Staff were also surveyed to measure their satisfaction levels with the mobile work. In general, mobile workers were very satisfied with the pilot while supervisors reported more concerns.

Findings from the surveys and focus group meetings suggested that mobile workers felt more productive in the new work setting because they had fewer interruptions. The geographic scheduling increased efficiency because workers did not have to waste time driving to and from work. They chose to work closer to their scheduled appointments allowing them to get to clients faster and easier. The sense of freedom and flexibility felt by the mobile workers increased their morale. Supervisors on the other hand missed their staff and felt they did not have a real way to measure their staffs' performance and work. Supervisors also felt the need for more training to learn how to cope with the changes in relationships, technology, and supervision. A challenge that was faced during the process was loss of socialization among staff/coworkers. Staff also encountered many technological issues, especially during system outages and found it difficult to obtain assistance. Another issue included when vehicles were not available at several access points. This meant they would have to travel longer distances to obtain a vehicle. At the beginning of the pilot not all supervisors and social workers had smart phones which made it harder to communicate with each other. And lastly, supervisors felt that the measurement of mobile work had been anecdotal since there was a lack of quantitative data.

Guidelines were established to help meet these challenges. First, mobile workers had to check in and

check out at the beginning and end of their work day by calling, texting, or emailing their supervisors. The social workers were also expected to call in and consult with their supervisors when they encounter issues, just as they would if they were in the office. It had to be made clear to the staff that mobile workers are not to stay home to care for any family members unless they called in sick, and that they are to be available during work hours. To help with the feelings of alienation, workers are expected to show up to all unit meetings and be in the office twice a week. In addition, supervisors tried to have team-building exercises for their units. It was made clear that mobile work is a privilege and in order to continue, staff must maintain their productivity and adhere to all rules. The Adult and Aging Division, with regards to IT issues, is looking into having a designated IT person to be readily available to assist when an IT issue arises. More training and "How To's" are being developed for staff as the need arises. When new equipment is obtained, trainings are conducted on how to use it. The division has ordered new office phones and i-Phones for all supervisors and staff, giving them a better means of communication. It also suggested that the unlimited phone data plan be adequate so there is no extra expense. Most workers are now ready to go mobile at any given moment the department decides to add them. All they would need is a mobile scanner and mobile printer. There is no true matrix to measure work but there has not been any noticeable decrease in productivity, and mobile staff has produced equitable amount of work as compared to their in-office staff counterparts. An important conclusion from the pilot is that the ideal candidate for a mobile worker is someone who is flexible, adaptable, and organized. Having these strengths tend to help the workers adapt and work more independently.

The project was brought forward to the union in a 'meet and confer' process, and the union had minimal feedback for the county. The county believes it was mostly due to staff's satisfaction with the mobile work pilot. The pilot noted there are no confidentiality issues by going mobile. With staff

being more aware of their surroundings, following all the confidentiality rules, and using the VPN (Virtual Private Network). it helped to maintain the confidentiality pledge.

### **Conclusion/Recommendations**

The Sonoma County HSD directed an in-depth hybrid mobile work pilot and studied the logistics of how it would be possible to share space in order to achieve the goal of creating more office space. The success of the hybrid mobile work in Sonoma County has been such that this pilot was approved and is now part of the normal operations process of the Adult and Aging Division.

San Francisco County has also recently begun mobile work. The current mobile work is for outreach purposes similar to the mobile work in Sonoma County's EA division. San Francisco HSA would benefit from adapting some of the components the hybrid mobile work in Adult and Aging has implemented, including cubicle sharing. Using the two models combined addresses the need of creating more work space for the growing number of staff and doing outreach as well. Taking lessons learned and findings from Sonoma County, it is recommended that San Francisco County:

- appoint a contact person in the department to plan and measure mobile work and support personnel—such as IT and Staff development,
- invest in laptops, iPhones, mobile scanners, and mobile printers for mobile staff as well as smart phones for supervisors and managers for better communication,
- create team support—think through ways to encourage staff interaction, such as team building exercises, weekly meetings, and requiring staff to be in the office once or twice a week,
- invest in sit/stand workstations for each mobile work cubicle to accommodate the ergonomic needs of two different people sharing the same workstation,

- shift hiring practices to hire candidates more suitable to mobile work – staff that is flexible, adaptable, and organized,
- look at mobile work as a privilege to help the staff accept cubicle sharing and continue with the same for more productivity,
- create “hoteling stations” in other facilities, and
- nourish the relationship with CBOs and other facilities in order to develop agreements to use their premises as workstations and facilitate their ability to continue outreach efforts.

Sonoma County's hybrid mobile work provides many benefits that would help enhance the emerging mobile unit to reach the goal of maximizing office space in SF-HSA.

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