

# County of Santa Clara

Social Services Agency

353 West Julian Street  
San Jose, California 95110-2335



DATE: May 13, 2021

TO: Board of Supervisors  
Jeffrey V. Smith, M.D., J.D., County Executive

FROM: Robert Menicocci, Agency Director *RM*

SUBJECT: **SSA Off-Agenda Report Regarding CalFRESH Food Enrollment**

At the April 20, 2021 Board of Supervisors meeting, Supervisor Chavez directed the Social Services Agency to:

1. Provide the CalFresh Food Assistance Program enrollment and re-enrollment forms to all Board members, including information clarifying the steps to re-enroll.
2. Collaborate with partner organizations, such as those providing housing and food access during the COVID-19 pandemic, including the Healthier Kids Foundation and Santa Clara Family Health Plan, to determine best practices and available resources to facilitate CalFresh enrollment, including telephone outreach and form-filling assistance; and
3. Report to the Board on date uncertain clarifying CalFresh enrollment goals and efforts to achieve success Countywide.

**SSA has Established a Multi-Channel Enrollment Process with the Goal of Increasing Community Access to Benefits**

Board of Supervisors: Mike Wasserman, Cindy Chavez, Otto Lee, Susan Ellenberg, S. Joseph Simitian  
County Executive: Jeffrey V. Smith

## *Applying for CalFresh Food*

SSA-DEBS has developed and implemented a strategic effort to expand access to benefit programs for all members of the community. As a result, community members have five different channels to apply for CalFresh Food: online, by phone, by fax, by mail, and in person at district offices. Providing five different channels for CalFresh Food applications allows the SSA-DEBS to meet community members where they are and remove barriers to the application process.

The table below shows data from pre-COVID March 2019 – Feb 2020 and during COVID March 2020 – March 2021 on the channels used by Santa Clara County community members to submit CalFresh Food applications.

Table 1. Channels used to submit CalFresh Applications

<b>Application Source</b>	<b>Percentage March 2020 - March 2021</b>	<b>Percentage March 2019 - Feb 2020</b>
Total number of applications	<u>N</u> = 62,337	<u>N</u> =52,070
Online/ electronic	82%	43%
Phone	9%	0.3%
In Person	4%	51%
Mail	2%	1%
Fax	0%	0%
Other*	3%	5%

*\*Other includes outstation sites such as Hospitals/Clinics, AB720 Jail/Prison Sites, AB109 Reentry Resource Center, Juvenile Probation, etc.*

There are two websites to submit a CalFresh application electronically:

- [www.mybenefitscalwin.org](http://www.mybenefitscalwin.org)
- [www.getcalfresh.org](http://www.getcalfresh.org)

The online electronic application offers a guided process and FAQs to support the individual in completing the application.

For phone applications, applicants call 408-758-3800 and speak with a clerical worker who takes the application information over the phone, and the individual signs the application via telephonic signature.

The least common method, as shown in Table 1, is for a hard copy application to be mailed to the SSA-DEBS office or dropped off in person to an SSA-DEBS office. See Attachment A for the CalFresh Food application. See Attachment B for the SSA's 'Ways to Apply' flyer.

Figure 1: CalFresh Food Application Process

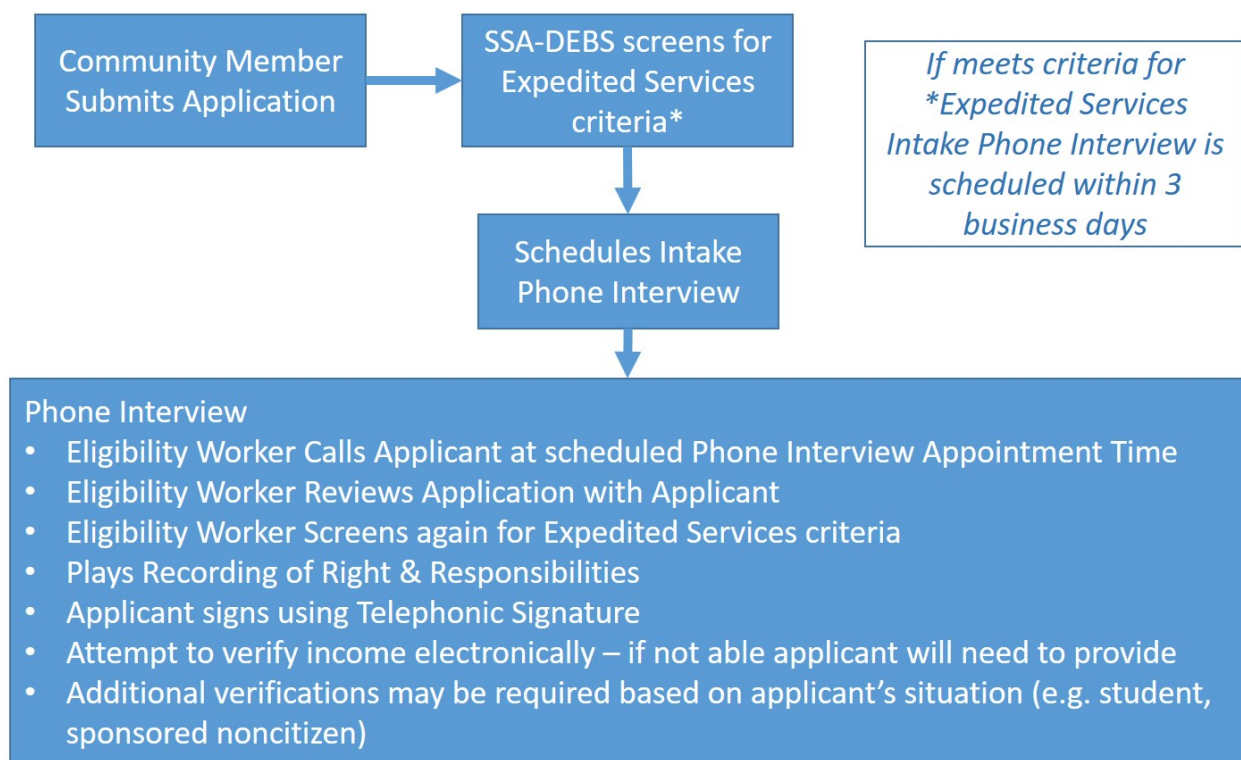


Figure 1 provides an overview of the CalFresh application process. Mainly, the steps are as follows. Once community members submit their CalFresh Food application, an intake interview is required. To begin the intake process, the SSA-DEBS screens all applications for Expedited Services Program eligibility criteria, then schedules a telephone interview with the applicant, prioritizing those that

appear to qualify for the Expedited Services Program for a telephone interview within 3 business days.

Then, an Eligibility Worker (EW) calls the applicant on the day of the interview. The EW informs the applicant that the call is being recorded, provides a brief overview of the process, and conducts the intake interview (reviews the application with the applicant). EWs also screen again for Expedited Services if what the applicant reports during their interview makes them potentially eligible for Expedited Services, and it was not obvious based on what was reported in the application during the initial application review.

The EW plays a recording of CalFresh Food's Rights and Responsibilities for the applicant, and the applicant has the opportunity to ask any clarifying questions and receive answers. The applicant then certifies under penalty of perjury that they understand their Rights and Responsibilities and state their name and date as their telephonic signature for any required forms that require signature. In order to be approved for CalFresh Food, the eligibility process requires proof of income. EWs first attempt to verify income electronically; if that is not possible, the applicant is asked to provide income documentation. Additional verifications may be required based on the client's situation (e.g., student, sponsored noncitizen).

### *Recertifying for CalFresh Food*

CalFresh households must "recertify" their eligibility in order to keep continuously receiving CalFresh benefits. To do this, they must complete recertification before the 15th of the month when their certification period will end. [MPP § 63-504.61; 7 C.F.R. § 273.14(a); ACL 13-18]. In California, most households have a 12-month certification period. Some household with elderly or disabled members have a 24-month certification period. Households that only have elderly and/or disabled members and no earned income are certified for 36 months.

In 2014, the SSA-DEBS implemented the Telephonic Signature (TS) process, which eliminated the requirement for clients to submit a paper form recertification.

The recertification process is very similar to the application process. First, the eligibility worker (EW) reviews current case information and sends an "Appointment Notice" to the client with a scheduled recertification telephone

interview appointment along with the CalFresh Food recertification form. The notice is sent out at least 10 days prior to the scheduled interview.

On the date and time of the scheduled interview, the EW calls the client to conduct the telephone interview. The EW informs the recipient the call is being recorded, provides a brief overview of the process, conducts the recertification interview, then updates the system of record (CalWIN) with the new information.

The EW then plays a recording of the Rights and Responsibilities for the client. The client asks any clarifying questions and receives answers, and then certifies under penalty of perjury that they understand the CalFresh Food Rights and Responsibilities. The client states their name and date as their telephonic signature for any required forms that require signature.

Once the case is recertified and authorized by the EW, the Notification of Completed Yearly Review letter, completed recertification form (i.e., Statement of Facts), and Informational Packet is sent to the client. Just as with the application process, recertification requires proof of income. EWs first attempt to verify income electronically; if that is not possible, the recipient is asked to provide income documentation. Additional verifications may be required based on client's situation (e.g., student, sponsored noncitizen). See Attachment C for the CalFresh Food recertification form.

## **Collaboration with Partner Organizations**

On an ongoing basis the SSA-DEBS collaborates with numerous partner organizations throughout the County to facilitate enrollment in CalFresh Food as referenced in Legislative File 105420 presented to the Board on April 20, 2021.

Notably in the area of food and housing during the pandemic:

The SSA-DEBS and Second Harvest of Silicon Valley (SHSV) continued our long-standing partnership via an active MOU to provide food assistance to low-income families, conduct outreach activities, and provide support to partnering organizations.

SHSV supports by:

- Assisting with CalFresh application completion and submission.

- Collaborating with SSA-DEBS in presentations to educate the public and other community partners on food assistance (e.g., CalFresh, food banks).
- Developing and promoting Social media campaigns related to food assistance.
- Distributing marketing material, through presentations, ‘Promotoras’ (community workers), at food distribution sites.

A new partnership emerged with the County’s Office of Supportive Housing (OSH). During the pandemic, the SSA-DEBS provided OSH with CalFresh Food, General Assistance, and CalWORKs applications in English, Spanish, and Vietnamese. Included with the applications were pre-stamped, pre-addressed envelopes for easy return to the SSA-DEBS office. OSH distributed these applications at two Isolation & Quarantine sites, Gateway Pavilion Shelter for single adults and Family Motel Program for families.

With regard to Medi-Cal outreach collaborations with Healthier Kids Foundation and Santa Clara Family Health Plan (SCFHP):

SSA-DEBS has been partnering with Healthier Kids Foundation via a MOU since 2017 to expand the Baby Gateway Program, a program for mothers enrolled in Medi-Cal to improve health, safety, and well-being of infants from the point of birth. SSA-DEBS has been collaborating with SCFHP for several years to help Medi-Cal beneficiaries retain coverage. SCFHP assists clients in maintaining current contact information with SSA-DEBS and submitting recertification information timely.

CalFresh outreach is not currently conducted through these collaborations but could potentially be explored through expansion of MOU contracts. The new state requirement AB79 requires counties to designate a county liaison to establish and facilitate outreach communications, activities, and processes with CBOs that do Medi-Cal enrollment to also do CalFresh application referrals by January 2022. This county liaison position will require additional staffing to fulfill the new state requirement (more details in the CalFresh enrollment goals section).

With regard to best practices, we have seen the following themes arise from our efforts:

- Partnerships to ensure the timely exchange of information to keep SSA-DEBS case files current and updated,
- Leveraging the trust of community partners,
- Marketing and consistent messaging from SSA-DEBS in partnership with trusted sources,
- Meeting clients where they are and using communication channels that are comfortable and trusted for them.

## **CalFresh Food Enrollment Goals and Efforts to Achieve Success Countywide**

### *Goal # 1: National SNAP Participation Rate Goal: 80-90%*

California's name for the national Supplemental Nutrition Assistance Program (SNAP) is CalFresh. The last published national SNAP participation rate in 2017 was 84%. The participation rate is a metric for the numbers of those enrolled in SNAP as a percentage of those estimated eligible. In 2018, the last year the California Department of Social Services (CDSS) published participation rate data for the State and California counties, the State overall had a CalFresh participation rate of 71% and Santa Clara County of 49%. The state of California has lagged nationally in its SNAP participation rate and has had a continual goal to achieve a participation rate closer to the average national rate ranging in the 80-90%. Santa Clara County ultimately strives for the same goal - to reach 80-90% CalFresh participation rate.

The flaw with this metric is that it is calculated retroactively, published in a 2–3-year lag, and based on census information *estimating* the eligible population on very basic criteria. The actual numbers of the eligible population will fluctuate with economic cycles.

The SNAP/CalFresh participation rate is a valuable metric to track the trajectory of the participation rate for the County but is limited in terms of its usefulness as a goal setting and measurement metric to impact real time decision making for outreach and enrollment efforts.

In order to achieve the goal of an 80-90% CalFresh Food Participation Rate a locally measurable and achievable metric needs to be established for incremental goal setting and real time decision making in activities that impact the participation

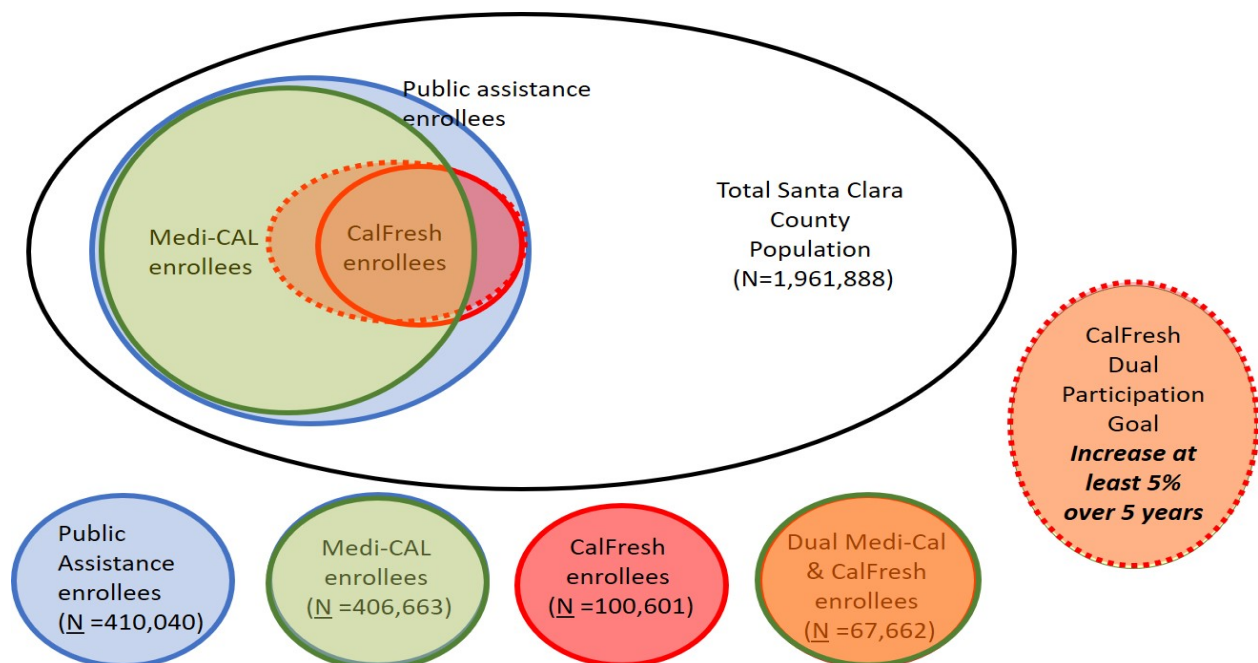
rate. For this purpose, SSA-DEBS intends to establish and track the following goals and make necessary adjustments to the goals as needed along the way:

- Increase Dual Participation in Medi-Cal and CalFresh by at least 5% over 5 years
- Increase Overall Numbers Enrolled in CalFresh as a percentage of those enrolled in Public Assistance by at least 4% over the next 5 years
- Maintain or improve churn rate of 1% at 30 days and 7.3% at 90 days

*Goal # 2: Increase Dual Participation in Medi-Cal and CalFresh by at least 5% over 5 years*

A consistent trend for at least the last 10 years is that over 99% of Public Assistance clients are enrolled in Medi-Cal –today this equates to 406,663 individuals in the County. Today, 67,662 Public Assistance participants, or approximately 17%, are enrolled in both Medi-Cal and CalFresh Food programs. The remaining 339,001, or 83% are not enrolled in CalFresh. Many of the individuals who are eligible for Medi-Cal are also likely eligible for CalFresh Food. The goal is to increase dual participation in both Medi-Cal and CalFresh from 17% to at least 22% of Public Assistance participants over the next 5 years.

Figure 2. Increase Dual Participation in Medi-Cal and CalFresh Goal

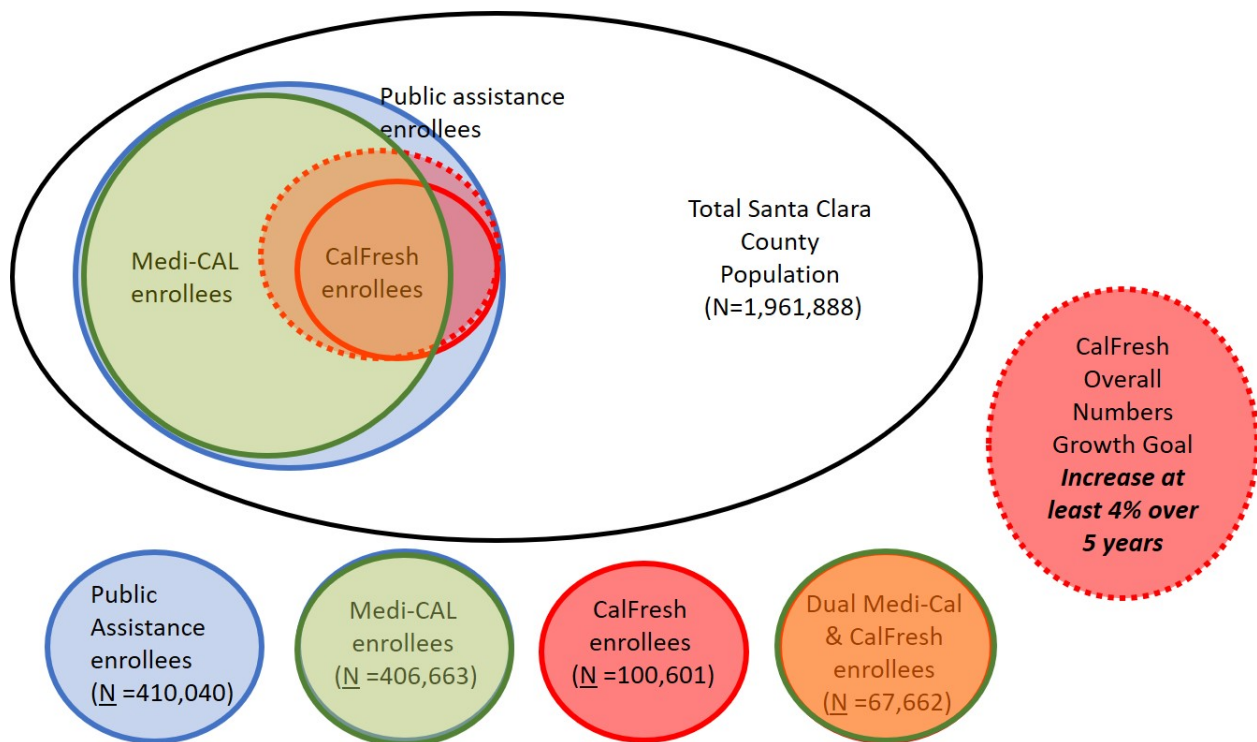




*Goal # 3: Increase Overall Numbers Enrolled in CalFresh as a percentage of those enrolled in Public Assistance by at least 4% over the next 5 years*

Currently approximately 25% of public assistance clients are enrolled in CalFresh Food, or 100,601 individuals are enrolled in CalFresh Food out of 410,108 enrolled in Public Assistance in the County. Understanding that Santa Clara County's CalFresh participation rate has room for improvement, the goal is to grow Santa Clara County's CalFresh program. Tracking this metric will allow SSA-DEBS to monitor the status and growth of the CalFresh program's size relative to public assistance program participation. Increasing the number of public assistance participants that are dually enrolled in Medi-Cal and CalFresh could potentially singularly achieve this goal of growing CalFresh enrollment as a percentage of Public Assistance enrollment by 4% over the next 5 years. Outreach to target populations not currently enrolled in Public Assistance will also contribute to this goal.

Figure 3. Increase Overall Numbers Enrolled in CalFresh Goal



*Goal # 4: Maintain or improve churn rate of 1% at 30 days and 7.3% at 90 days*

As referenced in Legislative File 105420 presented to the Board on April 20, 2021, Matt Unrath with the California Policy Lab completed a 15-year study entitled “Pushed out by paperwork: Why eligible Californians leave CalFresh Food.” In his study, Unrath had two major findings: 1) Households leave CalFresh Food when asked for paperwork, and 2) Most households who exit CalFresh Food ***are still eligible***.

SSA-DEBS is already making significant efforts to retain eligible clients and reduce “churn” (a technical term which is used to indicate when eligible clients leave the program and subsequently reapply within 30-90 days).

Since 2014, the County has consistently experienced a much lower churn rate than the statewide average. This is attributable to the implementation of Telephonic Signature (TS) by SSA-DEBS that eliminated the requirement for clients to submit a paper application for recertification.

Table 2. Santa Clara County vs. Statewide Churn Rate

Year	Churn Period	Statewide	Santa Clara
2014 Reapplication*	30 days	13%	3.5%
	90 days	20.75%	12.75%
2018 Reapplication*	30 days	12.75%	2.75%
	90 days	25%	12.75%
2019 Reapplication*	30 days	9%	1.25%
	90 days	18.25%	9.25%
2020 Reapplication*	30 days	11.8%	1%
	90 days	14.33%	7.3%

*\*Percentage of all new applications that are from households who received CalFresh Food within previous 30 or 90 days.*

*Activities to Support the Goals*

The four goals outlined above will be accomplished by:

- Implementing of the state-mandated AB79 mandate: Increasing Dual Enrollment Between CalFresh and Medi-Cal, and
- Continuing Successful Outreach/Inreach Efforts and Exploring and Expanding Proven Best Practices and Lessons Learned to Support the Goals

*Implementation of AB79: Increasing Dual Enrollment between CalFresh and Medi-Cal*

AB79 mandates that counties implement business process changes in order to increase CalFresh Food enrollment among Medi-Cal applicants and beneficiaries. The following aspects of AB79 will require changes to SSA-DEBS business processes, including training of staff, and potentially labor agreement modifications. AB79 mandates are required to be implemented by January 2022.

- Continuing EWs must screen Medi-Cal only beneficiaries for CalFresh when conducting in-person or telephone redetermination interviews. If the Medi-Cal recipient says yes, the same EW must process the CalFresh Food application for the client.
- One or more county liaisons must be created to establish and facilitate outreach communications, activities, and processes with community-based organizations (CBOs). The purpose of the liaisons is to ensure that CBOs which currently focus solely on Medi-Cal enrollment begin to engage clients in the CalFresh Food application process

*Continuing Successful Outreach/Inreach Efforts and Exploring and Expanding Proven Best Practices and Lessons Learned to Support the Goals*

DEBS has already engaged in efforts to increase outreach to eligible county residents. These efforts will be augmented by:

- Increasing usage of social media, and expanding into TV, radio, and newspaper ads, particularly targeting the immigrant community where anecdotal information indicates that 1<sup>st</sup> generation (foreign born individuals) leverages TV, radio, and newspaper in native language as the primary source of information over English language media.
- Expanding into targeted/customized outreach focused on cultural humility following lessons learned from District 5 pilot (described in SSA Off-

Agenda Report Regarding CalFresh Enrollment in D5 sent to the Board of Supervisors on April 23, 2021; Attachment D);

- Continuing innovations in streamlining of business processes that reduce barriers for clients and reduce churn including using telephonic signatures, pro-active contact with clients with missing information, and advocacy for the continued streamlining and reduction of bureaucracy and paperwork burdens for applicants and recipients, among other efforts.
- Continuing partnerships with key organizations such as Second Harvest of Silicon Valley (SHSV), and new community partnerships that put the client experience front and center.
- Continuing targeted in-reach activities such as sending CalFresh flyers, as well as CalFresh related text messages to existing Medi-Cal recipients.

### *Monitoring and Evaluating Outcomes of Increasing CalFresh Participation Goals*

To ensure that DEBS is meeting its goals, a robust evaluation plan, which tracks both process and outcome metrics will be designed. Process monitoring will provide data on how well AB79 is being implemented and on the effectiveness of outreach and internal efforts. Qualitative data will also be gathered from eligible residents in addition to quantitative metrics. Outcome's data will track the effectiveness of DEBS in reaching its goals of increasing CalFresh participation to the desired levels.

### *Staffing and Resource Needs*

Federal and state laws require that all federally and state funded eligibility worker and eligibility support positions perform eligibility work exclusively. Thus, it is not permissible for any staff in these positions to perform outreach related activities described throughout this report. Currently, all outreach related activities at SSA-DEBS is performed by one staff person with approximately the equivalent of 0.20 FTE of the individual's time dedicated to outreach related activities. Of the 20% dedicated to outreach activities in general, 10% is dedicated to CalFresh Food Outreach specifically.

In order to implement the proposed activities as outlined in this report, including the mandated implementation of AB79 by January 2022, and to track and evaluate, and make progress toward the SSA-DEBS outreach, inreach, enrollment, and

program participation goals, the following staffing and resourcing needs have been identified:

- 1 Multimedia Communications Specialist
- 1 SSA Application Decision Support Specialist
- 1 Senior Communications Officer
- 14 Eligibility Workers
- 2 Eligibility Work Supervisors
- 2 Office Specialists III/Client Services Technicians
- 1 Office Specialist II
- 1 Research & Evaluation Specialist
- Budget for advertising and marketing (social media, newspaper, TV, etc.)

c: Chief Board Aides  
Miguel Márquez, Chief Operating Officer  
James R. Williams, County Counsel  
Megan Doyle, Clerk of the Board