

# Understanding Outreach Strategies to Increase Participation: A Review of Sonoma County’s Outreach Unit

JAMES CHOI

## EXECUTIVE SUMMARY

*“By three methods we may learn wisdom: First, by reflection, which is noblest; Second, by imitation, which is easiest; and third by experience, which is the bitterest.”*

—Confucius

California has the lowest CalFresh participation in the nation (FRAC, 2015). It is estimated that between 6-11% of all Californian households receive food stamps (Danielson, 2014), which means that only about 53% – 62% of eligible individuals within the state (Shimada, 2013) are accessing these benefits. The story in San Francisco is even more concerning; only an estimated 5% of the households are receiving CalFresh benefits (Kirk, 2013). Outreach efforts have helped increase California’s participation over the years as evidenced by an estimated 3% increase in participation from 2009 to 2013 (Governing, 2013). It should be noted that San Francisco also has a long history of innovative outreach efforts geared towards

improving access as well expediency of the provision of benefits: CalFresh in a Day, Restaurant Meals Program, Integrated Intake (CalFresh/Medi-Cal), BenefitsSF, and others. Still San Francisco has one of the lowest participation rates (PAI) in the state. In an effort to garner new ideas for outreach, a review of Sonoma County’s CalFresh outreach practices was conducted. This effort yielded the following recommendations: conduct CalFresh outreach efforts in non-nutritional venues, utilize other service connections as opportunities to market CalFresh services, conduct joint training with community partners, and improve reporting to community partners regarding application status.

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## Introduction

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It should be noted that San Francisco also has a long history of innovative outreach efforts geared towards improving access as well expediency of the provision of benefits: Food Stamps in a Day, Restaurant Meals Program, Integrated Intake (CalFresh/Medi-Cal), BenefitsSF, and others. Still San Francisco has one of the lowest participation rates (PAI) in the state. To increase participation in San Francisco, more outreach is needed. More specifically, it is important to learn from other counties and learn from their efforts to enhance and grow a more effective CalFresh outreach strategy.

In an effort to garner new ideas for outreach, a review of Sonoma County's CalFresh Outreach Unit and practices was conducted.

## Sonoma's Efforts

Sonoma's outreach efforts have many noteworthy elements; however, the ones that stand out most are ways in which Sonoma developed and leveraged partnerships, streamlined its business processes, utilized technology, and improved reporting.

## Developing Partnerships

Sonoma has worked diligently at developing and leveraging strategic partnerships with traditional partners and across programmatic lines. It has partnered with Community Based Organizations (CBOs) and Faith Based Organizations (FBOs) to increase its CalFresh participation. As a result, these partnerships have been the key to increasing CalFresh participation. CBOs and FBOs assist Sonoma County's application process and bring in an average of 200 applications per month. These partnerships foster an innovative spirit amongst their partners as well.

Sonoma, like many counties, has been working with their local Food Bank to increase CalFresh participation. The Food Bank in cooperation with Sonoma has developed processes to link Food Bank recipients with CalFresh benefits. The Food Bank uses its pantry network to encourage participants to request for CalFresh. The Sonoma Food Bank has also established a store on its property for

low-income individuals and CalFresh recipients to buy grocery items at a discounted price, which the Food Bank has negotiated with local producers.

Additionally, Petaluma Bounty and Redwood Community Health Coalition, both CBOs, have assisted in increasing Sonoma's CalFresh participation by setting up "Bounty Farmacy." This allows a clinic to provide its clients with a Produce Prescription, which allows clients to purchase fresh produce at a discounted cost. The Petaluma Bounty brings local produce to the clinics to sell to participants even if they aren't eligible for the Produce Prescription. This encourages healthy eating and opens the door to engage the public in education on CalFresh assistance. Redwood Alliance Health Coalition works with its staff to increase CalFresh participation by asking clients that come in for Medi-Cal services to apply for CalFresh assistance as well.

### **Streamline Business Process**

Streamlining business processes is another way Sonoma County has increased participation. This includes creating a mobile unit to do intakes at the CBOs/FBOs sites within the community. The creation of the unit was a decision that was not taken lightly.

The mobile unit gave the program the flexibility to reach out to under-represented populations such as Latinos and the elderly. In addition, creating a unit of mobile Eligibility Workers (EW) which can handle the intakes taken at CBOs/FBOs sites aided in building a stronger relationship with the community, speeding up eligibility determinations, and helping clients to get questions answered in a timely manner. Sonoma's EW became a member of the community by becoming a resource that people can go to for assistance.

It should be noted that the mobile unit does not just process applications, but it also offers training; thus, improving the accuracy of applications that are submitted by the CBOs/FBOs, in turn, increasing application approvals and participation.

### **Improved Technology & Reporting**

Moving a unit of workers into the community presented some technical challenges. Early on Sonoma County recognized that having the appropriate technology was critical for outreach in the community. Currently in the county, workers are issued laptops with mobile hotspots, wireless printers, and scanners. This technology makes it possible for the EW to work off site and in the community and offer services that in the past was usually done in the main office. Printers and scanners help the workers provide county letters and to receive client documents timely and efficiently without creating a barrier for customers.

Furthermore, Sonoma County created reports to provide information to its CBOs/FBOs using this technology. These reports have been critical to helping CBOs/FBOs increase applications and accuracy of those applications. The county generates two major reports to CBOs/FBOs.

One of the reports highlights the total number of applications submitted in the month and notes the current application count that month and for the year. This report also includes the approval rates that help CBOs/FBOs know how they are doing in their overall goal of reaching 80 % approval rates. This report is generated through the use of the Information Technology (IT) team so there is no impact to the Sonoma County's outreach unit.

The second report the county generates is done manually by the outreach unit. This report captures the denial applications and how case dispositions were rendered. At the end of the report a summary is provided to help CBOs/FBOs understand the causes of denials. This aids in identifying potential training areas for CBO/FBO staff.

### **San Francisco's Current Efforts**

In April 2015, San Francisco started a mobile outreach unit using principles learned from other counties, including Sonoma. Prior to having a mobile unit, the CalFresh program had primarily organized its

own outreach. However, during the past two years, San Francisco Human Service Agency (HSA) has worked to integrate many social services programs. CalFresh and Medi-Cal integration has helped the new mobile unit to streamline application intakes for both resources. This also made it easier for the participants to get questions answered.

Additionally, San Francisco County started to expand outreach through the use of the CalFresh Coalition of CBOs/FBOs. This coalition has continued to grow as HSA works cooperatively with the San Francisco and Marin Food Bank to do outreach and training. However, San Francisco County is far from its goal to increase participation and decrease churn.

### **What We Can Learn From Sonoma**

Sonoma County has a successful outreach model. It developed an outreach unit to assist in providing benefits. It formed and leveraged important existing and new partnerships and changed its business and technology processes to make its outreach unit a success.

Utilizing established networks in the hospitals, CBOs/FBOs have the ability to potentially increase applications and stop churn. San Francisco County currently works on outreach CalFresh with the help of its coalition but has not worked with health care workers who are currently helping customers get on Medi-Cal. With the advent of health care reform, it has become apparent that more people can be reached and access benefits through this partnership. Most customers who qualify for Medi-Cal can potentially be qualified for CalFresh as well. Working with hospitals and clinics makes sense for San Francisco's CalFresh program since there is a dual eligible factor, and the customers are able to get enhanced services when work is done together.

However, improving internal business processes and acquiring technology to improve workers' ability to perform off-site is also essential to the success of outreach. Currently, HSA is developing business processes for outreach sites to allow applications to be registered while a customer is with staff. HSA is

taking steps to increase its participation outside of the office while learning to balance current business processes to meet the needs of the in office processes. When a client misses his or her appointment, San Francisco is currently having another worker call him or her back. However, San Francisco's CalFresh program has learned that there is a benefit to having the outreach worker contact the client and not the in-office staff in terms of rapport and community building.

It is also worth noting that as outreach increases, the demand for technologies increases. Currently at outreach events there is a request for the Information Technology (IT) team to join the event as a necessity to provide support. In Sonoma County, workers were able to support events without the help of an IT staff by providing all the tools necessary for the worker.

Reporting is another element that has helped Sonoma County enhance its outreach that San Francisco needs to adopt. Using IT to develop reports and have it generate reports for CBOs/FBOs will save EW staff time and allows them to focus on their other roles. San Francisco also needs to provide training and support to CBOs and FBOs to be successful at enhancing outreach. It is known that creating reports and having IT develop these reports takes time and money but the belief is the time savings for staff will be more valuable than the initial costs. Reports that IT currently run for programs take about two months, and if time is spent to develop it, the total time, HSA will need to implement this similar report is about three months. The major challenge is to design these reports so that they meet the needs of the CBOs/FBOs as well as the county.

Changing the perception of how CalFresh reaches out will be key to San Francisco's future. San Francisco County is no longer outreaching CalFresh as a stand-alone program but as a dual process. San Francisco, with integration in mind, will outreach Medi-Cal and CalFresh during outreach events, following the successful examples of Sonoma County. It can plan to have EW support on CBO/FBO sites and become community ambassadors to

help customers apply for benefits and help customers become self-sufficient. This can be a costly endeavor but reaching out to the community to offer CalFresh and Medi-Cal is believed to be key to increasing applications.

## Conclusions and Recommendations

A review of Sonoma's Outreach Unit and strategies revealed a number of potentially new opportunities for San Francisco in terms of expanding and enhancing its current CalFresh outreach efforts. This effort has yielded the following recommendations:

- **Conduct CalFresh outreach efforts in non-nutritional venues:** Similar to how Sonoma County utilized clinics and hospitals to generate referrals, San Francisco County's CalFresh program should look to leverage the agency's relationships with community partners from other HSA administered programs.
- **Utilize other service connections as opportunities to market CalFresh services:** As San Francisco County continues to move to a Call Center/Service Integration models for service delivery, it should look for opportunities to cross-refer clients to services. San Francisco's CalFresh & Medi-Cal and CalFresh & CAAP programs have already been completing some joint applications, but there may be additional opportunities that could be explored, for example, IHSS service providers and/or recipients of San Francisco's Working Families Tax Credit.
- **Conduct joint training with community partners:** To improve the quality and approval rating of applications completed by community partners, HSA should conduct joint trainings with its community partners regarding the CalFresh program, including information about basic eligibility and what constitutes a good application.

- **Improve reporting to community partners regarding application status:** San Francisco's CalFresh program should work with its IT Department to improve reporting to community partners specifically in the area regarding tracking the status of applications and reasons for denials. By allowing community partners to see an application status and denial reason would allow them to respond to and set more realistic expectations about timeframes for clients and potentially identify problem areas in completing applications.

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