

# **SANTA CRUZ COUNTY HUMAN SERVICES DEPARTMENT'S**

## ***WeCARE* MODEL**

**Jennifer Klein**

### **EXECUTIVE SUMMARY**

Counties throughout California continue to experience changes in their approach to delivering Human Services as well as the management and administration of these services. To address these changes, Santa Cruz County Human Services Department (HSD) initiated *WeCare* in 2013 and completed implementation in 2015. Contra Costa County Employment and Human Services Department (EHSD) implemented a similar program named Office of the Future in 2008. Both solutions addressed customer services, self-service tools for customers and facilities upgrades. Both counties had to deal with a myriad of supportive systems for CalWIN and had to decide what the best solution was for their county with their differing needs. In conclusion, there is no right or wrong solution to address burgeoning service delivery, each county has different needs. One recommendation is that the state, consortia and counties should look at systems more comprehensively for all programs, not just those included in CalWIN.

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### **Introduction**

Counties throughout California continue to experience changes in their approach to delivering human services as well as the management and administration of these services. State and federal mandates, as well as advances in technology, are the catalysts for many of these changes.

Changes have occurred at an accelerating rate over past several years in a number of areas including:

- Amended CalWorks and CalFresh regulations
- Amended Medi-Cal eligibility requirements
- An expanded subsidized employment program
- New federal Workforce Innovation and Opportunity Act
- New Family Stabilization program for the Welfare-to-Work program
- State funding for commercially sexually exploited children
- Extended foster care up to age 21
- New State Earned Income Tax Credit (EITC) and
- State Coordinated Care Initiative – Pilot

All these provisions have increased services and benefits for families in California. Counties are tasked with the delivery of these services along with specific methodologies on how to deliver these services. Fortunately, technology is assisting with the delivery of expanded services and the administration of the programs. Organizations, such as California Welfare Directors Welfare

Association (CWDA), the Bay Area Social Services Consortium (BASSC) , CalWIN and C-IV consortiums allow counties to collaborate and share best practices. This paper will chronicle Santa Cruz County's approach and make comparisons with Contra Costa County's model.

### ***WeCare***

Santa Cruz County initiated *WeCare* in 2013 and completed implementation in 2015. Andrew Stewart, Staff Development Program Manager for Santa Cruz County Human Services Department (HSD), refers to *WeCare* as a cultural change for the department and notes that the *WeCare* model is not “customer service training” but rather a “customer experience.”

*WeCare* is an acronym for:

**Welcome** and personalize customer

**Engage** and clarify expectations

**Communicate** and gather information **Address** customer needs

**Review** and resolve questions and concerns

**End** on a positive note

This approach relies on “soft skills” and includes the philosophy of good manners, optimism, common sense, empathy, and an ability to read a situation as it unfolds and decide on the correct response. Set scripts are given to Benefit Representatives such as “I apologize for having to call you by a number, but this allows us to better serve you”; “My name is \_\_\_\_; may I call you by your first name?”; “This interview may take some time, are you OK with that?” There are many more suggested scripts but all are friendly and respectful in tone. Benefit Representatives are trained for inbound calls for Medi-Cal, face-to-face interviews for new applications and

outbound calls for CalFresh applications. Customers are also asked if they want to see if they are eligible for any other services. If not eligible for HSD services, customers are given other community resources that might be helpful. Although it is a governmental agency, HSD is built on the practices of private organizations, such as Starbucks, Zappos, and Ritz Carlton for the customer experience or “mint on a pillow concept.”

Santa Cruz County Human Services Department’s mission statement, values and motto invoke a comprehensive approach to human services.

To further offer optimum services, Santa Cruz County’s HSD also has done away with the designations of Eligibility Worker I, Eligibility Worker II and Eligibility III’s (EWI, EW II, EWIII) and introduced a position of Benefit Representative at the same level of an EWIII. The agency predicted there would be a tsunami of incoming work due to the Affordable Care Act (ACA). In preparation for this expected workload, HSD wanted more flexibility in providing services using as many of its existing staff to the greatest degree. EWI’s and EWII’s were used mainly for ongoing cases while the EWIII’s were charged with processing new cases. As the number of new cases increased the change to Benefit Representatives allowed all cases to be covered by this new job classification. The same worker could work on renewals, new applications, CalFresh, etc. The county worked well with the union as it was a “Win-Win” for staff, management and customers.



At Contra Cost County Employment and Human Services Department (EHSD), a three month training course for new Eligibility Workers is offered several times a year. The first week includes training on customer service and professionalism. These are reinforced throughout the three months as the trainees increase their knowledge base. Trainers use PowerPoint

presentations, handouts and UC Davis classes. Exercises with different scenarios are rehearsed based on different customer interactions. Tenets such as the ABC's of Customer Services are used.

ABCs of Customer Service  
By Business Training Works

- A. Arrive to work on time, prepared, and with a smile.
- B. Believe in the organization and the products or services you are representing.
- C. Choose an attitude of service. Your customers should feel that you enjoy your job.
- D. Dress appropriately for the work that you do.
- E. Empathize with customers, and show them that you understand.
- F. Find answers if you don't have them.
- G. Give customers outstanding service even when they are not nice to you.
- H. Help coworkers and other internal customers when needed.
- I. Initiate contact with customers when necessary.
- J. Justify your reasoning and offer any resources and options whenever possible.

**Intake Technology**

Both Santa Cruz and Contra Costa are CalWIN counties. There are 58 counties in the state; 18 are CalWIN (CalWORKs Information Network); 39 are C-IV (Consortium –IV). Los Angeles County stands alone with a system called LEADER (LA Eligibility Automated Determination, Evaluation, and Reporting). CalWIN, C-IV and LEADER are separate consortia recognized by the California's Office of Systems Integration (OSI). OSI's mission statement is to procure, manage and deliver technology systems that support the delivery of health and human services. There have been ongoing efforts to have a single statewide system since the 1970's; however,

after many attempts the state decided to recognize a limited number of systems labeled for a Statewide Automated Welfare System (SAWS). In 2006, the legislature expressed a desire to reduce the number of consortia resulting first in four consortia but later reduced to three when the ISAWS consortium of small counties merged with C-IV.

Many millions of dollars were spent on the integration of the systems into C-IV and CalWIN. The costs for the operation and maintenance of the consortium systems are borne by the state and federal governments. There are discussions about merging additional consortia, and since C-IV is similar to the new LEADER replacement system (LRS), a new consortia of 40 counties could be created. The SAWS consortia are the backbone for eligibility and benefit determination, evaluation, enrollment and continuing benefits for Medi-Cal, CalWORKS, CalFresh, Employment Services/Welfare to Work (WTW), General Assistance (GA), and Foster Care. These services that were traditionally addressed in an intake lobby environment with long waits now have several technological tools that shorten wait times and allow customers more flexibility. These tools are used in county lobbies to different degrees.

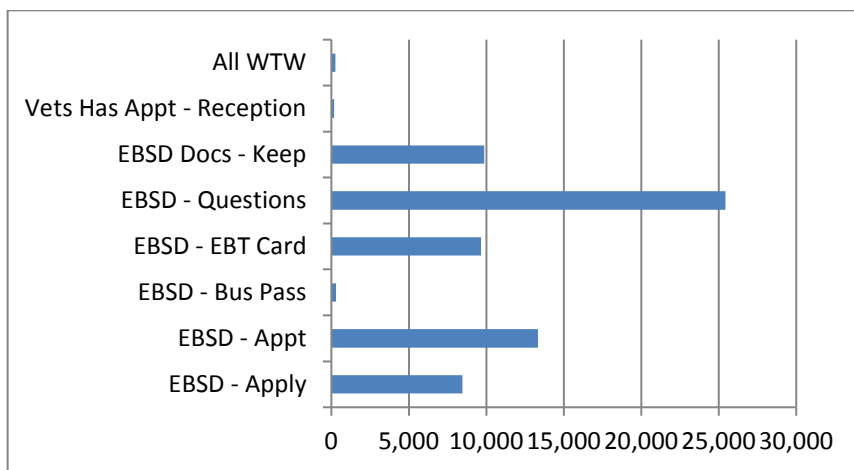
In C-IV counties, while developing the system, there was a desire for all C-IV counties to implement the same solutions with the same technology, such as a document imaging system and kiosks. This would create a standardization and easier transfer of data within the Consortium. The C-IV kiosks have the ability to upload documents, upload bar-coded documents, issue receipts, check-in for appointments and message a worker. They can also scan documents and allow customers to pick up EBT cards. The system is flexible and customer-oriented. For CalWIN counties, such as Santa Cruz and Contra Costa, each county has the ability and

responsibility to adopt different solutions. CalWIN counties have collaborated to develop joint solutions such as Benefits CalWIN; however, individual counties have pursued solutions independent of the Consortium. There are many different solutions for document imaging, assigning and tracking work tasks, and having customers check in as walk-ins or for appointments. Because of the different choices, CalWIN counties are often on their own with what to purchase and how much they should offer. Each self-service option is a separate system and therefore does not necessarily integrate or interface with CalWIN. Several organizations exist for counties to exchange information including the California Welfare Director Association (CWDA), CalWIN Director’s Committee made up of directors of CalWIN counties and the Operations and Policy Advisory Committee (OPAC). Recently at an OPAC meeting, it was discussed that CalWIN is planning to allow more interface between supportive systems and CalWIN. This will be very helpful for many CalWIN counties. Table A below is a comparison of Santa Cruz and Contra Costa County tools.

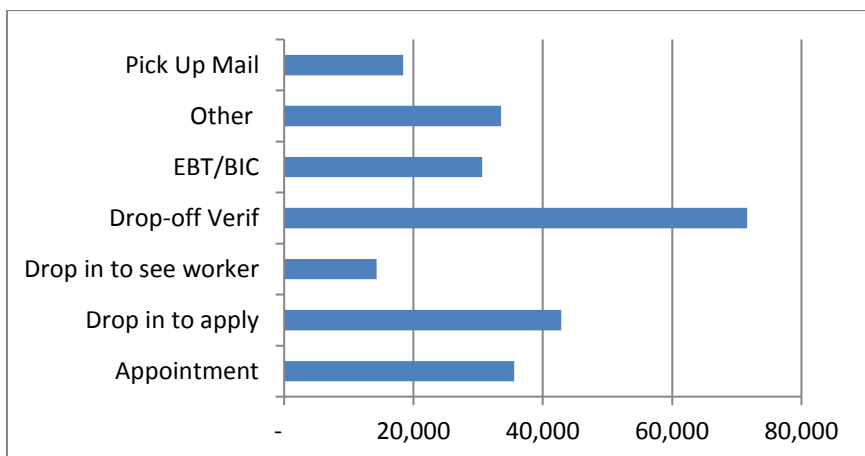
| <b>Table A</b>               |                                |                                      |
|------------------------------|--------------------------------|--------------------------------------|
| <b>Tool</b>                  | <b>Santa Cruz County – HSD</b> | <b>Contra Costa County -<br/>EHS</b> |
| <b>SAWS</b>                  | CalWIN - BCW                   | CalWin - BCW                         |
| <b>Document Imaging</b>      | Fortis                         | Northwood Compass Pilot              |
| <b>Lobby scheduler</b>       | Q-Track                        | Nemo .Q                              |
| <b>Self-Scanning Kiosk</b>   | N/A                            | Northwood Compass Pilot              |
| <b>Task assignment</b>       | Task Tracker                   | Work Distribution Tool - WDT         |
| <b>Centralized Mail Unit</b> | Yes                            | Yes                                  |

Contra Costa County is a larger county than Santa Cruz with a total of five lobby sites compared to Santa Cruz's two lobby sites. The population of Santa Cruz is approximately 270,000 people within a 607 square mile radius while Contra Costa has a population of over 1,000,000 people within 804 square mile radius. This illustrates that Bay Area counties vary in many ways.

Volume of traffic also needs to be taken into account when determining what self-service tools are necessary or warranted. Number and types of programs offered over and above departmental services must also be considered. For instance, the charts below outline the number of customers served per lobby in both Santa Cruz and Contra Costa Counties in the last year.



**Year total lobby visits – Santa Cruz County**  
**67,484**



**Year total lobby visits – Contra Costa County**  
**246,941**



## **Lobby Enhancements**

When entering a human services intake lobby, a customer's first impression often influences how he or she believes he or she is going to be served. It is important that this impression be positive as it has a direct effect on expectations and interactions with staff. A county may have superior customer service skills; however, if a customer arrives and feels the space is not welcoming or accommodating, customer service is moot. Counties must consider space planning to ensure space attributes, such as aesthetics, function/operation (business practices and flow), security, and sustainability are addressed to enhance the customers' and staff's experiences.

Santa Cruz HSD lobbies and interview rooms were recently updated as part of the *WeCare* initiative. An architect designed upgrades that include new bright flooring and accent colors that induce a calming feeling. To help with the business flow, a greeter was introduced to direct customers to the lobby ticket dispenser and answer their questions. A new receptionist's work counter was installed to allow easy access and a welcoming attribute. New lobby chairs were purchased and positioned so that customers are not staring at receptionists, which can be frustrating for both customers and staff. A kid's play area was also introduced. The space was designed to empower customers rather than invoke the feeling that HSD has power over them.

Contra Costa County has introduced many of these concepts in its lobbies and is continuing to review the lobby space. A pilot was introduced at the Hercules office in 2008 for a "Lobby of the Future." An architect was also used to design the space. Because of the recession, this model was never formally adopted at the other locations due to budget constraints. EHSD has introduced many of the concepts at the other lobbies piecemeal and recently completed an assessment by a third party at the Ellinwood and Delta Fair lobbies to determine how customers move through

the lobby, what roadblocks could be addressed, the wait times and recommendations on how this could be addressed. Also reviewed was signage and lobby chair layout. Many of the recommendations are being implemented which will enhance the customers' experiences.

### **Conclusion/Recommendations**

With the accelerated rate of change in the delivery methodology of human services, both Santa Cruz County HSD and Contra Costa County EHSD have initiated solutions to address program changes as well as the increased demand for services and the dramatic influx of new customers.

Each county has introduced solutions that make sense for their operations and demographics.

There is no right or wrong solution. One very important question is: are the two counties flexible enough in their solutions and how they deliver services to make additional changes? Most of the work analyzed as part of this case study has focused on the programs supported by

CalWIN. Two general recommendations are listed below:

- The state, consortia and counties should look at systems comprehensively for all programs, not just those included in CalWIN.
- County Costa County EHSD could combine all the different customer service models into one comprehensive and cohesive plan.

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Santa Cruz County population and size

Contra Costa County population and size

CalWIN description