

# **Technology as a Tool for Community Engagement in Santa Clara County**

**Ana Rasquiza**

## **EXECUTIVE SUMMARY**

Technology is a powerful tool available to local governments in their efforts to engage and communicate with the public. The Santa Clara County Social Service Agency's Department of Employment and Benefits Services (DEBS) has adopted several approaches to employ technology in its efforts to engage customers in social service benefits and programming. DEBS recently implemented several strategies, including text messaging customers, utilizing telephonic signatures on benefit applications, increasing the use of mobile applications to apply for and maintain benefits, and utilizing social media to better engage with families. The Marin County Health and Human Service Agency (Marin HHS) is interested in increasing local participation in CalFresh, and should explore the role technology could play in this effort. However, Marin HHS should develop a stronger understanding of the causal factors behind low local CalFresh participation before adopting new strategies to address the issue.

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## **Santa Clara County and Technology as a Tool for Engagement**

Santa Clara County leads California in the use of technology to engage families in social service benefits and programming. In recent years, DEBS has adopted a number of strategies that leverage existing technology to improve workflow and customer service. Beginning in 2012, DEBS piloted the use of text messaging for clients who receive CalFresh and CalWORKs. DEBS has recently implemented several new strategies, including text messaging more customers, utilizing telephonic signatures on benefit applications, increasing the use of mobile applications to apply for and maintain benefits, and finally utilizing social media to better engage with families. Because Marin County is already working with the C-IV Consortia to develop tools for telephonic signature, and Marin County Social Service Agency is cited by Santa Clara County as a leader in the use of social media, the focus of this report is narrowed to Santa Clara's two strategies of text messaging customers and increasing the use of mobile applications to apply for and maintain aid.

Beginning in 2012, Santa Clara County Social Services began utilizing text messaging as a tool to improve communication with customers who are applying for or working to maintain benefits.

Text messaging is used for customer reminders and to send basic information, including:

- appointment times and reminders,
- notification of missing paperwork and documentation,
- notification of changes in program status, and

- notification that the agency has received returned mail from the address on file for a customer.

This effort is supported by Santa Clara County Social Services' Information Systems team that registers staff to send text messages to customers on their caseload from their own computer via a group email account in Microsoft Outlook. DEBS management has developed and trained staff on privacy and confidentiality sensitivity when communicating with customers via text message. Confidential client information, including social security information, case number, and images of confidential images, are not included in text message communication with customers. Santa Clara County Social Services has not formally studied the effectiveness of its text messaging strategies, but Management reports that the strategy helps DEBS get into contact with customers quickly and consistently and that the strategy is very popular with customers as well as staff.

Santa Clara County Social Services also uses mobile applications to engage customers and increase access to benefits. The agency uses the CalWIN mobile app to engage and empower customers by enabling customers to access case/benefit information and submit required documentation remotely. Customers can use the CalWIN mobile application to:

- check case status and benefits,
- monitor benefit balance and transactions,
- screen for eligibility in other programs,
- apply for benefits,
- receive notices about changes in case status, and
- submit documents and required paperwork.

Particularly notable is the agency's employment of Welfare to Work participants as lobby

greeters. These are employees who have had experience utilizing similar benefits and whose positions are funded using the CalWORKs Expanded Subsidized Employment allocation.

Greeters work in each DEBS lobby, where they answer general questions coming from customers, guide customers to the appropriate staff person, and offer guidance on the use of the CalWIN mobile app.

Santa Clara County Social Services has not formally studied the effectiveness of the web application strategies, but Management reports that the approach has contributed to the reduced lobby traffic and reduced customer return to aid in recent years. The agency also reports that increased focus on the CalWIN mobile app has reduced the need for customers to call their worker and schedule in-person appointments in order to access basic case/benefit information. Finally, DEBS Management report that the strategy is popular with customers as well as staff.

DEBS Management has observed some challenges with the new strategies of using text messaging and the CalWIN mobile application to engage customers. One key challenge with text messaging is that not all customers prefer communicating via text message, and some wish to avoid fees associated with the use of text messaging. Santa Clara County Social Services has addressed this challenge by writing policy and procedures that guide staff to ask customers if they are comfortable receiving text messages. When a customer expresses that they prefer to avoid communication via text message, Santa Clara Social Service Agency uses its case management database to record the customer's mobile phone number as a landline phone number.

DEBS Management also has experienced some challenges while using the CalWIN mobile application to engage customers. Management reports that customer awareness of the tool has

been a challenge. DEBS has addressed this challenge by adopting a variety of outreach strategies to familiarize customers with the CalWIN mobile application, including promoting the tool on social media, on screens in the lobby, and within the community. The “Greeter” team also plays an important role in outreach about the CalWIN mobile application. Management notes that this outreach is an ongoing effort.

### **Technology as a Tool for Engagement in Marin HHS**

Marin County is currently focused on boosting established strategies and developing new strategies to increase CalFresh participation. CalFresh participation and food security are issues that have received increased attention with the development of Marin County HHS’s first strategic plan. Today, Marin County is ranked 55 out of 58 California counties on the California Food Policy Advocates’ CalFresh Program Access Index which measures CalFresh utilization in California by county.<sup>i</sup> Meanwhile, research shows that Marin County residents would receive an additional \$22,100,000 in federal benefits each year if everyone who is eligible for CalFresh were participating. Multiplier effect research suggests that these increased benefits would serve as supports to the local economy, resulting in \$39,600,000 of additional annual state and local economic activity.<sup>ii</sup>

Today, Marin County HHS has begun to pursue the use of text messaging and mobile apps to engage families in social service benefits and programming, particularly with CalFresh engagement. Marin Public Assistance and Employment and Training staff has the ability to use Microsoft Outlook to communicate with customers via text message. However, there are no current policies and procedures guiding staff on the appropriate use of text messaging, and the strategy is not utilized systemically. Currently, the HHS Compliance Unit is working to draft

basic guidelines around how to use text messaging with customers while maintaining customer privacy and information security.

Marin County HHS has already developed strategies to use mobile applications to increase engagement in CalFresh. C4Yourself is a mobile application developed by the C-IV consortium that is free and available to both current customers and members of the public who are interested in applying for benefits. Currently, use of C4Yourself is limited, with only 1,390 new CalFresh applications submitted through C4Yourself in 2016,<sup>iii</sup> and about one quarter of applications submitted online in recent months.<sup>iv</sup> Marin County has also worked with Code For America to develop GetCalFresh, a mobile-friendly website service that enables the public to apply for CalFresh quickly and maintain benefits easily from their smart phones. Information about the GetCalFresh tool is available on the Marin County HHS website and on the Code For America website, but use of the GetCalFresh tool has been limited since it launched.

### **Recommendations**

Marin County HHS is interested in increasing local participation in CalFresh. It should explore the role that technology could play in this effort. However, Marin County HHS should develop a stronger understanding of the causal factors behind low CalFresh participation in the county before adopting new strategies to address the issue. Recommendations are outlined below:

1. **Marin County HHS should develop a stronger understanding of the causal factors behind low local CalFresh participation before adopting new strategies to address the issue.** This work should be integrated into the current efforts involved with writing Marin County HHS's first strategic plan, which is expected to be completed in the coming year. Food insecurity is one of the key issues rising up in the strategic planning process. Marin County HHS should consider engagement and technology as one of the

many possible drivers of food insecurity as the agency reviews available data and works with partners in the community to develop a strategic approach to the issue of food insecurity.

2. **Marin County HHS should continue to consider technology as a tool to engage the customers and families it serves,** particularly given research that suggests low-income individuals and families are increasingly “smartphone dependent, relying on their smartphones to access the internet.”<sup>v</sup> Research by Code for America suggests that the existing application process serves as a barrier to services for many customers: the traditional CalFresh application asks customers over 100 questions, many which do not pertain to their individual circumstances, and 62% of people who begin a CalFresh application do not finish.<sup>vi</sup>
3. **Marin County HHS should write policy and procedure for staff regarding the use of text messaging with customers.** Currently, the HHS Compliance Unit is working to draft basic guidelines around how to use text messaging with customers while still maintaining customer privacy and information security. This effort should be continued given that some staff is already using text messaging as a tool to engage customers.
4. **Marin County HHS should leverage and build on previous and existing efforts to engage customers and increase CalFresh participation.** Marin County HHS has already invested time and energy piloting Code for America’s GetCalFresh tool, and an internal CalFresh outreach workgroup is currently working with the California Department of Social Services to develop geomaps that can support strategic approaches to CalFresh outreach within the county. Rather than starting from scratch with new

strategies, Marin HHS should consider the ways that forthcoming efforts can build on work that has already been done.

5. **Marin County HHS should continue to develop strong partnerships in the effort to engage customers and increase CalFresh participation.** As the agency moves toward a collective impact approach to community health, relationships with the San Francisco Marin Food Bank, County Human Resources, Code for America, the California Department of Social Services, local Community-Based Organizations and surrounding counties, are more important than ever.
6. **Marin County HHS should consider using Greeters in the lobby of its main Public Assistance office** if mobile applications are identified as a strategy to address one of the key drivers of Marin County's low CalFresh participation. Employing Greeters could be a particularly compelling strategy for outreach around mobile applications, given that Marin County HHS's current internal strategic plan includes increasing the number of employees with "lived experiences" as a goal. These positions could be funded using the CDSS CalWORKs Expanded Subsidized Employment (ESE) funding allocation for Greeter wages, as well as to cover expenses associated with increased time for supervision of the new staff.

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<sup>i</sup> "Measuring CalFresh Utilization By County (2014)." California Food Policy Advocates, 2014. <http://cfpa.net/program-access-index-pai-2016> 14 April 2017.

<sup>ii</sup> "New Analysis: increased CalFresh Participation Would Bring \$22,100,000 in Federal Nutrition Benefits to Marin County." California Food Policy Advocates, 2016. <http://cfpa.net/CalFresh/Media/PAI-LDEP-PressRelease-Marin-2016.pdf> 6 April 2017

<sup>iii</sup> "Marin C4Yourself Dashboard." County of Marin Department of Social Services, 2017. 17 April 2017

<sup>iv</sup> "Marin CF 296." California Department of Social Services, 2016

<sup>v</sup> "Record shares of Americans now own smartphones, have home broadband." Pew Research Center, 2017. <http://www.pewresearch.org/fact-tank/2017/01/12/evolution-of-technology/> 12 April 2017

<sup>vi</sup> "Healthy Communities." Code for America, 2016. <https://www.codeforamerica.org/focus-areas/healthy-communities> 22 March 2017