

# Video Conferencing: Another Tool for Enhancing Client Access and Services

MADELYN BROWN

## EXECUTIVE SUMMARY

Santa Clara County Social Services Agency (SSA) is continuously utilizing innovative technologies to enhance services to clients. Given that smartphones are highly accessible, SSA is increasing the ways clients can access benefits and services using their devices. SSA can further increase the public's access to services and enhance the client experience by adding video conferencing as a tool to its repertoire of multiple modes of access and communication. Contra Costa County Employment & Human Services Department (EHS) has begun piloting and implementing video conferencing as an innovative technique for interviewing clients. By adapting

Contra Costa County's use of video conferencing via Skype to clients, SSA can add additional modes of communication in relation to client preference and accommodations. Additionally, implementing video conferencing to other areas of the agency can prove to be beneficial in increasing presence throughout the community or potentially supplementing client visits. Offering more means of access to clients can further enhance Santa Clara's already impressive and diverse use of technologies leading to decreased foot traffic, higher retention rates, shorter processing times, and moving clients closer to self-sufficiency and fulfilling lives.

---

**Madelyn Brown**, Management Analyst, Santa Clara County Social Services Agency



# Video Conferencing: Another Tool for Enhancing Client Access and Services

MADELYN BROWN

## Introduction

Santa Clara County is at the heart of Silicon Valley and as one might expect, Santa Clara County Social Services Agency (SSA) is continuously utilizing new and innovative technologies to enhance services to clients. The landscape of Santa Clara County is wide spread and encompasses 1,312 square miles ranging from Palo Alto to Gilroy, requiring technology that is moving and mobile to reach clients. Presently, 77% of adult Americans now own a smart phone, with lower-income adults and those 50 years and older showing the greatest increase in ownership within the past two years.<sup>1</sup> Given that smartphones are highly accessible, SSA is increasing the ways clients can access benefits and services using their devices. For example, the Department of Employment and Benefit Services (DEBS) has implemented incredible tools to achieve this goal such as: Mobile App BCW, Telephonic Signature, Texting, and Social Media outreach. Since implementing these tools, Santa Clara has decreased churn rates (loss of benefits for eligible clients) from 5.7% to 2.2%, well below the current statewide average of 14.3%.<sup>2</sup> DEBS has also significantly decreased foot traffic and office visits in continuing offices by 74% from 2015 to 2017. These achievements have increased access to services and enabled clients to receive the benefits they need, all in a more convenient and efficient manner, moving clients closer to self-sufficiency.

Santa Clara County should continue to seek innovative ways to keep up with the technology that the community is growing increasingly reliant upon. SSA can increase the public's access to services and/or enhance the client experience by adding video conferencing as a tool to its repertoire of multiple modes of access and communication. Skype for Business is currently being deployed throughout Santa Clara County as the Information Services Department (ISD) rolls out Microsoft Windows 10 with Skype for Business already included in the suite. This will allow for secure one-on-one conferencing between staff and clients. By adding a visual component of a home-to-office interview appointment, clients can indicate their learning and communication preferences and, if the necessary tools are available, may decrease the need to come into an office for a meeting. With the addition of a face-to-face experience, clients can see their eligibility worker, have the ability to view the forms on screen, as well as have a more authentic experience with their eligibility or social worker from home that simulates an in-person interaction.

Contra Costa County Employment & Human Services Department (EHS) has begun piloting and implementing video conferencing as an innovative technique for interviewing clients. The initial pilot began with interviewing clients within the same office and moved into interviewing clients from across the county regions, with the current end-goal of interviewing clients from home via the free Skype mobile app. The pilot has been incredibly successful, with an average client approval rating of 97%. Staff are also appreciative as video conferencing has

1. Mobile Fact Sheet. (2018, February 05). Retrieved from <http://www.pewinternet.org/fact-sheet/mobile/>

2. Data Portal. (2018, March 30). Retrieved from <http://www.cdss.ca.gov/inforesources/Data-Portal/Research-and-Data/CalFresh-Data-Dashboard>

balanced caseloads, boosted morale, increased efficiency, reduced interview times, and increased staff involvement by being included in the process.

### **Video Conferencing & Bridging the Gap between Technology and Face-to-Face Interactions**

Video conference can be a powerful tool in bridging the gap between using the efficiency of technology to reach clients anywhere at any time, and still having a more authentic human interaction. Eye contact is such an important experience in human interactions that research has shown it requires more mental focus.<sup>3</sup> It is also shown that people tend to assume more sincerity from someone who makes eye contact and are more likely to believe statements made by a person who looks another in the eye. Research shows that face-to-face communication, specifically dialog, shows neurological synchronization suggesting more successful communication.<sup>4</sup>

In business practices, counties are continually looking for ways to improve efficiencies and convenience of services. However, the quality of service and the client understanding of the benefits being received are equally as important. Through body language and facial expressions, it is often easier to express the gravity of the statements the client is agreeing too. With English now commonly being a second language for clients as well as staff, the ability to read lips or use hand gestures can improve communication. Moreover, Civil Rights policies require a form of communication in American Sign Language interpretation; video conferencing could become a potential alternative to Telephonic Signature for these purposes. Video conferencing allows the same convenience as Telephonic Signature with different technological accommodations.<sup>5</sup>

### **Contra Costa County Video Conference Background**

In 2014, the Contra Costa County IT group used venture capital funds to invest in video conferencing equipment to further utilize the Skype for Business application included in the Microsoft suite. The IT group invited the department programs to collaborate on how to utilize this technology to enhance services to the community. The CalWORKS program, led by EHS Division Manager, Natasha Paddock, volunteered to use the video conferencing tools to create a pilot project for redetermination appointments with clients.

At this time, Contra Costa County was facing a budget crisis and was unable to increase staffing figures to meet the needs of their client base. CalWORKS was experiencing unbalanced caseloads with 60% of caseloads residing in the East County offices (Antioch and Richmond) and 40% of caseloads spread among the West County offices (Hercules) and Central County offices (Pleasant Hill), causing low morale among staff. Video conferencing interviews with clients, opposed to in-person office visits, was the creative solution to both their case balancing and staffing needs.

Prior to acquiring approval for the Video Conferencing Pilot Project, the team needed to first determine if any policies or mandates prevented video conference use for interviews. In 2013, with the release of All County Information Notice (ACIN) I-60-13 by The California Department of Social Services (CDSS), in-person visits to obtain original signatures were no longer required to enroll clients to receive or continue to receive benefits. This allowed counties to develop innovative business processes for acquiring electronic signatures rather than physical signatures. The team also discovered that they could do away with other outdated processes, such as an hour-long video, that was presented to clients prior to in-person interviews. Once the team had demonstrated to agency executives that video conferencing was in line with state policies and mandates, they were clear to start the pilot.

3. The Psychology of Eye Contact, Digested. (2017, January 04). Retrieved from <https://digest.bps.org.uk/2016/11/28/the-psychology-of-eye-contact-digested/>

4. Jiang, J., Dai, B., Peng, D., Zhu, C., Liu, L., & Lu, C. (2012, November 07). Neural synchronization during face-to-face communication. Retrieved from <https://www.ncbi.nlm.nih.gov/pubmed/23136442>

5. Paddock, N. (2018, April 20). Video Conferencing and Santa Clara [Contra Costa E-mail interview]



## Video Conferencing Pilot

### PHASE 1—TESTING THE THEORY

“Phase 1” of the pilot project was implemented in July 2016, starting with a unit from the Richmond office. A Video Conference Room was created by converting an underutilized client-dedicated Benefits CalWin (BCW) room off the lobby. The team began to use this room to conduct video conference interviews between clients and Eligibility Workers (EW's) within the same office. This allowed the team to test the technology and equipment, as well as adjust business processes as needed, without the concern of preventing clients from being able to get the benefits and services they needed.

Individual video conference stations were created for the clients and equipped with noise cancelling headphones and monitor privacy screens to ensure client confidentiality. Clerical staff are stationed inside the room to help clients get set up on the video conference and assist with any troubleshooting or questions. Skype is used to conduct the video conference and the Compass document management application is used to collect the required signatures by pushing the form to the client via touch screen monitors. Once the technology and business processes of Phase 1 were solid, the team could move on to additional units in different office locations.

## Video Conferencing Pilot

### PHASE 2—TAKING VIDEO CONFERENCING ACROSS COUNTY OFFICES

“Phase 2” of the pilot began with implementing a video conference room in the Antioch office with the largest client population. The purpose of Phase 2 was to implement video conferencing interviews from one regional office to another. With the addition of a second video conference room, staff from West and Central County offices could now schedule video conference interviews with clients in the East County offices and vice versa. This made it possible to assign staff from low-impacted offices to clients in areas of higher client populations in order to balance the caseloads.

The third and fourth offices to implement the video conference rooms were in Hercules and Pleasant Hill. Pleasant Hill has the most ideal model out of the four offices with five video conference stations, located right off the lobby in an easily accessible room, a clerical station as well as a table in the middle of the room for children to color while parents complete the interview. Tall cubicle partitions are used to separate each video conference station to create more privacy.

The team used peer shadowing to transition the video conferencing pilot to all units in the department. Staff from units included in the pilot were heavily involved with developing the business processes, creating the video conference program, and taking ownership of its success. These units were tasked with training their peers who were eager to see how it worked, ask questions, and gain confidence from the units already using it. By September 2017, all units were reallocated to the East County offices with higher client population and interviews with the Hercules and Pleasant Hill population were done entirely by video conferencing.

## Video Conferencing Pilot

### PHASE 3 – THE ULTIMATE GOAL, SKYPE TO CLIENTS AT HOME

With the success of the first and second phase, the team received approval from Executives to push for “Phase 3.” The ultimate goal for the video conference pilot is to use Skype to conduct interviews with clients at home using their smart phone devices. This would further increase time efficiency, reduce foot traffic, and decrease hardship for the clients, bringing them closer to self-sufficiency and a better quality of life for their families.

The team is currently working with IT on a variety of elements to bring the third phase to life. First, the security parameters of using Skype with clients to a personal smart phone that is outside the county network. Second, the ability to capture the critical electronic signature through the client smart phone. Currently, EHS CalWORKS uses Compass

to receive electronic signature on required forms. Understanding how to push these forms to the clients through the Skype application on a mobile phone is more complex than on the touch screen PC monitor, and the team is working with IT for the best solution.

### **Contra Costa County Video Conferencing Key Findings**

Throughout the first two phases, the team collected over one thousand physical surveys from clients after each re-determination appointment. The questionnaire surveyed clients on a number of feedback topics, such as 1) preference of video conference vs. driving to an office location (on average 87% prefer video conference); 2) ease of process (on average 97% said the process was easy); 3) comparing video conference to in-person appointments (on average 66% rated video conferencing as better); 4) overall experience (on average 97% approval); and 5) interest of using video conferencing from home (on average 77% of clients would be interested).<sup>6</sup> In speaking with clients, the eligibility staff collected first-hand reaction from clients, “I’ve received a lot of positive feedback [from clients] since we’ve been doing this [video conferencing] for a few years; on how quick it is and how easy it is. And they are looking forward to moving to the next phase which would be doing Skype from a remote location.”<sup>7</sup>

The average re-determination appointment times have been reduced from 45-90 minutes to 35-45 minutes, creating lighter workloads on staff and quicker benefits for clients. Staff have also found increased time efficiencies in completing the interview, including less paperwork, and receiving required signatures all at one time. Staff morale has been boosted from the overall reduction in workload, as well as the balance of caseloads among the four office locations.

6. Amog, L. (2018, February 21). Video Conference Report and Survey [Contra Costa E-mail interview].

7. Richmond Eligibility Staff Interview [Personal interview]. (2018, February 23).

### **Conclusion and Recommendations for Santa Clara County**

Santa Clara County should continue to utilize technology to improve methods of communication, services, and outreach to clients. Adapting Contra Costa County’s use of video conferencing via Skype to DEBS clients can add additional modes of communication in relation to client preference and accommodations. Offering more means of access to clients can further enhance Santa Clara County’s already impressive and diverse use of technologies leading to decreased foot traffic, higher retention rates, and shorter processing times. Additionally, implementing video conferencing to other areas of the agency can prove to be beneficial in increasing presence throughout the community or potentially supplementing client visits in Department of Family and Children Services (DFCS) as well as the Department of Aging and Adult Services (DAAS). Recommendations are outlined below:

#### **1. TECHNOLOGY EQUIPMENT AND APPLICATION NEEDS:**

As Skype for Business is deployed throughout the county, it can allow for secure one-on-one conferencing between staff and clients. With the proper account credentials, Skype for business can also facilitate one-to-many conferencing. In many cases, Santa Clara County is transitioning to laptops for mobility purposes, which have built-in webcams. All SSA conference room TV’s are now being equipped with webcams to allow for video conferencing. However, for PC users, webcams would need to be purchased through county contract for roughly \$20 per unit and noise-cancelling headsets can be purchased for roughly \$30 per unit.

#### **2. TECHNOLOGY INTEGRATION:**

Capturing the client signature during a redetermination appointment is a crucial piece of the interview process that would need further exploration. Currently, Contra Costa County is still in the development of determining the capabilities of receiving

a signature through Skype on a smartphone. In Santa Clara County, current policy requires that certain forms (e.g. Rights and Responsibilities) be completed at the time of an interview due to the requirement that the document must be reviewed with the client by the Eligibility Worker. Two possible approaches of capturing an electronic signature during a Skype interview would be using DocuSign or Telephonic Signature.<sup>8</sup>

DocuSign is an electronic signature technology currently used at Santa Clara County; however, it would require sending an email with the documents for signature. This may not be the best approach as it would require the client to exit from the Skype mobile app and complete the signature via email. For efficiency and ease of use for the client, the best option would be to incorporate Telephonic Signature technology to capture the verbal consent of the client. However, this would involve complex programming to develop a system that records the audio without capturing the video portion of the interview. Due to the complexity, time and collaboration with IT and program staff would be required to understand the signature capabilities and come up with solutions that make sense for eligibility staff and clients. However, there is also the possibility of exploring alternative electronic signature technologies that may be compatible with Skype. As Contra Costa County continues to explore such options, it would be in the best interest of both counties to share information on their findings for a compatible electronic signature option.

### 3. PILOTING & PHASING:

For DEBS appointments, an effective first step would be to provide a survey to clients regarding learning styles, communication preferences, and receptiveness to Skype appointments. The next step would be to mimic Contra Costa's "Phase 2" in

setting up a video conferencing room to use skype from one location to another. This would allow for staff and clients to begin getting comfortable with using video conferencing as an interview method. It would also allow for fine-tuning of any procedural issues or technical bugs that may happen without risk of a client not being able to complete the interview and receive benefits. It would be best to use this method for a practical use such as video conferencing from one regional office to another. Using an initial phase for up to a year, prior to moving to a Skype-from-home model, will also allow Santa Clara time to receive feedback from clients and staff on the pros and cons of this method.

For example, Staff Development is planned to move from the Senter Road campus to the Julian Campus—away from the primary DEBS office locations. Eligibility trainees could potentially use the video conferencing tool to conduct interviews with clients from the Julian Campus to the Senter Road campus. If any technical glitches arise, DEBS staff on Senter Road would be able to assist the client. At the same time, this would provide a practical solution for trainees that need to complete appointments with clients that are accustomed to the Senter Road location.

### 4. OTHER AGENCY-WIDE USES FOR CLIENT

#### ENGAGEMENT USING VIDEO CONFERENCING

Outside of DEBS clients, the agency as a whole could benefit from innovative ways of utilizing video conferencing to engage with clients and the community. For DFCS clients, using video conferencing for supplemental child visits, in addition to the required in-person visits, could aid in the reunification of families. Another use of video conferencing for DFCS is in the form of Child and Family Team (CFT) meetings that have now replaced the Team Decision Making (TDM) meeting model. The CFT model is a team-based approach that allows for enhanced engagement with families and an inclusive commitment and accountability from the

8. Saini, D., Tran, V., Van Den Akker, T. (2018, April 19). Web Conferences with Clients [Santa Clara E-mail interview]

child's complete circle of support.<sup>9</sup> Coordinating such meetings can be difficult and oftentimes, some individuals may need to call in on a conference line. However, it is important that all individuals are involved in decision-making and following along in a meeting is challenging with audio only.<sup>10</sup> These meetings could be drastically improved by not only increasing participant's ability to attend, but also increasing the quality of their participation.

---

9. DFCS Memorandum #18-DZ01 (2018, February 13). Child and Family Team Meetings [Santa Clara County Social Services Agency Announcements]

10. Arreola, G. (2018, April 16). Video Conferencing Tool and DFCS [Personal Interview].

## Acknowledgements

I would like to acknowledge the team members at Contra Costa County EHS whom took the time to share their experience and insight with me. A special thank you goes to Natasha Paddock and Lloyd Amog for their patient guidance and sharing of their innovative efforts in improving services and ultimately the lives of the community we serve. I would also like to thank the staff at SSA that took time to meet with me to further my understanding as well as the Executive Team for investing in my education and development. A special thank you goes to Elizabeth Lipira and Steve Fondacaro for their support and encouragement.